PeopleSoft

®

PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook
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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

• PeopleSoft application prerequisites.

• PeopleSoft application fundamentals.

• Documentation updates and printed documentation.

• Additional resources.

• Typographical conventions and visual cues.

• Comments and suggestions.

• Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

• Obtain documentation updates.

• Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

• Web

• Telephone

• Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

• Asia Pacific

• Europe

• Latin America

• North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

• USF (U.S. Federal)

• E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.

Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.
	Select Always to run the request every time the batch process runs.
	Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Sales Incentive Management for High-Tech and Industrial Preface

This PeopleBook provides an overview of the High-Tech and Industrial (HTI) market template and discusses these market template features:

- Sample company description.
- Setup data.
- Reference data.
- Formulas.
- Compensation structures.
- Participant data.
- Managing HTI order transactions.
- GBI: direct sales plans.
- Reporting.

Sales Incentive Management for HTI Market Template Overview

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Sales Incentive Management for High-Tech and Industrial (HTI). This product is a market template for processing sales incentives. A market template is a packaged library of common rules, functions, services, and tools that relate to a particular industry, sales model, or incentive approach. Market templates supplement the solution, which facilitates easier implementations. The HTI market template supports the direct sales models typically found in high-tech and industrial companies, business-to-business distribution, and high-tech hardware and software companies. You can use this market template as a starter kit for creating your own incentive structures and rules.

Note. Before reading this PeopleBook, make sure that you understand the various Sales Incentive Management components.

This book describes data from a sample company that is implemented as part of the HTI market template. The market template contains both "configuration" data and "starter kit" data. Configuration data is required for operating the system; you do not modify configuration data. Starter kit sample data is designed to showcase the HTI market template concepts and give you an idea about how you can set up your own data. For example, the HTI market template includes configuration data for configuring load steps and rollback definitions. You should not need to modify this data unless you modify your application. On the other hand, the HTI market template includes starter kit data for products and compensation structure. This data is based on a fictitious company and does not represent the data that you need for your implementation. It is intended as a model for you to follow and to illustrate the examples in this PeopleBook.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook

Other Market Templates and Tools

In addition to the HTI market template, PeopleSoft offers a market template for Banking and Capital Markets. Companies in Industries that use incentive structures related to Retail Banking, Lending, and Investment Banking will want to look at this market template. This market template provides a framework for specific banking transactions and business processes, as well as sample plans to support the different lines of business. For companies that want to design new or additional incentive structures beyond the currently available market templates or extend the existing market templates, PeopleSoft offers the Vertical Development Kit (VDK). The VDK aids customers who use one of the existing market templates to tailor additional market templates to their own business process. This collection of documents and tools helps guide the user through the creation of new plan designs (transactions, reference objects, participants, formulas, and so on) with new design elements as needed to support their business.

Sales Incentive Management also provides a data migration tool that enables you to move data from one database to another, clone data, delete data, and compare data to import against data already existing in the database. The *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* discusses this functionality in detail.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing Market Templates," Using the Data Migration Tool

CHAPTER 1

Sample Company Description

The firm in this sample scenario, Global Business International (GBI), is a composite creation based on multiple real-life firms. GBI has hardware, software, and services businesses. It operates globally and provides products and services in all of the countries it operates.

This chapter discusses:

• GBI's corporate goals.

• GBI's sales models.

• GBI's corporate policies.

• GBI's processing.

Important! The data and scenarios contained in this chapter are merely samples for your consideration. They are not meant to constitute a model for all companies or to represent all business processes.

Corporate Goals

GBI is organized into sales models. For the current fiscal year GBI has the following corporate goals that it intends to achieve with the right sales compensation strategy:

• Increase revenue growth.

• Accelerate gross profit growth.

• Increase web sales.

Sales Models

The GBI sales organization is structured around four major models of sales: direct sales, global strategic accounts, third-party sales, and ASP sales. Separate sales organizations support each of these sales models with their own structures. All sample plans delivered with the High-Tech and Industrial (HTI) market template relate to the direct sales model.

Direct Sales

Direct sales is the major portion of the sales revenue and makes up the bulk of the organization. It contains direct sales to customers either by field salespeople or by inside sales. The structure for this sales organization corresponds to the company's legal or primary organization structure. The salespeople are associated with a territory in their organization structure. They are compensated for transactions in which they have direct involvement. They are also compensated for other transactions in their territory.

Global Strategic Accounts

A separate, much smaller organization focuses on key strategic accounts for the company on a global basis. These salespeople are responsible for strategic selling into the organization and are compensated for all transactions to their assigned strategic accounts. Customer satisfaction tends to be an important performance measure in this sales organization. Salespeople in this organization are supported by a team to deliver a high level of customer satisfaction to the strategic account.

Corporate Policies

This section discusses:

- Financial policies.
- Hiring policies.
- Termination policies.

Financial Policies

There are five financial policies.

Fiscal Calendar

The fiscal year used in this scenario is fiscal year 2001. Crediting occurs every day of the period, while final calculations are completed at the end of the month. Processing for a fiscal period continues into the next month for payroll purposes.

Revenue Recognition

The corporate revenue recognition policy is to recognize revenue for various sales on the following events:

- Sales order receipt for product sales.
- Invoicing for service sales.

The policy is to pay commissions and incentives only when revenue is recognized on a transaction.

Commissionable Transactions Policy

Only orders, invoices, and related adjustments subject to the revenue recognition policy are commissionable.

Incentive Earnings Event

An incentive is considered to be legally earned once revenue is recognized on the related transaction.

Payments Policy

Payments are made as soon as they are earned. There is a one-month delay between invoice data and payouts. For example, the system calculates for period 1 (January data) during the month of February.

Hiring Policies

In a new hire or rehire situation, an employee is eligible for commissionable transactions only if the effective date of the transactions is after the employee's hire date.

Individual exceptions can be negotiated and agreed to by the participant and company.

Termination Policies

On termination of the employee from the firm due to any cause, only earned commissions through the date of termination are deemed payable, after adjustments such as draw paybacks. For bonuses to be earned, the employee must be employed through the last date of the particular fiscal period.

Individual exceptions can be negotiated and agreed to by the participant and company.

Processing

There are four processing practices.

This section discusses:

• Credits frequency

• Calculations frequency

• Other data loading

• Reporting

Credits Frequency

All incoming transactions should be processed every day and credits should be created for those calculations every day. The credits are typically for the current month, through the end of the month.

Calculations Frequency

Calculations are first run around the 25th day of the current period as a preliminary compensation run. From then on calculations are run on demand until the third day of the subsequent period.

Other Data Loading

Human resources changes, such as hires, job transfers, and terminations, are processed into the system on a daily basis. Other changes, such as structure changes, product changes, and customer account changes, can also all be done on a daily basis. All of these transactions should be loadable both from external files as well as from online pages.

Reporting

Crediting should be reported every day, both for the current period and the period about to be closed, when there is an overlap. The calculations results need to be published whenever calculations are run.

CHAPTER 2

Understanding Setup Data

The High-Tech and Industrial (HTI) market template is delivered with starter kit data for the setup data.

This chapter discusses:

- Step definitions
- Calendars
- Payment codes
- Roles
- Performance measures
- Compensation rollup layers
- Commission table definitions
- Lookup table definitions
- Workflow

Step Definitions

Many of the steps defined in the step definition components are associated with general Sales Incentive Management (SIM) processing and are not specific to the HTI market template.

The HTI market template includes predefined step definitions for the steps that are associated with a plan. To use a step in a plan template, you must first define it in the Step Definition table. For example, the PSR-IP-T plan template has the following steps:

- CREDIT
- ROLLUP
- COMMISSION
- NEW_ACCT
- QTR_BONUS
- YRLY_BONUS
- PAYOUT_M
- PAYOUT_Q
- PAYOUT_Y
- PAY_CLUB

- POST_M

- POST_Q

- POST_Y

The PeopleSoft system delivers the associated step definitions for these plan steps. The step definition directs the engine processing. You should not modify these steps. If you add new steps to your plan templates, you need to add an associated step definition. You should model it after the delivered plan step definitions.

See Also

Chapter 8, "GBI: Direct Sales Plans," Reviewing the Product Sales Representative Plan, page 46

Calendars

The HTI market template contains a starter calendar, which represents the accounting periods used for the plan templates. The calendar is "00" and is defined for years 2001 through 2025. Note that the calendar uses MODEL as the setID.

Monthly (frequency ID 1), quarterly (frequency ID 2), and annual (frequency ID 3) calendar frequencies are defined for this calendar.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Sales Incentive Management General Options," Defining Calendars

Chapter 2, "Understanding Setup Data," Calendars, page 6

Payment Codes

The HTI market template contains payment codes, several of which are used in the payout formulas within the plan templates. If you decide to use different payment codes, make sure that you update the payout formula parameters to use your payment codes.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Sales Incentive Management General Options," Setting Up the Payment System Interface

Chapter 2, "Understanding Setup Data," Payment Codes, page 6

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Sales Incentive Management General Options," Mapping Payment Codes

Roles

This table lists roles that are part of the HTI market template:

Role	Description	Comments
ACCOUNT_EXEC	Account Executive	You can find an example in compensation structure NA_SALES (CORP1 business unit) in territory NATIONAL_ACCTS.
CONSULTING_MGR	Consulting Manager	Not used in the market template.
MANAGER1	Sales Manager	Used in GBIBU compensation structure in these territories: GBIBU STRUCTURE (root node), EASTERN, MIDWEST.
MANAGER2	Sales Manager (view peers)	Not used in the market template. This is an example of how to set up a manager who needs to be able to view others (peers) on the same node.
PART	Participant	Used in GBIBU compensation structure in these territories: CENTRAL US200, CENTRAL US300, EAST COAST, MIDWEST, WESTERN.
PRODUCT_CONSULTANT	Product Consultant	Not used in the market template.
REGIONMGR1	Regional Manager	Used in GBIBU compensation structure in EASTERN territory.
REGIONMGR2	Regional Manager (view peers)	Not used in the market template. This is an example of how to set up a manager who needs to be able to view others (peers) on the same node.
SALES_VP	Vice President of Sales	You can find an example in compensation structure NA_SALES (CORP1 business unit) in territory FIELD_SALES.
SALESADMIN	Sales Administrator	You can find an example in compensation structure NA_SALES (root node). This is an example of how to set up a role that needs access to a node but is not a recipient of incentive compensation.

Role	Description	Comments
SALESREP1	Sales Representative - Products	Used in GBIBU compensation structure in CENTRAL US200 territory.
SALESREP2	Sales Representative - Services	Not used in the market template.
SLS_ENGINEER	Sales Engineer	Not used in the market template.
TECH_CONSULTANT	Technical Consultant	Not used in the market template.

Sales Incentive Management roles map to PeopleTools security roles and define workflow routing. If you create new roles, be sure to model them after the market template roles.

Performance Measures

The sample company, GBI, wants to segregate and incent performance in various kinds of customer activities. For example, key activities to incent are sales revenue and new account openings. These activities and related transactions are defined by performance measures. Input transactions can be categorized into one or more performance measures.

Reporting results (variables) are grouped by performance measures.

The HTI market template is delivered with performance measures used in the plan templates, which are associated with the setID SHARE. Associated performance categories are also delivered with the market template. You may add to these performance measures. This table lists the delivered performance measures:

Performance Measure	Description	Comments
GROSS_PRF	Gross Profit	Used for tracking performance on Gross Profit measurement.
NEW_ACCTS	New Accounts	Used for tracking new accounts.
PROD_REV	Product Revenue	Used for tracking sales of products. This is demonstrated in the product sales representative incentive plan.

Performance Measure	Description	Comments
SRVC_REV	Service Revenue	Used for tracking sales of services. This is demonstrated in the service sales representative incentive plan.
TTL_REV	Total Revenue	Used for tracking total revenue. This is demonstrated in the sales manager incentive plan.

Product Revenue

A key incentive component for the participants is product revenue. This performance measure is based on transactions that have been classified as product revenue transactions. Not all plans pay out incentive for this performance measure; higher-level plans may pay out incentive for the related total revenue category.

This performance measure comes from transactions with a type of Order. Transactions for sales of actual products (product types other than services) are considered for this category grouping. Related transactions such as shipments, reversals, and adjustments are also taken into account for the associated order.

Service Revenue

Another key incentive component for the participants is service revenue. This performance measure is based on transactions that have been classified as service revenue transactions. Not all plans pay out incentive for this performance measure; higher-level plans may pay out incentive for the related total revenue category.

This performance category comes from transactions with a type of Order. Transactions for sales with a product type of Services are the only ones considered for this category grouping. Related transactions such as shipments, reversals, and adjustments are also taken into account for the associated order.

Total Revenue

An additional key incentive component for the participants is total revenue. This performance measure is based on the total of product revenue and service revenue transactions. Higher-level plans may pay out incentive for this total revenue category.

This performance category comes from transactions with a type of Order. This category is a combination of the product and service categories. Related transactions such as shipments, reversals, and adjustments are also taken into account for the associated order.

Gross Profit

Transactions carry gross profit percent as a value on the transaction record. Gross profit is calculated using this percentage against the sales amount. Gross profit is used as an incentive only for manager levels and above, but the managers receive credit for gross profit only if a sales representative receives sales amount credit for that particular transaction.

This performance category comes from transactions with a type of Order. Unlike the other performance categories, this one uses the gross profit percent available in the transactions for incenting. For this scenario assume that gross profit percent is precalculated and loaded on the transactions; you just need to calculate the actual gross profit amount from the sales amount.

New Accounts

One of the incentive components is new account openings. Any time a new account is opened, additional compensation is provided to the participants.

This performance category covers transactions with a type of Order and with a flag on the transaction indicating that this is the first order for the customer. Types of transactions such as adjustments do not affect this category, whereas other types such as reversals or cancellations do affect it.

See Also

Chapter 2, "Understanding Setup Data," Performance Measures, page 8

Other Components

The employees in the delivered plans receive incentives based on four avenues of sales: field sales, inside sales, web sales, and third-party sales. Incentives for field and inside sales are direct and obvious.

As a policy, the company wants to make sure that sales representatives do not compete with the channel partners over the same clients. To avoid this, sales representatives also receive incentives for any sales made in their territory by third-party partners.

Business unit bonuses are paid to product and service representatives quarterly and annually if the business unit quota is exceeded. Additional incentives are issued for sales club achievement.

Compensation Rollup Layers

The HTI market template contains common values for compensation rollup layers. You can use these to define layers on your compensation structure. REGION is used in the PSR-IP-T incentive plan template as part of the Rollup Formula. If you need to roll up to regions, you should designate them as such when defining your compensation structure. If you need to roll up to another type of layer, then make sure that your Rollup Formula uses the appropriate value from the Compensation Rollup Layer table.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Sales Incentive Management General Options," Defining Compensation Rollup Layers

Chapter 2, "Understanding Setup Data," Compensation Rollup Layers, page 10

Commission Table Definitions

Commission tables are used in the plan templates to calculate commissions or commission rates. Behind each Commission table is a table definition. This table lists the commission table definitions that are delivered with the HTI market template:

Commission Table Definition	Description	Associated Commission Tables	Comments
HT-BONUS	HTI Bonus Table	ANNUAL_BONUS_MGR ANNUAL_BONUS_REP QTR_BONUS_MGR QTR_BONUS_REP	Can be used to define a bonus amount table that has steps at 100 percent, 110 percent, and 120 percent attainment. Uses the step calculation method.
HT-COMMISSION	HTI Commission Table	COMMISSION_RT_MGR COMMISSION_RT_REP	Can be used to define a commission rate table that has steps at 100 percent, 110 percent, and 120 percent attainment. Uses the threshold calculation method.
HT-NEW-ACCTS-AMT	HTI New Accounts (Count)	M_NEW_ACCT_REP	Used in the HTI plan template for the sales representative new account bonus, which is based on the number of new accounts.
HT-NEW-ACCTS-PCT	HTI New Accounts (Attainment)	M_NEW_ACCT_MGR	Used in HTI plan template for the manager new account bonus, which is based on attainment percentage.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Getting Started with Sales Incentive Management," Sales Incentive Management Implementation

Lookup Table Definitions

This table lists the Lookup table definitions:

Lookup Table Definition	Description	Associated Lookup Tables	Comments
COMMISSION_RT_2D	Commission Rate	SR_REP_COMMISSION	This lookup table is not used in the delivers incentive plans for the HTI market template. It is delivered as a stand-alone example of a two dimensional lookup table.
HT-RMGR-CALC-FCTR	Regional Mgr Calc Factor	RMGR_CALC_FACTOR	Used in HTI plan template as part of the calculation of regional manager's quarterly total revenue and gross profit bonuses.
HT-RANK-BONUS-R	HTI incentives based on rank	BRIEFCASE_R CLUB_R RANKING_BONUS_R	Used in HTI plan templates to determine awards for sales representative ranking. Representatives are ranked 1–100. This Lookup table definition defines a cell for each rank. Individual Lookup tables are created based on this definition.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Getting Started with Sales Incentive Management," Sales Incentive Management Implementation

Workflow

PeopleSoft Sales Incentive Management delivers two components to set up workflow configuration: the Configure Transaction Workflow component and the Process Control Workflow component. For the Transaction Workflow component, PeopleSoft delivers the HTI market template with a sample transaction workflow configuration for the GBIBU business unit.

The sample transaction workflow configuration for GBIBU includes work routings for the EORD class ID. EORD is the derived record for orders. It is derived from the TXEI is the base class record for transactions.

Workflow for EORD is defined for four fields: Attainment Amount, Compensation Amount, Payout Amount, and Sales Amount.

Here is an example of the EORD workflow configuration (Compensation, Sales Incentives, Define Sales Incentive Options, Transaction Workflow):

Configure Transaction Workflow (1 of 2)

Configure Transaction Workflow (2 of 2)

In this example, MANAGER1 approves all payouts and compensation amounts up to 5,000.00 USD. Anything above that amount is approved by REGIONMGR1. It is important to define an approver with the maximum amount; otherwise, errors may occur when editing transactions over 5,000.00 USD.

The GBIBU compensation structure is defined with roles for MANAGER1 and REGIONMGR1. It is important that you define roles on your compensation structure that match the roles that you define in the workflow configuration pages. If your roles are not assigned to your compensation structure, you receive an error when editing transactions that trigger workflow.

In the GBIBU compensation structure, the MANAGER1 role is found on the regional territories EASTERN and MIDWEST. The REGIONMGR1 role is found on the EASTERN territory and the root note GBIBU STRUCTURE.

Sample user IDs are set up for these participants: Sandy Ralphs (SRALPHS) and Burt Lee (BURTLEE). Sandy is a sales manager (SIM role = MANAGER1) in the Midwest territory of GBIBU while Burt is the regional manager (SIM role = REGIONMGR1) assigned to the root node of the compensation structure.

Note. For workflow to function correctly, approvers must have a valid email address associated with their user ID and they must be assigned a PeopleTools role that specifies workflow query and routings. The PeopleSoft system delivers a sample role of SIM sales manager.

Workflow is triggered in GBIBU if an order transaction is updated for a participant that is in the MIDWEST region. The amount of the transaction determines the workflow routing.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Sales Incentive Management General Options," Setting Up SIM Workflow

CHAPTER 3

Understanding Reference Data

The High-Tech and Industrial (HTI) market template contains sample and system reference data. This chapter discusses:

- Products
- Customers
- Industries
- Geographies
- Channels
- Numeric ranges

Products

GBI has three major revenue producers and all of the company's products are organized into three major categories: hardware, software, and services. Product sales representatives are compensated for sales of physical products (hardware or software) while services sales representatives are compensated for sales of services. Both physical products and service-related products are stored in the Product table. The Product table is one type of reference object supported by Sales Incentive Management.

The PeopleSoft system delivers sample data for products. Following is an example of how the plans might use product data.

Example

This table discusses two delivered products, with different settings for the Third Party flag:

Set ID	Product ID	Effective Date	Product Category	Description	Third Party?	Commissionable?
SHARE	IUT-05	4/6/00	MONITOR	MultiScan E200 Monitor 17"	N	Y
SHARE	LT5001	5/10/00	HARDWARE	Printer cartridge	Y	Y

In the PSR-IP plan, the Credit Order rule looks to see whether the order source code is a third party; if so, it applies credit differently according to the plan rule.

Here is the credit order rule in the plan:

PSR-IP plan: Credit step, Credit Orders section

The Third Party flag determines credit percentage. (If it's a third-party deal, the sales representative receives 25 percent of the credit.) The Commissionable flag is set to *Yes* for all data in the HTI market template; however, this flag is not used within the plans. Instead, product groups are used to determine which products are eligible for commission.

Usage of Product Table Fields Within Plans

The individual Product is not used in the GBIBU compensation structure.

Product Groups

The HTI market template includes sample product groups. You can view these product groups by using the Create Reference Groups page under Compensation, Sales Incentives, Define Sales Org Structure.

This table lists delivered product groups:

Group ID	Description	Comments
CORE_PRODUCTS	A list of all products that are considered commissionable.	This is an example of another way to separate commissionable products from the full product list. This product group is used within the plan to determine whether a transaction is eligible for sales credit.

Group ID	Description	Comments
PRODUCTS	A list of all physical products (excluding services).	Used within the plan to determine which products are credited to product sales representatives.
SERVICES	A list of all service offerings (those that were excluded from the PRODUCTS group).	Used within the plan to determine which products are credited to service sales representatives.

Usage of Product Groups Within the Plans

Product groups are used in these GBIBU compensation structure territories:

• All child nodes territories for CALIFORNIA

• EAST COAST

• BALBOA

• CENTRAL US200

• CENTRAL US300

These territories contain reference relationships that point to the product group reference object. For example, the BALBOA territory contains a reference relationship called PRODUCTS that points to the PRODUCTS reference object. This relationship is used in conjunction with the incentive plan allocation rule to allocate transactions to the territory.

Customers

GBI has customers in multiple industries that are addressed by one or more of the described sales models. The company needs to keep the entire structure of customers, their locations, and subsidiaries, if any, to make sure that the right incentives are provided to the right sales representative. Product and service sales representatives receive an extra incentive for generating new accounts. Account executives receive incentive payments based on sales to their assigned accounts. The designation of "new account" is applied at the time that the transaction is brought in from the source system. Customers (accounts) are stored in the Customer table. Customers are one type of reference object supported by Sales Incentive Management. Account assignment can be defined on the compensation structure through reference relationships, or the responsible account executive can be identified directly in the Sales Rep field in the Customer table.

The HTI market template includes sample data for customers. Following is an example of how the plans might use customer data.

Customer Groups

The HTI market template includes sample customer groups. You can view these customer groups on the Customer Groups page (Compensation, Sales Incentives, Define Sales Org Structure, Create Reference Groups).

This table lists delivered customer groups:

Group ID	Description	Comments
NATIONAL_ACCTS	Group of all customers designated as national accounts. Combines NATIONAL_ACCTS_ EUR, NATIONAL_ACCTS_US, and some individual accounts for Australia.	This is the top-level group. It is a good example of using a "group of groups" to define a hierarchy.
NATIONAL_ACCTS_DEU	Group of all customers designated as national accounts in Germany.	
NATIONAL_ACCTS_EUR	Grouping of NATIONAL_ ACCOUNTS_DEU, NATIONAL_ACCOUNTS_FRA, and one individual account for Belgium.	
NATIONAL_ACCTS_FRA	Group of all customers designated as national accounts in France.	
NATIONAL_ACCTS_US	Group of all customers designated as national accounts in the U.S.	

Industries

The HTI market template includes the following sample industry data:

SetID	Industry ID	Description
SHARE	COMPUTERS	Computers, retail sales
SHARE	CONSULTING	Consulting services
SHARE	EQUIPMENT	Computer equipment, retail hardware
SHARE	FOODSERVICE	Food service
SHARE	HEALTHCARE	Health care
SHARE	IND_01	Aerospace

SetID	Industry ID	Description
SHARE	OUTDOOR	Outdoor products
SHARE	PERIPHERALS	Computer peripheral devices, retail
SHARE	PROGRAMMING	Computer programming services
SHARE	SOFTWARE	Computer software, retail

Industry Groups

The HTI market template includes the following sample industry groups:

Group ID	Description	Comments
STRATEGIC	A list of industries considered to be strategic.	There are two effective-dated rows in this table: 2001 and 2002. This demonstrates how the data can be updated each year, without requiring a change to the plans or compensation structure.

Geographies

The HTI market template includes sample data for geographies. Following is an example of how the plans might use geography data.

Example

This table lists some delivered geography data, representing different parts of the world:

SetID	Geography ID	Description	Geography Type
SHARE	AK	Alaska	State
SHARE	GU	Guam	State
SHARE	IN	Indiana	State

SetID	Geography ID	Description	Geography Type
SHARE	NM	New Mexico	State
SHARE	PR	Puerto Rico	State

In the STATES-CP configuration plan, the transaction allocation rule looks at the geography data and allocates order transactions to the appropriate territory node when the geography reference object on the transaction matches the geography reference object on the node.
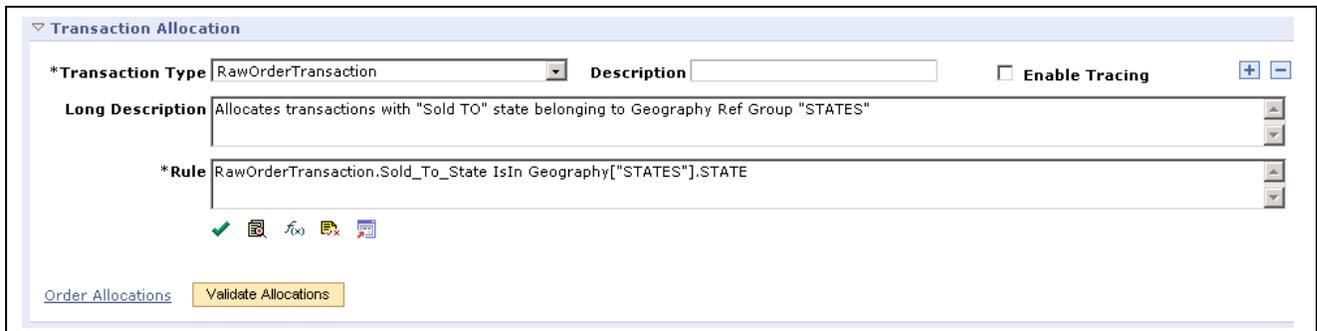
STATES-CP transaction allocation rule

Usage of Geography Table Fields Within Plans

Geographies of the type State are used in these GBIBU compensation structure territories:

• CALIFORNIA

• ILLINOIS

• MINNESOTA

• NY

• WASHINGTON

These territories contain reference relationships that point to the geography reference object. This relationship is used in conjunction with the STATES-CP configuration plan to allocate transactions to the territory.

Geography Groups

The HTI market template includes the following sample geography groups:

Group ID	Description	Comments
EASTERN_STATES_US	A list of states on the U.S. East Coast.	Example only. Your designation of "eastern states" may vary.
INTERNATIONAL	A list of regions considered to be international.	Example only. Your designation of "international" may vary.

Group ID	Description	Comments
MIDWESTERN_STATES_US	A list of states in the U.S. Midwest.	Example only. Your designation of "midwestern states" may vary.
NEW_ENGLAND	A list of states in the U.S. commonly referred to as New England.	
WESTERN_STATES_US	A list of states on the U.S. West Coast.	Example only. Your designation of "western states" may vary.

Usage of Geography Groups Within Plans

Geography groups are used in these GBIBU compensation structure territories:

• EASTERN

• MIDWEST

• NEW_ENGLAND

• WESTERN

These territories contain reference relationships that point to the geography group reference object. This relationship is used in conjunction with the STATES-CP configuration plan to allocate transactions to the territory.

Channels

The HTI market template includes the following sample channel data:

SetID	Channel	Description
SHARE	3RDPTY	Third-party sales
SHARE	ASP	Internet websites (hosting)
SHARE	CRM	Customer Relationship Management (CRM)
SHARE	DIRECT	Direct sales - field
SHARE	STRATEGIC	National sales (strategic)

SetID	Channel	Description
SHARE	THIRD PARTY	Third-party sales for all products
SHARE	WEB	Web sales

Channel Groups

The HTI market template includes this sample channel group:

Group ID	Description	Comments
FOCUS	A list of channels that are the focus for the company in a particular year.	You might use a channel group to provide incentives to a business development team based on channels that are important to your organization.

Numeric Ranges

The HTI market template includes sample data for numeric ranges. The Numeric Range object can only be used for numeric postal codes (such as United States zip codes) and is not applicable to alphanumeric postal codes.

This table shows some examples of ways in which your company can divide zip code values into numeric ranges to define territories:

SetID	Numeric Range ID	Description	Begin Range	End Range
SHARE	01269-02269	01269-02269 (zip codes)	>=01269	<=02269
SHARE	07722	07722 (zip code)	>=07722	<=07722
SHARE	20001-20159	20001-20159 (zip codes)	>=20001	<=20159
SHARE	60601-60687	60601-60687 (zip codes)	>=60601	<=60687
SHARE	67530	67530 (zip code)	>=67530	<=67530

SetID	Numeric Range ID	Description	Begin Range	End Range
SHARE	85250-85271	85250-85271 (zip codes)	>=85250	<=85271
SHARE	Greater LA	Greater Los Angeles	>=90210	<=90211

Usage of Numeric Ranges Within Plans

Numeric ranges are used in these GBIBU compensation structure territories:

• BALBOA

• CENTRAL US200

• CENTRAL US300

• CENTRAL US400

• EAST COAST

• LOS_ANGELES

• NORTHERN_CA

• SACRAMENTO

• SAN DIEGO

• SOUTHERN_CA

These territories contain reference relationships that point to the numeric range reference objects. The reference relationship is used in conjunction with the ZIPCD-CP configuration plan to allocate transactions to the territory.

Numeric Range Groups

The HTI market template contains no delivered numeric range groups.

CHAPTER 4

Understanding Formulas

The PeopleSoft system delivers formulas that apply specifically to the High-Tech and Industrial (HTI) market template. These formulas enable you to hold and release order transactions, as appropriate, to move them through the calculation process.

The *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* describes delivered formulas that apply to all Sales Incentive Management incentive tasks. This chapter lists those that apply only to this market template.

Delivered Formulas for Sales Incentive Management for High-Tech and Industrial

This table lists the Sales Incentive Management delivered formulas for the HTI market template:

Formula	Description	Business Use Examples
HoldForInv	Holds a transaction until an invoice releases it. While a transaction is held, it does not undergo further processing. Therefore, if there are other calculations or processing, such as rollups, that need to happen based on the transaction, they must occur before the transaction gets put on hold.	A transaction held for invoice will get released in the future when an invoice comes in with logic that uses the ReleaseByInv formula to release the current transaction. You can specify another transaction to be held. For instance, you might need to hold only part of a transaction. In that case, you would duplicate the current transaction using DupTxn, make adjustments to both old and new transactions, and place the new transaction on hold.
HoldForPymnt	Holds a transaction until a payment releases it. While a transaction is held, it does not undergo further processing. Therefore, if there are other calculations or processing, such as rollups, that need to happen based on the transaction, they must occur before the transaction gets put on hold.	A transaction held for payment will get released in the future when a payment comes in with logic that uses the ReleaseByPymnt formula to release the current transaction. You can specify another transaction to be held. For instance, you might need to hold only part of a transaction. In that case, you would duplicate the current transaction using DupTxn, make adjustments to both old and new transactions, and place the new transaction on hold.

Formula	Description	Business Use Examples
HoldForShip	Holds a transaction until a shipment releases it. While a transaction is held, it does not undergo further processing. Therefore, if there are other calculations or processing, such as rollups, that need to happen based on the transaction, they must occur before the transaction gets put on hold.	A transaction held for shipment will get released in the future when a shipment comes in with logic that uses the ReleaseByShip formula to release the current transaction. You can specify another transaction to be held. For instance, you might need to hold only part of a transaction. In that case, you would duplicate the current transaction using DupTxn, make adjustments to both old and new transactions, and place the new transaction on hold.
ReleaseByInv	Releases transactions that are held for an invoice, which match the allocation and order numbers present on the current transaction. Once all holds are removed from a transaction, it can continue along the calculation process.	Release a transaction that was previously placed on hold with the HoldForInv formula.
ReleaseByPymnt	Releases transactions that are held for a payment, which match the allocation and order numbers present on the current transaction. Once all holds are removed from a transaction, it can continue along the calculation process.	Release a transaction that was previously placed on hold with the HoldForPymnt formula.
ReleaseByShip	Releases transactions that are held for a shipment, which match the allocation and order numbers present on the current transaction. Once all holds are removed from a transaction, it can continue along the calculation process.	Release a transaction that was previously placed on hold with the HoldForShip formula.

Note. The HTML Help section of the Formula Catalog page provides additional details about each formula, such as usage, parameters, return value, and examples. This table focuses on the purpose of each formula and when and why you might want to use it.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing Formulas," Reviewing Delivered Formulas

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, "Understanding Formulas," BCM Formulas

CHAPTER 5

Understanding Compensation Structures

GBI has multiple organization structures that overlap significantly; these include but are not limited to the legal (or primary) structure, human resources structure, and sales organization structure. This chapter discusses:

- Legal or primary structure.
- Direct sales structure.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Working with Compensation Structures"

Legal or Primary Structure

The legal or primary structure is the basic structure used by the direct sales organization. GBI is the highest level of the company. The company has the following unit levels defined for its structure:

- Theatre
- Country
- Region
- Area
- Territory

This structure is geographic in nature and covers everything from financial reporting to base salary determinations.

Direct Sales Structure

The direct sales structure completely follows the legal or primary structure. At the sales representative level there is further specialization by product sales versus service sales. The direct sales structure is represented by the GBIBU compensation structure, as shown here:
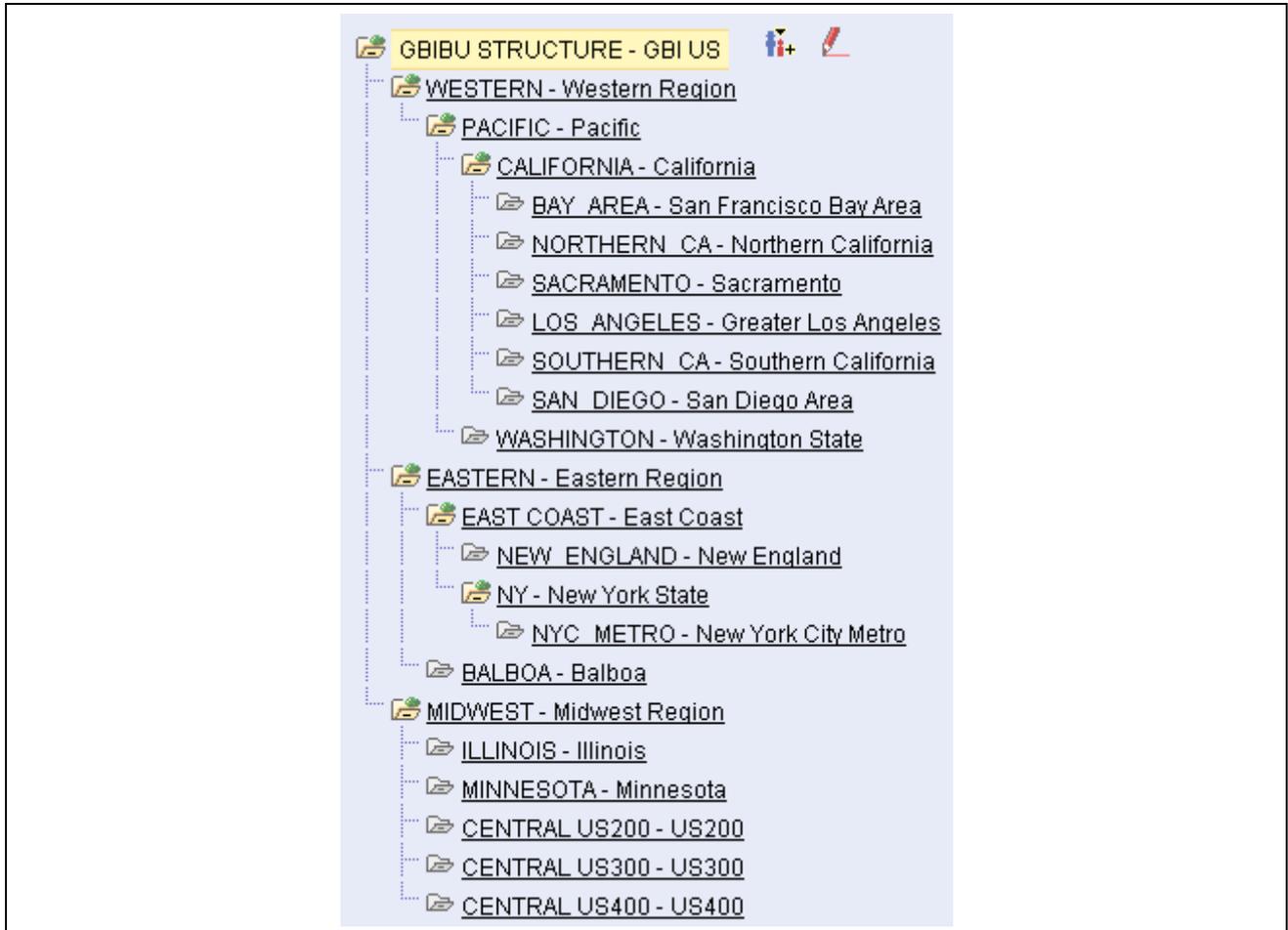
GBIBU compensation structure

CHAPTER 6

Understanding Participant Data

Some participants are affected by the sales compensation business process. They can be broadly divided into compensation recipients and system administrators. Data about these participants is normally available from the relevant PeopleSoft Enterprise HRMS and CRM systems that feed Sales Incentive Management.

This chapter discusses:

• Template data.

• Template participants.

• System administrators.

Template Data

The PeopleSoft system delivers sample data for market template participants. This table lists some of the sample participant data:

Comp Node	SIM Role	Partic ID	Participant Name	Incentive Plan	User ID and Password
BALBOA	PART	KU0051	Murphy, Terry	PSR-IP	TMURPHY
BAY AREA	PART	1003	Edwards, Stuart	SSR-IP	SEDWARDS
EASTERN	MANAGER1	KU0137	DeMarco, Tony	SMGR-IP	TDEMARCO
GBIBU STRUCTURE	REGIONMGR1	KU0127	Lee, Burt	RMGR-IP	BURTLEE

Usage of Participants Within Plans

These are some of the delivered compensation structure nodes to which participants are assigned:

• BALBOA

• BAY AREA

• CENTRAL US200

• CENTRAL US300

• EAST COAST

- EASTERN

- LOS ANGELES

- MIDWEST

- NORTHERN_CA

- SACRAMENTO

- SAN DIEGO

- SOUTHERN_CA

- WESTERN

These territories contain participant relationships that point to the participant object. The participant relationship includes the assigned participant IDs as well as plan and user interaction object information.

Participant Groups

The High-Tech and Industrial (HTI) market template includes the following sample participant groups:

Group ID	Description
ACCOUNT_REPS	List of participants on an account team.
INDIANA_MGRS	List of participants who are managers based in Indiana.
PRODUCT REPS	List of participants who are field product sales representatives.
REPS_EUROPE	List of sales representatives who are based in Europe.
SERVICE_REPS	List of participants who are field sales service representatives.

To access participant groups, navigate to Compensation, Sales Incentives, Define Sales Org Structure, Create Participant Groups.

Usage of Participant Groups Within Plans

Participant groups are not used in the GBIBU compensation structure. They are delivered as examples of types of groups that you might create to facilitate maintaining participant assignments to territories. The GBIBU compensation structure assigns all participants as individuals, not groups.

Template Participants

Among compensation recipients, the following participants are highlighted in this market template:

- Sales representatives

- Sales Managers

- Regional sales manager

The sales representative job groups cover participants who are involved in the selling process and have direct contact with the customers. These are the jobs that are most likely to have their compensation based on direct credit from sales transactions. Sales representatives are shown in the PSR-IP and SSR-IP incentive plans. The sales manager and regional sales manager job groups are responsible for managing the salespeople groups and tend to have much of their compensation as rollup or indirect credits. Comparatively, more of their compensation is likely to come from performance measures that are not used in salesperson compensation. The managers also must have access to do maintenance tasks such as workflow approvals. Sales managers are shown in the SMGR-IP incentive plan. Regional managers are shown in the RMGR-IP incentive plan.

System Administrators

Administrators implement and run the sales compensation process and typically have comprehensive access to the system. The market template includes sample security setup for two types of administrators: compensation administrator and IT specialist.

The compensation administrator has access to business setup and incentive plan components. There are two variations of compensation administrator access: one for high-tech market template objects only, the other for all market templates.

The IT specialist has access to technical components such as metadata definitions. You can mix and match the security from these two examples to match the system administration roles and responsibilities in your organization.

Sales Incentive Management delivers the SIM-specific permission lists in the sample data on which you can base your organization's permission lists.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Setting Up Security"

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Setting Up Security," Setting Up General PeopleTools Security

Managing HTI Order Transactions

This chapter provides an overview of order transaction management and discusses how to:

- Correct staged order transactions.
- Manage order transactions.
- View participant UI pages.
- Use HTI market template-specific searches.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing Incentive Transactions"

Understanding Order Transaction Management

Sales Incentive Management enables you to edit order transactions for your business unit before they are used for sales incentive calculation. (You can also edit order transactions in the system staging tables using the component available under the Manage Source Data menu.) The value in the transaction state field determines whether the transaction can be edited.

Note. Use the Transaction Processing States page (Compensation, Sales Incentives, Define Sales Incentive Options, Transaction Processing States) to see which transaction states you can edit. If the Change Allowed check box is selected, you can edit the transactions that are in this state.

Order transactions are derived from the SIM transaction base class object and are stored as derived objects in the system object catalog. You can also edit the derived object attributes such as order details, shipping details, and invoice details. The order derived object is connected with the transaction base object by SIM keys and classID. Because orders are stored in the object catalog, you can use Query Builder to query for these objects.

You can change all editable attributes of the SIM transaction (base class), such as run state, transaction state (to promote the transaction to a different state), transaction amount, performance measure, and so on. You can also reassign transactions to another participant, and clone a transaction to create a replica of the original transaction object. The ability to clone the original transaction saves you the time of having to reenter details of a transaction object that you want to duplicate.

Correcting Staged Order Transactions

To correct staged order transactions, use the Order Transactions - Staged component (EI_MAINT_SOURCE_TX). Use the EI_MAINT_SOURCE_TX component interface to load data into the tables for this component.

The Order Transactions - Staged component enables you to edit individual staged transactions in the staging tables before the stage transactions are allocated.

Order transactions can be imported into the staging tables by way of ETL maps, or manually added. Once the transactions are in the staging tables you can perform one of two actions:

• Assign a tree name to the staged transaction, and run a SIM engine allocation process.

  The process "picks up" the transaction and allocates it to the assigned compensation structure.

• Click the Create Production Transaction button to manually allocate the transaction.

When you use the Maintain Source Order page of the Order Transactions - Staged component, you are editing the base class details for the order object. When you edit order information, shipping information, or invoice information in this component, you are editing derived class information for the order object.

This section discusses how to:

• Maintain source order transactions.

• Maintain source transactions order details.

• Maintain source transactions shipping details.

• Maintain source transactions invoice details.

Pages Used to Correct Staged Order Transactions

Page Name	Object Name	Navigation	Usage
Maintain Source Order	EI_MAINT_SOURCE_TX	Compensation, Sales Incentives, Maintain Source Data, Transactions, Order, Maintain Source Order	Edit general information for an order transaction.
Order Details	EI_MAINT_ORD_STG	Compensation, Sales Incentives, Maintain Source Data, Transactions, Order, Order Details	Edit order, commission, and customer details for an order transaction.
Shipping Details	EI_MAINT_SHIP_STG	Compensation, Sales Incentives, Maintain Source Data, Transactions, Order, Shipping Details	Edit shipping detail and address information for an order transaction.
Invoice Details	EI_MAINT_INV_STG	Compensation, Sales Incentives, Maintain Source Data, Transactions, Order, Invoice Details	Edit invoice and payment details for an order transaction.

Maintaining Source Order Transactions

Access the Maintain Source Order page.

Maintain Source Order page

Run State	Select Ready if the order is ready for processing, or Held if it is not ready for processing. You might set the state to Held if the transaction needs to be approved by someone before it can be processed by the system.
Tree Name	Indicates the tree structure associated with the source transaction's business unit. If you enter a tree name, the system knows which compensation structure should receive this transaction during the Allocation process. This is an optional field.
Create Production Transaction	This functionality enables you to perform the allocation of the transaction, by selecting the transaction's total context: the compensation structure, node, participant, and plan to which this transaction belongs. (It is essentially the same as the allocation process performed by the EIM Engine, except that it is performed for a single transaction.)
	When you are finished editing the order transaction, click to create a production transaction. You then associate the production transaction with a selected participant on the Update Source Transaction - Select a Participant page.

Maintaining Source Transactions Order Details

Access the Order Details page.

Order Details page

This page and the remaining pages in this component display all of the order details for source transactions. You can either load transaction order details from a source system or enter the details directly into the component. If you're loading the data from a source system, these fields describe the details that are already part of the order transaction as entered in the source. If you're using these pages to define the transactions, you define the meaning of these fields and enter their values. The data in the fields within this component is the data that you are going to use in your incentive calculations. Your must enter data into all fields that you will use in your calculations; you can leave the other fields blank. Once you move the data into the production tables, you can use this data for your incentive calculations. In addition, the fields found in this component might help you identify a transaction based on the order details from the source.

The Order Details group box on this page displays information about the product that the customer ordered in the transaction. The Commission Details group box displays information about the commission already calculated on the order. The Customer Details group box displays details about the customer who placed the order.

Maintaining Source Transactions Shipping Details

Access the Shipping Details page.

Shipping Details page

The Shipping Details group box displays shipping information about the product that the customer ordered in the transaction. The Shipping Address group box displays information about the address to which the customer shipped the order.

Maintaining Source Transactions Invoice Details

Access the Invoice Details page.

Invoice Details page

The Invoice Details group box displays information about the invoice for the order. The Payment Details group box displays information about customer payment of the order.

Managing Order Transactions

To manage order transactions, use the Update Order Transaction component (EI_MAINT_TRANS). Use the EI_MAINT_TRANS component interface to load data into the tables for this component.

This component enables you to manage the production transactions (transactions that have been moved from staging to production tables by either the manual or engine allocation process). You can edit an order transaction including order, shipping, and invoice details. Order transaction objects are derived from the SIM transaction object and stored in the Order table. All manual changes made to order transactions are journaled for auditing purposes.

To manage an order transaction:

1. (Optional) Update transaction details.

2. (Optional) Reassign a transaction.

3. (Optional) Clone a transaction.

4. (Optional) Update the transaction order details.

5. (Optional) Update the transaction shipping details.

6. (Optional) Update the transaction invoice details.

Pages Used to Manage Order Transactions

Page Name	Object Name	Navigation	Usage
Update Order Transaction	EI_MAINT_TRANS	• Compensation, Sales Incentives, Update Transactions, Order, Update Order Transaction • Click a transaction object link in a Query Builder query.	Update base transaction details.
Order Details	EI_MAINT_ORDER	Compensation, Sales Incentives, Update Transactions, Order, Order Details	Update transaction order details.
Shipping Details	EI_MAINT_SHIP	Compensation, Sales Incentives, Update Transactions, Order, Shipping Details	Update transaction shipping details.
Invoice Details	EI_MAINT_INVOICE	Compensation, Sales Incentives, Update Transactions, Order, Invoice Details	Update transaction invoice details.

Updating Transaction Details

Access the Update Order Transaction page.

Update Order Transaction page

Reassign	Click to reassign the transaction to another participant that you select.
Fiscal Year	Displays the fiscal year in which the transaction occurred. The fiscal year is derived from the transaction period context.
Accounting Period	Displays the accounting period in which the transaction occurred. Typically an accounting period represents a month, but it can also represent a day or a different user-defined time interval.
Approval Status	Indicates the transaction approval status. Values are: *Approved, Denied,* and *Pending.* This value is used in conjunction with workflow. When you change a transaction that has been configured to trigger workflow, the approval status is set to pending, and the workflow is triggered to create a worklist so that appropriate persons can approve the transaction. If the person can approve the transaction, the approval status is set to *Approved.* If not, the person either denies the transaction, or the transaction is routed to a person in authority for approval.
Run State	Select Ready if the order is ready for processing, or Held if it is not ready for processing. You might set the state to Held if the transaction needs to be approved by someone before it can be processed by the system.
Transaction State	Displays the transaction state of the transaction. Transaction processing states are maintained by using the Transaction Processing States page under the Define Sales Incentive Option menu.

Performance Measure	Displays the performance measure associated with the transaction. Performance measures are maintained by using the Performance Measures page under the Define Sales Incentive Option menu.
Payment Code	Displays the payment code associated with the transaction. Payment codes are maintained by using the Payment Codes page under the Define Sales Incentive Option menu.
Source Amount, Source Currency, and **Source UOM** (source unit of measure)	Displays the amount, currency, and UOM associated with the source order transaction. UOMs are maintained by using the Unit of Measure page under the Define Sales Incentive Option menu.
Transaction Amount	Displays the transaction amount calculated and stored in the base currency associated with the business unit associated with the transaction.
Transaction Currency	Displays the currency in which the transaction occurred.
Transaction UOM (transaction unit of measure)	Displays the UOM used for transactions in the system.
Credit Amount	Displays the amount credited against the amount of the transaction.
Credit UOM (credit unit of measure)	Displays the UOM used to record system credit.
Date Credited	Displays the date on which the transaction was credited in the system.
Compensation Amount	Displays the compensation amount recorded in the system.
Comp UOM (compensation unit of measure)	Displays the UOM of compensation amount recorded in the system.
Date Compensated	Displays the date on which the participant was compensated for the transaction.
Payout Amount	Displays the payout amount associated with the order transaction. The Payout formula updates this field.
Payout UOM (payout unit of measure)	Displays the payout unit of measure associated with the source order transaction. The Payout formula updates this field.
Payout Date	Displays the payout date associated with the source order transaction. The Payout formula updates this field.
Save and Clone	You can clone an SIM transaction. Cloning a transaction saves all of your modifications and creates an identical SIM transaction with a new set of SIM keys. After cloning the transaction, the system displays the new cloned transaction on the Update Order Transaction page for editing.

See Also

Chapter 7, "Managing HTI Order Transactions," Correcting Staged Order Transactions, page 34

Updating Order Details

Access the Order Details page.

See Also

Chapter 7, "Managing HTI Order Transactions," Correcting Staged Order Transactions, page 34

Updating Shipping Details

Access the Shipping Details page.

See Also

Chapter 7, "Managing HTI Order Transactions," Correcting Staged Order Transactions, page 34

Updating Invoice Details

Access the Invoice Details page.

See Also

Chapter 7, "Managing HTI Order Transactions," Correcting Staged Order Transactions, page 34

Viewing Participant UI Pages

The participant UI pages are the reporting pages that enable participants to view order-related compensation information published by compensation administrators. The *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* explains the participant UI reporting interfaces, the UIOs that the Participant UI Framework uses when rendering the participant UIs, and the reports viewable to the participants. The Reporting chapter of this book lists the used in the HTI market template and their use in the delivered sample data.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing the Participant Reporting Interfaces," Understanding the Participant Reporting Interfaces

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing the Participant Reporting Interfaces," Reviewing Participant Sales Compensation Information

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing User Interaction Objects"

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Sales Incentive Management Reports"

Using HTI Market Template-Specific Searches

Sales Incentive Management delivers the following predefined participant queries for use with the Participant Search utility in the participant UIs of the HTI market template:

• My Transaction Details

• Customer Information

• Product Information

• My Salespersons Orders

• My Salespersons Information

The *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* provides a detailed list of these participant queries as part of the Participant Search Utility setup.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing the Participant Reporting Interfaces," Setting Up the Participant Search Utility

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing the Participant Reporting Interfaces," Using the Participant Search Utility

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Using Query Builder"

CHAPTER 8

GBI: Direct Sales Plans

The GBI direct sales plans cover compensation for sales representatives, sales managers, and regional managers based in the U.S.

Employees for these plans are organized as follows. The employees are set up for the U.S. country-related organizational units. At the lowest level of the structure, field sales representatives are individually associated with each territory.

This chapter discusses how to:

- Review plan templates and plans.
- Review crediting standards.
- Review performance measures.
- Review employee details.
- Review the product sales representative plan.
- Review the service sales representative plan.
- Review the sales manager plan.
- Review the regional sales manager plan.

Reviewing Plan Templates and Plans

The incentive plans and incentive plan templates in this section represent GBIBU's direct sales compensation plans. This section discusses:

- Plan templates
- Plans

Plan Templates

This table lists delivered GBI plan templates:

ID	Description
PSR-IP-T	Product sales representative incentive plan template.
SSR-IP-T	Service sales representative incentive plan template.

ID	Description
SMGR-IP-T	Sales manager incentive plan template.
RMGR-IP-T	Regional sales manager incentive plan template.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Plan Templates"

Plans

This table lists delivered GBI plans:

ID	Description
PSR-IP	Product sales representative incentive plan.
SSR-IP	Service sales representative incentive plan.
SMGR-IP	Sales manager incentive plan.
RMGR-IP	Regional sales manager incentive plan.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Plans"

Reviewing Crediting Standards

The participants in these plans receive credit for transactions flowing through (or rolling up) to their territories, for the appropriate performance measures, with the correct effective dates. These allocation rules reside in the PSR-IP and SSR-IP plans.

Transactions are considered to be in a participant's territory if the sold-to location zip code on the transaction falls within the definition of the participant's territory. The allocation rule in the ZIPCD-CP configuration plan handles this part of the transaction allocation logic.

Rollup credits pass on credits to higher-level organizational units and participants. In the case of gross profit performance measure, this credit is provided to higher-level participants in the structure but is based on related credit given to sales representatives under the product revenue or service revenue category. The SMGR-IP plan receives rollups from the lower-level PSR-IP and SSR-IP plans.

Reviewing Performance Measures

There are five types of delivered performance measures, which are used in the delivered incentive plans:

- New accounts
- Product revenue
- Service revenue
- Total revenue
- Gross profit
- Other components

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Defining Sales Incentive Management General Options," Defining Performance Measures

Reviewing Employee Details

Employees for these plans are organized as follows. The employees are set up for the U.S. country-related organizational units. At the lowest level of the structure, field sales representatives are individually associated with each territory.

The following employee groups in the direct sales organization are covered by these plans:

- Product sales representative
- Service sales representative
- Sales manager
- Regional sales manager

Quarterly and annual quotas are assigned for each sales representative or territory for product revenue and service revenue transactions. The quotas are determined at the territory level and then passed on to the associated sales representative.

At the manager levels, quarterly and annual quotas are assigned at the appropriate unit and passed on to the associated manager. For managers, quotas are normally set up for multiple performance measures. Quotas for managers do not have the sum of territories or sales representatives reporting to them.

Sales credits must be cumulated within a month to determine the appropriate attainment level and commission rate to use with the credit. Sales credits must be cumulated quarter-to-date (QTD) and year-to-date (YTD) for relevant bonuses.

The plan templates and plans delivered with Sales Incentive Management for High-Tech and Industrial include definitions of variables and accesses that cumulate the necessary quarterly and yearly attainments.

Reviewing the Product Sales Representative Plan

Product sales representatives are assigned to the PSR-IP incentive plan. This section provides an overview of the PSR-IP incentive plan and discusses the PSR-IP incentive plan structure.

Understanding the PSR-IP Incentive Plan

Here are some high-level characteristics of the PSR-IP incentive plan:

- This plan is for employees who are product field sales representatives for all territories in any region, within the U.S.
- Salespeople under this plan are paid based on two key performance measures: product revenue and new accounts.
- Transactions generating credits must belong to the participant's territory.
- Product commissions are calculated by multiplying earned credits of the performance measures for each product family by a rate.
- A new accounts incentive is paid based on the number of new accounts opened in the salesperson's geographic territory.
- A bonus is paid quarterly and annually if all sales exceed the product (cumulated) quota amount for the quarter or year at the region level.

    All representatives receive the bonus if the goal is surpassed.

Transactions and Credits

For product revenue commission, the system generates credits for transactions that fit the following criteria:

- For transactions with a performance measure of Product Revenue, when transaction type = Order, provide 50 percent of sales amount as credit to the territory or salesperson, with an immediate pay status.
- For transactions with a performance category of Product Revenue, when transaction type = Order, provide 50 percent of sales amount as credit to the territory or salesperson, with a held status that waits for the corresponding shipment transaction to be paid out.
- For transactions such as adjustments and reversals, appropriate credits are given or taken back.
- For these transactions, commission rate is based on an attainment matrix.

    In other words, commission rate can change on a transaction-by-transaction basis. Commission rate is determined at the time of credit generation. The PSR-IP incentive plan uses a Commission table to find the appropriate commission rate.

- For new accounts incentives, credits are generated for transactions that fit the following criteria.

    For transactions with a type of Order, if the new account flag is selected, then provide one credit to the territory or salesperson.

> **Note.** For this credit, you ignore the performance measure, under the policy that the salesperson is involved in the opening of new accounts in his or her territory, regardless of the kind of sales being achieved with the account.

• For reversal or cancellation of an order, take back the associated credit for the original order as long as the original order was in the current fiscal year.

If the sales channel used for an order in the salesperson's territory is Third Party, then the sales representative receives only 25 percent of the normal credit. This compensates for channel conflict.

PSR-IP Incentive Plan Structure

This section provides a summary of the PSR-IP plan and explains plan processing step by step.

Plan Rules page (1 of 7)

This plan is based on the PSR-IP-T template. The plan is designed to pay a monthly sales commission and new account bonuses. It also pays a business unit bonus quarterly and annually. This plan's allocation rule allocates orders, shipments, and adjustments where the product ID matches the Products reference object group attached to the territory.

```
Steps and Sections

Step ID  CREDIT          Step Order   100

    SECTION : CRD              TXN TYPE: EORD              LEVEL: 100
              IF ( ORDER.TRANSACTION_TYPE = "ORD" , ProcessInSection ( "CRDORD"))
              IF ( ORDER.TRANSACTION_TYPE = "ADJ" , ProcessInSection ( "CRDORD"))
              IF ( ORDER.TRANSACTION_TYPE = "SHP" , ProcessInSection ( "CRDSHP"))

    SECTION : CRDORD           TXN TYPE: EORD              LEVEL: 998
              CREDIT_PCT = IF ( ORDER.SOURCE_CD = "3RDPTY" , 0.25 * 0.5 , 0.5)
              ORDER.PERF_MEASURE = "PROD_REV"
              ORDER.BASE_AMT = ORDER.SALES_AMOUNT
              ORDER.CREDIT_FACTOR_PCT = CREDIT_PCT
              CREDIT_AMT = ORDER.BASE_AMT * CREDIT_PCT
              Credit ( CREDIT_AMT)
              If ( ORDER.NEW_ACCOUNT_FLG = "Y" , DupTxn ( "NEW_ACCTS" , "BONUS" , 100 ,
              CREDIT_AMT))
              HoldForShip ( DupTxn ( "PROD_REV" , "COM1" , 110 , CREDIT_AMT))
              Promote ( 200)

    SECTION : CRDSHP       TXN TYPE: EORD     PERF MEASURE: PROD_REV      LEVEL: 998
              ReleaseByShip ( )
              Promote ( 600)

    SECTION : UPDTSHP      TXN TYPE: EORD     PERF MEASURE: PROD_REV      LEVEL: 110
              ORDER.CREDIT_DT = PeriodEndDt ( )
              Promote ( 200)
```

Plan Rules page (2 of 7)

```
    SECTION : CRDOPP           TXN TYPE: EOPT              LEVEL: 100
              OPPORTUNITY.PERF_MEASURE = "PROD_REV"
              Credit ( OPPORTUNITY.BASE_AMT)
              Promote ( 300)

    SECTION : CRDNEW       TXN TYPE: EORD     PERF MEASURE: NEW_ACCTS     LEVEL: 100
              Credit ( 1 UNT)
              Promote ( 200)

    SECTION : CRDRNK


Step ID  ROLLUP          Step Order   200

    SECTION : ROLLUP       TXN TYPE: EORD     PERF MEASURE: PROD_REV      LEVEL: 200
              Rollup ( "MANAGER1" , "Layer" , "Region" , "UPTO" , 300 , "PROD_REV" )
              Promote ( 300)

    SECTION : ROLLUP_NA    TXN TYPE: EORD     PERF MEASURE: NEW_ACCTS     LEVEL: 200
              Rollup ( "MANAGER1" , "Layer" , "Region" , "UPTO" , 300 , "NEW_ACCTS" )
              Promote ( 300)
```

Plan Rules page (3 of 7)

The Credit processing step contains these sections:

CRD - Credit Routing	Checks the transaction type and sends the transaction to the appropriate section.
	The transaction processing state = 100 (Ready for Credit).
CRDORD - Credit Orders	Splits the credit. Fifty percent of the order is paid in the same calendar period as it is earned. Fifty percent of the order is processed through to payment,

but the payment is not released until the order is shipped. The release may occur in the period it is earned or in any subsequent period. Two credits are credited for each order line. The credit is different for third-party sales (only 25 percent of the sales amount).

The transaction processing state = 998 (Continue) because this section is only reached from the ProcessInSection formula. At the end of this section, the transaction is promoted to state 200.

CRDSHP - Credit Shipments

Releases a transaction that was previously held pending shipment event. The transaction processing state = 998 (Continue) because this section is only reached from the ProcessInSection formula in the CRDORD section. The "triggering" shipment transaction is promoted to 600 (Complete) to ensure that it is not processed further. The released credit is processed further in the UPDTSHP section.

At the end of this section, the transaction is promoted to state 600.

UPDTSHP - Update Shipment Transactions

The shipment credit was set to transaction state 110 when it was placed on hold. The credit date was duplicated from the Order portion of the credit. In this section, the credit date is updated to match the date on which it was released, rather than the date on which it was placed on hold.

The transaction processing state = 110 (Held for Shipment). At the end of this section, the transaction is promoted to state 200.

CRDOPP - Credit Opportunities

This section, similar to CRDORD, processes opportunities rather than orders. Opportunity transactions (from CRM) differ from order transactions in that they do not contain the same fields (such as the third-party flag) and opportunities are not "held for shipment." This section gives participants a rough estimate of total credit, should the opportunity be converted to an actual order.

The transaction processing state = 100. At the end of this section, the transaction is promoted to state 300.

CRDNEW - Credit New Accounts

The CRDORD section processes the orders and duplicates any orders that are designated as new accounts. The duplicate transaction is tagged with Performance Measure = NEW_ACCTS and then processed further in this section.

The transaction processing state = 100. At the end of this section, the transaction is promoted to state 200.

CRDRNK - Credits based on SIs Rep Rank (credits based on sales representative rank)

This section is delivered as a placeholder, to allow for incentive plan configuration.

The Rollup processing step contains these sections:

ROLLUP - Rollup

Rolls up to all sales managers above the current territory, and stops when the region territory node is reached.

The transaction processing state = 200 (Ready for Rollup). At the end of this section, the transaction is promoted to state 300. The rolled-up transaction is processed as input to the sales manager plan.

ROLLUP_NA - Rollup New Accounts   Similar to the ROLLUP section, this section rolls up transactions that were duplicated to designate new accounts. This section is used in the sales manager plan to calculate the manager's new account bonus. At the end of this section, the transaction is promoted to state 300.

Plan Rules page (4 of 7)

The rate is based on a level of attainment compared to an annual quota for each sales representative. Use this matrix to determine commission rates:

Attainment % Low	Attainment % High	Commission Rate
0.000%	99.9999%	1.00
100.000%	109.999999%	1.50
110.000%	119.999999%	2.00
120.000%	Over	3.00

The incentive plan uses the COMMISSION-RT-REP settings on the Commission Tables page (Compensation, Sales Incentives, Define Plans, Commission Tables) to find the appropriate commission rate for a transaction.

Each individual credit transaction must be compared against quota to determine attainment level. The rates apply to prorated transaction amounts; when sales reach the attainment level, the credit amount is broken up and the balance over that level is paid at the new or accelerated rate.

This example uses the PSR-IP incentive plan to calculate commission:

1. The YTD attainment up to period 6 for product representative 49268 is 190,000.00 USD.

    The annual quota is 200,000.00 USD. In period 7, this representative has a shipped order for 20,000.00 USD.

2. The first half of the invoice would be paid at 1.00% = 10,000.00 USD × 1.00 = 100.00.00 USD.

3. The second half of the invoice would be paid at 1.50% = 10,000.00 USD × 1.50 = 150.00.00 USD.

4. The total payout for this invoice = 250.00 USD.

The Commission processing step contains these sections:

COMORD - Commission for Orders	Calculates the commission and promotes the transaction state to Ready for Payout (400). This section also calculates the attainment percent for reporting purposes.
COMOPP - Commission for Opportunities	Similar to the COMORD section, but processes opportunity transactions rather than order transactions. Calculates the commission and promotes the transaction to Ready for Payout (400). This section also calculates the attainment percent for reporting purposes.


```
Step ID  NEW_ACCT     Step Order   400

    SECTION : NEWACCTAGG     TXN TYPE: EORD     PERF MEASURE: NEW_ACCTS     LEVEL: 300
                    NEW_ACCTS_ATTAIN = ORDER.CREDIT_AMT
                    Promote ( 400)

Step ID  QTR_BONUS    Step Order   500

    SECTION : QTRBONUS
                    BONUS_AMOUNT = Commission ( "QTR_BONUS_REP" ,
                    RGN_PROD_REV_ATTAIN_Q , 0 , RGN_PROD_REV_QUOTA_Q)
                    BONUS_PAYOUT_Q = IF ( Person.HIRE_DT <= PeriodEndDt ( ) , BONUS_AMOUNT ,
                    0)

Step ID  YRLY_BONUS   Step Order   600

    SECTION : YRLYBONUS
                    BONUS_AMOUNT_Y = Commission ( "ANNUAL_BONUS_REP" ,
                    RGN_PROD_REV_ATTAIN_Y , 0 , RGN_PROD_REV_QUOTA_Y)
                    BONUS_PAYOUT_Y = IF ( Person.HIRE_DT <= PeriodEndDt ( ) ,
                    BONUS_AMOUNT_Y , 0)
```

Plan Rules page (5 of 7)

New account incentives are paid based on the following matrix for each month:

Number of New Accounts	Amount per New Account in Range
1–10	100
11–20	200
21+	300

The New Accounts processing step contains this section:

NEWACCTAGG - New Accounts Aggregation   Increments the New Account variable (credit = 1) and promotes the transaction state to 400. Individual transactions are carried forward for reporting. Variables are used to calculate actual payout.

The QTR_BONUS_REP Commission table is used to determine the quarterly bonus payout amount and the ANNUAL_BONUS_REP Commission table is used to determine the annual bonus payout amount. Each product sales representative is paid this team bonus based upon the quarterly or annual attainment percentage.

This example uses the PSR-IP incentive plan to calculate quarterly bonus:

1. The quarterly quota for all product revenue is 5,000,000.00 USD for the region.

2. The attainment for all sales for the quarter = 5,763,000.00 USD.

3. Quarterly attainment % = 115.26% or (5,763,000 / 5,000,000 × 100).

4. The payout bonus for each product representative = 1,000.00.00 USD.

The Quarterly Bonus processing step contains this section:

QTRBONUS - Calculate Quarterly Bonus   Quarterly bonus is based on regional attainment percent. Participants with a hire date less than or equal to the quarter end date receive the bonus payout. This section calculates the amount of the bonus.

The Yearly Bonus processing step contains this section:

YRLYBONUS - Calculate Annual Bonus   Annual bonus is based on regional attainment percent. Participants with a hire date less than or equal to the quarter end date receive the bonus payout. This section calculates the amount of the bonus.

```
Step ID  PAYOUT_M      Step Order   700

   SECTION : PAYMTHCOM       TXN TYPE: EORD     PERF MEASURE: PROD_REV      LEVEL: 400
                  Payout ( "COM1" , ORDER.COMP_AMT)
                  Promote ( 500)
   SECTION : PAYMTHNA        TXN TYPE: EORD     PERF MEASURE: NEW_ACCTS     LEVEL: 400
                  Payout ( "BONUS" , 0)
                  Promote ( 600)
   SECTION : PAYMTHNACT
                  NEW_ACCTS_PAYOUT_MTHLY = Commission ( "M_NEW_ACCT_REP" ,
                  NEW_ACCTS_ATTAIN_M , 0 , )
                  CreateTxn ( "NEW_ACCTS" , "BONUS" , NEW_ACCTS_PAYOUT_MTHLY , 500)

Step ID  PAYOUT_Q      Step Order   800

   SECTION : PAYQTRBNS
                  CreateTxn ( "PROD_REV" , "BONUS" , BONUS_PAYOUT_Q , 500)

Step ID  PAYOUT_Y      Step Order   900

   SECTION : PAYYRLYBNS
                  CreateTxn ( "PROD_REV" , "BONUS" , BONUS_PAYOUT_Y , 500)
```

Plan Rules page (6 of 7)

The Monthly Payout processing step contains these sections:

PAYMTHCOM - Monthly Commission Payouts   Creates a payout transaction with payment code of COM1. The transaction processing state = 400 (Ready for Payout). At the end of this section, the transaction is promoted to state 500.

PAYMTHNA - Monthly New Account Payout   Creates payout transactions for all individual new account transactions (for reporting). The amount = zero because the actual bonus is calculated on the aggregated amount.

At the end of this section, the transaction is promoted to state 600.

PAYMTHNACT - New Account Payout   Using the total of new accounts, looks up the value in the M_NEW_ACCT_REP Commission table and returns the payout amount for new accounts bonus.

The Quarterly Payout processing step contains these sections:

PAYQTRBNS - Create Quarterly Bonus Payout   Takes the bonus calculated in a previous section (QTRBONUS) and creates a payout transaction.

The Annual Payout processing step contains these sections:

PAYYRLYBNS - Create Annual Bonus Payout   Takes the bonus calculated in a previous section (YRLYBONUS) and creates a payout transaction.

Plan Rules page (7 of 7)

The PAY_CLUB step has no incentive plan rules and is therefore only an example without any processing tied to it. The top 100 ranked representatives throughout the business unit receive the following benefits upon entering the sales club. The product sales representative must exceed quota to be eligible for the sales club.

This table lists sales club ranks and rewards:

High Ranking	Low Ranking	Sales Retreat Trip	Briefcase	Bonus
1	25	Yes	Yes	500.00 USD
26	75	Yes	Yes	None
76	100	Yes	No	None

The High-Tech and Industrial market template includes sample Lookup tables to determine sales club achievement. The PSR-IP plan is not preconfigured with logic to calculate the payouts, because the criteria are unique to your implementation. In this example, sales club achievement is based on sales representative ranking. To calculate the payout, a ranking transaction must be fed to the system. This example is included to demonstrate the features of Lookup tables.

In this example, sales representatives are ranked from 1 to 100. Based on ranking, the sales representative can receive up to three payouts:

- Sales representatives ranked from 76 to 100 are eligible to attend the sales trip.

  The payouts for the sales trip are demonstrated in the template data by lookup table CLUB.

- Sales representatives ranked from 26 to 75 are eligible to receive a briefcase in addition to a trip.

  In this way you can calculate nonmonetary incentives. The payouts for the briefcase are demonstrated in the template data by lookup table BRIEFCASE.

- Finally, sales representatives ranked from 1 to 25 are eligible for the briefcase, the trip, and a 500.00 USD bonus.

  The payouts for the bonus are demonstrated in the template data by lookup table RANKING_BONUS.

There is no processing involved with the Payout Club step in the PSR-IP plan.

The Post Monthly Ledger processing step contains these sections:

PSTMTHLED - Post Monthly Ledger	Posts all payouts to the ledger.
DRAW - Apply Draw	Applies draws to payouts that were posted to the ledger.
POSTDRAW - Post Monthly Ledger	Posts draws to the ledger.

The Post Quarterly processing step contains these sections:

POST_Q - Post to Ledger	Posts quarterly payouts to the ledger.

Note. Monthly, quarterly, and annual steps are all included in one plan, but there are multiple jobs defined using this plan. A monthly job (PROD_REP_M) only runs the monthly steps, a quarterly job (PROD_REP_Q) only runs the quarterly steps, and an annual job (PROD_REP_Y) only runs the annual steps.

The Post Annual processing step contains these sections:

POST_Y - Post to Ledger   Posts annual payouts to the ledger.

The PSR-IP plan contains these performance measures tied to the specified variables:

Plan Definition page (1 of 3)

▽ **QTR_REGION - Quarterly Region**

*Section ID QTR_REGION   ***Description** Quarterly Region

Performance Measure Section Members   First ◁ 1-4 of 4 ▷ Last

Description	Variable Name	
Quota		🔍
Attainment		🔍
% Attained	RGN_PROD_REV_ATTAIN_PCT_QTD	🔍
Payout		🔍

▽ **ANN_REGION - Annual Region**

*Section ID ANN_REGION   ***Description** Annual Region

Performance Measure Section Members   First ◁ 1-4 of 4 ▷ Last

Description	Variable Name	
Quota		🔍
Attainment		🔍
% Attained	RGN_PROD_REV_ATTAIN_PCT_YTD	🔍
Payout		🔍

Plan Definition page (2 of 3)

Plan Definition page (3 of 3)

Reviewing the Service Sales Representative Plan

Service sales representatives are assigned to the SSR-IP incentive plan. The service sales representative plans differ from product sales representative plans in minor details:

- They are eligible for different product category sales (product versus service).

- The 50 percent held credit is paid out on different events (shipment versus invoicing).

This section provides an overview of the SSR-IP incentive plan and discusses the SSR-IP incentive plan structure.

Understanding the SSR-IP Incentive Plan

Here are some high-level characteristics of this incentive plan:

- The plan is for employees who are service field sales representatives for all territories in any region, within the U.S.

- Salespeople under this plan are paid based on two key performance measures: service revenue and new accounts.

- Transactions generating credits must belong to the participant's territory.

- Service commissions are calculated by multiplying earned credits of the performance measure by a rate.

The rate is based on level of attainment compared to annual quota for each sales representative.

- New accounts incentives are paid based on the number of new accounts opened in the salesperson's geographic territory.

- A bonus is paid quarterly and annually if all sales exceed the service (cumulated) quota amount for the quarter or year at the region level.

All representatives receive the bonus if the goal is surpassed.

Transactions and Credits

For service revenue commission, credits are generated for transactions that fit the following criteria:

- For transactions with a performance category of Service Revenue, when transaction type = Order, provide 50 percent of sales amount as credit to the territory or salesperson, with an immediate pay status.

- For transactions with a performance category of Service Revenue, when transaction type = Order, provide 50 percent of sales amount as credit to the territory or salesperson, with a held status that waits for the order to be invoiced prior to payment.

- For transactions such as adjustments and reversals, appropriate credits should be given or taken back.

For these transactions, commission rate is based on an attainment matrix. In other words, commission rate can change on a transaction-by-transaction basis. Commission rate is determined at the time of credit generation. The SSR-IP incentive plan uses a Commission table to find the appropriate commission rate.

- For new accounts incentives, credits are generated for transactions that fit the following criteria.

For transactions with a type of Order, if the new account flag is selected, then provide one credit to the territory or salesperson.

Note. For this credit, you ignore the performance measure, under the policy that the salesperson is involved in the opening of new accounts in his or her territory, regardless of the kind of sales being achieved with the account.

- For reversal or cancellation of an order, take back the associated credit for the original order as long as the original order was in the current fiscal year.

If the sales channel used for an order in the salesperson's territory is Third Party, the sales representative receives only 25 percent of the normal credit. This compensates for channel conflict.

SSR-IP Incentive Plan Structure

The SSR-IP plan is similar to the PSR-IP plan. This section provides a summary of the SSR-IP plan and explains the Credit step, where the SSR-IP plan processing differs from PSR-IP. The SSR-IP plan also differs from PSR-IP in these general ways:

- SSR-IP plan variable names relate to services (SVC), not products (PROD).

- The SSR-IP plan performance measure is service revenue (SRVC_REV), not product revenue (PROD_REV).

Plan Rules | Variables | Plan Usage

Plan Rules Summary

Service Sales Rep Plan

Plan ID SSR-IP   **Template** SSR-IP-T   **SetID** SHARE   **Effective Date** 01/01/2001

View Information as of Date

Specify Date 11/12/2004 📅   [Refresh]

Allocations

RORD	AND (RawOrderTransaction.PROD_EIM_KEY ISIN Product["SERVICES"].EIM_KEY , OR (RawOrderTransaction.TRANSACTION_TYPE ="ORD" , RawOrderTransaction.TRANSACTION_TYPE = "INV" , RawOrderTransaction.TRANSACTION_TYPE = "ADJ"))

Plan Rules page (1 of 3)

This plan is based on the SSR-IP-T template. The plan is designed to pay a monthly commission and new account bonuses. It also pays a business unit bonus quarterly and annually. This plan's allocation rule allocates orders, shipments, and adjustments where the product ID matches the Services reference object group attached to the territory.

Steps and Sections

Step ID CREDIT   **Step Order** 100

SECTION : CRD   **TXN TYPE: EORD**   **LEVEL: 100**

IF (ORDER.TRANSACTION_TYPE = "ORD" , ProcessInSection ("CRDORD"))
IF (ORDER.TRANSACTION_TYPE = "ADJ" , ProcessInSection ("CRDORD"))
IF (ORDER.TRANSACTION_TYPE = "INV" , ProcessInSection ("CRDINV"))

SECTION : CRDORD   **TXN TYPE: EORD**   **LEVEL: 998**

CREDIT_PCT = IF (ORDER.SOURCE_CD = "3RDPTY" , 0.25 * 0.5 , 0.5)
ORDER.PERF_MEASURE = "SRVC_REV"
ORDER.BASE_AMT = ORDER.SALES_AMOUNT
ORDER.CREDIT_FACTOR_PCT = CREDIT_PCT
CREDIT_AMT = ORDER.BASE_AMT * CREDIT_PCT
Credit (CREDIT_AMT)
If (ORDER.NEW_ACCOUNT_FLG = "Y" , DupTxn ("NEW_ACCTS" , "BONUS" , 100 , CREDIT_AMT))
HoldForInv (DupTxn ("SRVC_REV" , "COM2" , 110 , CREDIT_AMT))
Promote (200)

SECTION : CRDINV   **TXN TYPE: EORD**   **PERF MEASURE: SRVC_REV**   **LEVEL: 998**

ReleaseByInv ( )
Promote (600)

Plan Rules page (2 of 3)

```
SECTION : UPDTINV        TXN TYPE: EORD        PERF MEASURE: SRVC_REV        LEVEL: 110
                ORDER.CREDIT_DT = PeriodEndDt ( )
                Promote ( 200)
SECTION : CRDOPP                        TXN TYPE: EOPT                    LEVEL: 100
                OPPORTUNITY.PERF_MEASURE = "SRVC_REV"
                Credit ( OPPORTUNITY.BASE_AMT)
                Promote ( 300)
SECTION : CRDNEW        TXN TYPE: EORD        PERF MEASURE: NEW_ACCTS        LEVEL: 100
                Credit ( 1 UNT)
                Promote ( 200)
```

Plan Rules page (3 of 3)

The Credit processing step contains these sections:

CRD - Credit Routing	Checks the transaction type and sends the transaction to the appropriate section.
	The transaction processing state = 100 (Ready for Credit).
CRDORD - Credit Orders	Splits the credit. Fifty percent of the order is paid in the same calendar period as it is earned. Fifty percent of the order is processed through to payment, but the payment is not released until the order is shipped. The release may occur in the period it is earned or in any subsequent period. Two credits are credited for each order line. The credit is different for third-party sales (only 25 percent of the sales amount).
	The transaction processing state = 998 (Continue) because this section is only reached from the ProcessInSection formula. At the end of this section, the transaction is promoted to state 200.
CRDINV - Credit Invoices	Releases transactions that were previously held pending invoice event. The transaction processing state = 998 (Continue) because this section is only reached from the ProcessInSection formula in the CRDORD section. The "triggering" invoice transaction is promoted to 600 (Complete) so that it is not processed further. The released credit is processed further in the UPDTINV section.
	At the end of this section, the transaction is promoted to state 600.
UPDTINV - Update Invoice Credit Txns (transactions)	Updates the credit date on the invoice credit that was released from held status.
	At the end of this section, the transaction is promoted to state 200.
CRDOPP - Credit Opportunities	This section, similar to CRDORD, processes opportunities rather than orders. Opportunity transactions (from CRM) differ from order transactions in that they do not contain the same fields (such as the third-party flag) and opportunities are not "held for shipment." This section gives participants a rough estimate of total credit, should the opportunity be converted to an actual order.
	The transaction processing state = 100. At the end of this section, the transaction is promoted to state 300.
CRDNEW - Credit New Accounts	The CRDORD section processes the orders and duplicates any orders that are designated as new accounts. The duplicate transaction is tagged with Performance Measure = NEW_ACCTS and then processed further in this section.

At the end of this section, the transaction is promoted to state 200.

The SSR-IP plan contains the SRVC_REV performance measure and associated as opposed to the PROD_REV performance measure on the PSR-IP plan. Both plan uses the NEW_ACCTS performance measure.

The remainder of SSR-IP plan processing is the same as that in the PSR-IP plan other than the fact that it uses different variable names.

Reviewing the Sales Manager Plan

Sales managers are assigned to the SMGR-IP incentive plan. This section provides an overview of the SMGR-IP incentive plan and discusses the SMGR-IP incentive plan structure.

Understanding the SMGR-IP Incentive Plan

Here are some high-level characteristics of this incentive plan:

- Sales managers are associated with area units, which are in turn made up of a number of territories.

  The plan is for employees who are sales managers, for all areas in any region, within the U.S.

- Managers under this plan are paid based on the key performance measure of total revenue, which is made up of credits from product revenue and service revenue categories.

  In addition, sales managers have two other incentives calculated based on gross profit and new accounts.

- Transactions generating credits must belong to the participant's area or territories under the area.

- Revenue commissions are calculated by multiplying earned credits of the performance measures by a rate.

  The rate is based on level of attainment compared to annual quota for each sales manager.

- The new accounts quarterly bonus is paid based on the number of new accounts opened in the area manager's geographic territory.

  It is compared against a new account quota for the sales manager.

- A bonus is paid quarterly and annually if all sales exceed the total (cumulated) quota amount for the quarter or year at the region level.

  All managers receive the bonus if the goal is surpassed.

Transactions and Credits

Sales managers receive the same credit as their salespeople, with the same rules of crediting and release for payments. For that reason the crediting rules specified at the sales representative level are not repeated here.

Sales managers receive a dollar of credit for each dollar of credit that a salesperson under them receives, but the total credit for any individual transaction cannot be more than 100 percent of the transaction amount. Similarly, if a transaction generates credits such as new accounts credits, it should not double up the credit if multiple salespeople receive credit for the transaction.

For transactions such as adjustments and reversals, appropriate credits should be given or taken back. For these transactions, commission rate is based on an attainment matrix. In other words, the commission rate can change on a transaction-by-transaction basis. The commission rate is determined at the time of credit generation.

If the sales channel used for an order in the salesperson's territory is Third Party, then the sales representative receives only 25 percent of the normal credit. This compensates for channel conflict. The sales manager inherits the same credit.

SMGR-IP Incentive Plan Structure

This section provides a summary of the SMGR-IP plan and explains plan processing step by step.

Plan Rules page (1 of 6)

This plan is based on the SMGR-IP-T template. The plan is designed to pay monthly commission based on the total revenue for a manager's territory. It also pays a bonus for gross profit and new accounts throughout the territory. This plan has no allocation rules. All transactions fed into this plan come from rollups.

Plan Rules page (2 of 6)

```
SECTION : COMORD2     TXN TYPE: EORD     PERF MEASURE: SRVC_REV     LEVEL: 300
            NEW_ATTAIN = TOT_REV_ATTAIN_Y + ORDER.CREDIT_AMT
            TOT_REV_ATTAIN_PCT_YTD = IF ( TOT_REV_QUOTA_Y > 0 ,
            NEW_ATTAIN/TOT_REV_QUOTA_Y * 100 , 0)
            COMP_AMT = Commission ( "COMMISSION_RT_MGR" , ORDER.CREDIT_AMT ,
            TOT_REV_ATTAIN_Y , TOT_REV_QUOTA_Y)
            ORDER.COMP_AMT = IF ( ORDER.CHANL_EIM_KEY = "WEB" , COMP_AMT * 1.1 ,
            COMP_AMT)
            ORDER.QUOTA_AMOUNT = TOT_REV_QUOTA_Y
            ORDER.ATTAINMENT_AMT = NEW_ATTAIN
            ORDER.ATTAINMENT_PCT = TOT_REV_ATTAIN_PCT_YTD
            TOT_REV_ATTAIN = ORDER.CREDIT_AMT
            RGN_SVC_REV_ATTAIN = ORDER.CREDIT_AMT
            RGN_TOT_REV_ATTAIN = ORDER.CREDIT_AMT
            ORDER.PERF_MEASURE = "TTL_REV"
            ORDER.GROSS_PROFIT = ORDER.GROSS_MARGIN_PCT / 100 *
            ORDER.SALES_AMOUNT
            RGN_GRS_PRF_ATTAIN = ORDER.GROSS_PROFIT
            Promote ( 400 )
SECTION : NEWACCTAGG     TXN TYPE: EORD     PERF MEASURE: NEW_ACCTS     LEVEL: 300
            NEW_ACCTS_ATTAIN = ORDER.CREDIT_AMT
            Promote ( 400 )
```

Plan Rules page (3 of 6)

The COMMISSION_RT_MGR Commission table is used to determine commission rates.

This table lists commission criteria:

Attainment % Low	Attainment % High	Commission Rate
0.000%	99.9999%	0.25
100.000%	109.999999%	0.50
110.000%	119.999999%	0.75
120.000%	Over	1.00

Each individual credit transaction has to be compared against quota to determine attainment level. The rates apply to prorated transaction amounts; when amounts reach the level of attainment, the credit amount is broken up and the balance over that level is paid at the new or accelerated rate.

New account incentives are determined using the M_NEW_ACCT_MGR Commission table.

This table lists bonus criteria and amounts:

Attainment % Low	Attainment % High	Bonus Amount
0%	74.999%	0

Attainment % Low	Attainment % High	Bonus Amount
75.000%	99.999%	1,000.00 USD
100.000%	149.999%	2,000.00 USD
150.000%	Over	5,000.00 USD

The Commission processing step contains these sections:

CHKDUP1 - Check Duplicate Orders (Prod)	The CheckDupTxn formula ensures that the total credit amount is not greater than 100 percent, in the event that multiple product sales representatives below this manager received credit for the same transaction.
COMORD1 - Commission for Orders (PROD) (products)	Processes transactions that were rolled up from product sales representatives.
	The original performance measure (PROD_REV) is preserved during the rollup so that the SMGR-IP plan can update the appropriate regional totals. Once the totals are updated, the performance measure is changed to TTL_REV, as that is what is used by the sales manager plan. Gross profit is calculated to update regional gross profit totals. Gross profit variables are used by the regional manager plan.
	This section also calculates the attainment percent for reporting purposes.
	At the end of this section, the transaction is promoted to state 400.
CHKDUP2 - Check Duplicate Orders (Serv) (services)	The CheckDupTxn formula ensures that the total credit amount is not greater than 100 percent, in the event that multiple service sales representatives below this manager received credit for the same transaction.
COMORD2 - Commission for Orders (SERV) (services)	Processes transactions that were rolled up from service sales representatives.
	The original performance measure (SRVC_REV) is preserved during the rollup so that the SMGR-IP plan can update the appropriate regional totals. Once the totals are updated, the performance measure is changed to TTL_REV, as that is what is used by the sales manager plan. Gross profit is calculated to update regional gross profit totals. Gross profit variables are used by the regional manager plan.
	This section also calculates the attainment percent for reporting purposes.
	At the end of this section, the transaction is promoted to state 400.
NEWACCTAGG - Aggregate New Accounts	Compiles new account transactions that were rolled up from the PSR-IP and SSR-IP incentive plans.

```
Step ID  QTR_BONUS   Step Order   300

    SECTION : QTRBNS

              BONUS_AMOUNT = Commission ( "QTR_BONUS_MGR" ,
              RGN_TOT_REV_ATTAIN_Q , 0 , RGN_TOT_REV_QUOTA_Q)
              BONUS_PAYOUT_Q = IF ( Person.HIRE_DT <= PeriodEndDt ( ) , BONUS_AMOUNT ,
              0)
              RGN_TOT_REV_ATTAIN_PCT_QTD = IF ( RGN_TOT_REV_QUOTA_Q > 0 ,
              RGN_TOT_REV_ATTAIN_Q / RGN_TOT_REV_QUOTA_Q * 100 , 0)
              RGN_PROD_REV_ATTAIN_PCT_QTD = IF ( RGN_PROD_REV_QUOTA_Q > 0 ,
              RGN_PROD_REV_ATTAIN_Q / RGN_PROD_REV_QUOTA_Q * 100 , 0)
              RGN_SVC_REV_ATTAIN_PCT_QTD = IF ( RGN_SVC_REV_QUOTA_Q > 0 ,
              RGN_SVC_REV_ATTAIN_Q / RGN_SVC_REV_QUOTA_Q * 100 , 0)


Step ID  YRLY_BONUS   Step Order   400

    SECTION : YRLYBON

              BONUS_AMOUNT_Y = Commission ( "ANNUAL_BONUS_MGR" ,
              RGN_TOT_REV_ATTAIN_Y , 0 , RGN_TOT_REV_QUOTA_Y)
              BONUS_PAYOUT_Y = IF ( Person.HIRE_DT <= PeriodEndDt ( ) ,
              BONUS_AMOUNT_Y , 0)
              RGN_TOT_REV_ATTAIN_PCT_YTD = IF ( RGN_TOT_REV_QUOTA_Y > 0 ,
              RGN_TOT_REV_ATTAIN_Y / RGN_TOT_REV_QUOTA_Y * 100 , 0)
              RGN_GRS_PRF_ATTAIN_PCT_YTD = IF ( RGN_GRS_PRF_QUOTA_Y > 0 ,
              RGN_GRS_PRF_ATTAIN_Y / RGN_GRS_PRF_QUOTA_Y * 100 , 0)
              RGN_PROD_REV_ATTAIN_PCT_YTD = IF ( RGN_PROD_REV_QUOTA_Y > 0 ,
              RGN_PROD_REV_ATTAIN_Y / RGN_PROD_REV_QUOTA_Y * 100 , 0)
              RGN_SVC_REV_ATTAIN_PCT_YTD = IF ( RGN_SVC_REV_QUOTA_Y > 0 ,
              RGN_SVC_REV_ATTAIN_Y / RGN_SVC_REV_QUOTA_Y * 100 , 0)
```

Plan Rules page (4 of 6)

The QTR_BONUS_MGR Commission table is used to determine the quarterly bonus payout and the ANNUAL_BONUS_MGR Commission table is used to determine the annual bonus payout. Each sales manager is paid this team bonus based upon the QTD or YTD attainment percentage.

This table lists bonus criteria and amounts:

Attainment % Low (Products)	Attainment % High (Products)	QTD Bonus	YTD Bonus
0.000%	99.9999%	1,000.00 USD	2,000.00 USD
100.000%	109.999999%	2,000.00 USD	4,000.00 USD
110.000%	119.999999%	3,000.00 USD	6,000.00 USD
120.000%	Over	5,000.00 USD	10,000.00 USD

Here's an example of how the SMGR-IP plan calculates a quarterly bonus:

1. The QTD quota for all revenue is 5,000,000.00 USD for the region.

2. The attainment for all sales for the quarter = 5,763,000.00 USD.

3. QTD attainment % = 115.26 % or (5,763,000 / 5,000,000 × 100).

4. The payout bonus for each sales manager = 3,000.00 USD.

The Quarterly Bonus processing step contains this section:

QTRBNS - Calculate   Quarterly bonus is based on regional attainment percent. Participants with a
Quarterly Bonus   hire date less than or equal to the quarter end date receive the bonus payout.
                                This section calculates the amount of the bonus. This section also calculates
                                the attainment percent for reporting purposes.

The Yearly Bonus processing step contains this section:

YRLYBON - Calculate   Annual bonus is based on regional attainment percent. Participants with a hire
Annual Bonus   date less than or equal to the quarter end date receive the bonus payout. This
                                section calculates the amount of the bonus. This section also calculates the
                                attainment percent for reporting purposes.


```
Step ID  PAYOUT_M      Step Order  500

    SECTION : PAYOUT_M      TXN TYPE: EORD     PERF MEASURE: TTL_REV      LEVEL: 400
                        Payout ( "COM" , ORDER.COMP_AMT)
                        Promote ( 500 )

Step ID  PAYOUT_Q      Step Order  600

    SECTION : PAYQTRBNS
                        CreateTxn ( "TTL_REV" , "BONUS" , BONUS_PAYOUT_Q , 500)

    SECTION : PAYQTRNEW
                        NEW_ACCTS_PAYOUT_QTRLY = Commission ( "M_NEW_ACCT_MGR" ,
                        NEW_ACCTS_ATTAIN_Q , 0 , NEW_ACCTS_QUOTA_Q)
                        CreateTxn ( "NEW_ACCTS" , "BONUS" , NEW_ACCTS_PAYOUT_QTRLY , 500)

Step ID  PAYOUT_Y      Step Order  700

    SECTION : PAYYRLYBNS
                        CreateTxn ( "TTL_REV" , "BONUS" , BONUS_PAYOUT_Y , 500)
```

Plan Rules page (5 of 6)

The Monthly Payout processing step contains this section:

PAYOUT_M - Monthly   Creates a payout transaction using the amount calculated in the COMORD1
Payout   and COMORD2 sections.

                                At the end of this section, the transaction is promoted to state 500.

The Quarterly Payout processing step contains this section:

PAYQTRBNS - Create   Creates a payout transaction using the amount calculated in the QTRBNS
Quarterly Bonus Payout   section.

PAYQTRNEW - Create   Creates a payout transaction for the new account bonus.
Qtrly New Acct Bonus
(create quarterly new account
bonus)

The Annual Payout processing step contains this section:

PAYYRLYBNS - Create   Creates a payout transaction using the amount calculated in the YRLYBON
Annual Bonus Payout   section.

Plan Rules page (6 of 6)

The Post Monthly Ledger processing step contains these sections:

PSTMTHLED - Post   Posts all payouts to the ledger.
Monthly Ledger

DRAW - Apply Draw   Applies draws to payouts that were posted to the ledger.

PSTMTHLED2 - Post   Posts all draws to the ledger.
Monthly Ledger

The Post Quarterly processing step contains these sections:

POST_Q - Post to Ledger   Posts quarterly payouts to the ledger.

The Post Annual processing step contains these sections:

POST_Y - Post to Ledger   Posts annual payouts to the ledger.

Reviewing the Regional Sales Manager Plan

Regional sales managers are assigned to the RMGR-IP incentive plan. This section provides an overview of
the RMGR-IP incentive plan and discusses the RMGR-IP incentive plan structure.

Understanding the RMGR-IP Incentive Plan

Here are some high-level characteristics of this incentive plan:

- Regional sales managers are associated with region units, which are in turn made up of a number of areas.

  The plan is for employees who are regional sales managers for all regions, within the U.S.

- Managers under this plan are paid based on the key performance measure of total revenue, which is made up of credits from product revenue and service revenue categories.

  In addition, regional sales managers are paid an incentive calculated based on gross profit.

- Transactions generating credits must belong to the participant's region and units reporting into the region.

- Total revenue incentive is paid to the regional manager on a quarterly basis.

  This incentive is weighted at 50 percent of the target incentive for the manager. The YTD total revenue for the region is compared with the YTD quota for the region, and then the attainment percent is run through a matrix to calculate the incentive amount.

- Gross profit incentive is paid to the regional manager on a quarterly basis.

  This incentive is weighted at 50 percent of the target incentive for the manager. The YTD gross profit achievement for the region is compared against the YTD gross profit quota for the region, and then the attainment percent is run through a matrix to calculate the incentive amount.

- A bonus is paid quarterly and annually if all sales exceed the total (cumulated) quota amount for the quarter or year at the region level.

  All regional sales managers receive the bonus if the goal is surpassed. Regional sales managers must have started their employment within the quarter to qualify for the bonus. A matrix is used to determine the bonus payout amount. Each sales manager is paid this team bonus based upon the QTD or YTD attainment percentage.

Transactions and Credits

Regional sales managers receive the same credit as their sales managers, with the same rules of crediting and release for payments. For that reason the crediting rules specified at the employee level are not repeated here.

Regional sales managers receive a dollar of credit for each dollar of credit that a sales manager under them receives, but the total credit for any individual transaction cannot be more than 100 percent of the transaction amount.

For these transactions, incentive is determined based on total achievement instead of on a transaction-by-transaction basis. For transactions such as adjustments and reversals, appropriate credits should be given or taken back. Reversals and adjustments do not affect prior periods and instead are taken in the period they occur.

If the sales channel used for an order in the salesperson's territory is Third Party, then the sales representative receives only 25 percent of the normal credit. This compensates for channel conflict. The regional sales manager inherits the same credit.

Note. It is possible that different salesperson plans are set up with different credit percentages for these transactions.

Calculations

A key aspect of regional manager compensation is that the sales compensation is paid based on a target incentive for each person. Various incentive formulas use a weight against this target incentive to figure out the appropriate payout.

The annual target incentive is set at 100 percent of base salary of the regional sales manager.

RMGR-IP Incentive Plan Structure

This section provides a summary of the RMGR-IP plan and explains plan processing step by step.

Plan Rules page (1 of 4)

This plan is based on the RMGR-IP-T template. The plan is designed to pay monthly commission based on the total revenue for a manager's region. It also pays a bonus for gross profit throughout the region. This plan has no allocation rules. All transactions fed into this plan come from rollups.

Plan Rules page (2 of 4)

```
Step ID  YRLY_BONUS   Step Order   200

    SECTION : BU_BONUS2

                    BONUS_AMOUNT_Y = Commission ( "ANNUAL_BONUS_RMGR" ,
                    RGN_TOT_REV_ATTAIN_Y , 0 , RGN_TOT_REV_QUOTA_Y)
                    BONUS_PAYOUT_Y = IF ( Person.HIRE_DT <= PeriodEndDt ( ) ,
                    BONUS_AMOUNT_Y , 0)
```

Plan Rules page (3 of 4)

This table lists total revenue incentive criteria using the RMGR_COMMISSION_FCTR commission table:

Attainment % Low	Attainment % High	Calculation Factor
0.000%	99.9999%	25%
100.000%	124.999999%	100%
125.000%	149.999999%	150%
150.000%	Over	200%

Here is an example of how the RMGR-IP plan calculates revenue incentives:

1. Base salary for regional manager is 160,000.00 USD.

2. Annual target incentive = 100% of base salary = 160,000.00 USD.

3. At the end of Q1, the region had attained 75 percent of total revenue goals.

4. At the end of Q2, the region had attained 105 percent of total revenue goals.

Q1 payment for the regional sales manager would be:

• For 75 percent attainment, calculation factor is 50 percent.

• Target incentive × weight × calculation factor = 160,000.00 USD × 50% × 25% = 20,000.00 USD.

• Payout = current calculated amount – prior payments = 20,000.00 USD – 0 = 20,000.00 USD.

Q2 payment for the regional sales manager would be:

• For 105 percent attainment, calculation factor is 100 percent.

• Target incentive × weight × calculation factor = 160,000.00 USD × 50% × 100% = 80,000.00 USD.

• Payout = current calculated amount – prior payments = 80,000.00 USD – 20,000.00 USD = 60,000.00 USD.

This table lists gross profit incentive criteria using the RMGR_COMMISSION_FCTR commission table:

Attainment % Low	Attainment % High	Calculation Factor
0.000%	99.9999%	25%

Attainment % Low	Attainment % High	Calculation Factor
100.000%	124.999999%	100%
125.000%	149.999999%	150%
150.000%	Over	200%

Here's an example of how the RMGR-IP plan calculates gross profit incentives:

1. Base salary for regional manager is 160,000.00 USD.

2. Annual target incentive = 100% of base salary = 160,000.00 USD.

3. At the end of Q1, the region had attained 105 percent of gross profit goals.

4. At the end of Q2, the region had fallen back to 95 percent of gross profit goals.

Q1 payment for the regional sales manager would be:

• For 105 percent attainment, calculation factor is 100 percent.

• Target incentive × weight × calculation factor = 160,000.00 USD × 50% × 100% = 80,000.00 USD.

• Payout = current calculated amount – prior payments =80,000.00 USD – 0 = 80,000.00 USD.

Q2 payment for the regional sales manager would be:

• For 95 percent attainment, calculation factor is 25 percent.

• Target incentive × weight × calculation factor = 160,000.00 USD × 50% × 25% = 25,000.00 USD.

• Payout = current calculated amount – prior payments = 20,000.00 USD – 80,000.00 USD = –60,000.00 USD.

Note. Attainment percent is cumulative and can go up and down during the year. Calculation must be able to accommodate this, so that at the end of the year the right amount has been paid out.

This table lists business unit bonus criteria and amounts:

Attainment % Low (Products)	Attainment % High (Products)	QTD Bonus	YTD Bonus
0.000%	99.9999%	0	0
100.000%	109.999999%	5,000.00 USD	10,000.00 USD
110.000%	119.999999%	7,000.00 USD	15,000.00 USD
120.000%	Over	9,000.00 USD	20,000.00 USD

Here's an example of how the RMGR-IP plan calculates bonuses:

1. The QTD quota for all revenue is 5,000,000.00 USD for the region.

2. The attainment for all sales for the quarter = 5,763,000.00 USD.

3. QTD attainment % = 115.26 % or (5,763,000 / 5,000,000 × 100).

4. The payout bonus for each regional sales manager = 7,000.00 USD.

The Quarterly Bonus processing step contains these sections:

TOT_REV - Total Revenue Incentive	The total target incentive = annual salary. Half of the target incentive is for the total revenue, and half is for the gross profit (next section). Using the regional variables for total revenue attainment and quota, determine the calculation factor. Multiply the target total revenue incentive by the calculation factor to get the quarterly payout. Subtract previous payouts (from previous monthly calculations) to pay out only the incremental amount this month.
GROSS_PRF - Gross Profit Incentive	Using the regional variables for gross profit attainment and quota, determine the calculation factor. Multiply the target gross profit incentive by the calculation factor to get the quarterly payout. Subtract previous payouts (from previous monthly calculations) to pay out only the incremental amount this month.
BU_BONUS1 - Business Unit Bonus - Qtrly (quarterly)	Quarterly bonus is based on regional attainment percent. Participants with a hire date less than or equal to the quarter end date receive the bonus payout. This section calculates the amount of the bonus.

The Yearly Bonus processing step contains this section:

BU_BONUS2 - Business Unit Bonus - Annual	Annual bonus is based on regional attainment percent. Participants with a hire date less than or equal to the quarter end date receive the bonus payout. This section calculates the amount of the bonus.

```
Step ID  PAYOUT_Q      Step Order   300

   SECTION : PAYTOTREV
                CreateTxn ( "TTL_REV" , "COM" , TOT_REV_PAYOUT_Q , 500)
   SECTION : PAYGP
                CreateTxn ( "GROSS_PRF" , "COM" , GRS_PRF_PAYOUT_Q , 500)
   SECTION : PAYQTRBNS
                CreateTxn ( "TTL_REV" , "BONUS" , BONUS_PAYOUT_Q , 500)

Step ID  PAYOUT_Y      Step Order   400

   SECTION : PAYYRLYBNS
                CreateTxn ( "TTL_REV" , "COM" , BONUS_PAYOUT_Y , 500)

Step ID  POST_Q        Step Order   500

   SECTION : POST_Q
                Post ( )

Step ID  POST_Y        Step Order   600

   SECTION : POST_Y
                Post ( )
```

Plan Rules page (4 of 4)

The Quarterly Payout processing step contains these sections:

PAYTOTREV - Total Revenue Payout	Creates a payout transaction using the amount calculated in the TOT_REV section.
PAYGP - Gross Profit Payout	Creates a payout transaction using the amount calculated in the GROSS_PRF section.
PAYQTRBNS - Qtrly Business Unit Bonus (quarterly business unit bonus)	Creates a payout transaction using the amount calculated in the BU_BONUS1 section.

The Annual Payout processing step contains this section:

PAYYRLYBNS - Create Annual Bonus Payout	Creates a payout transaction using the amount calculated in the BU_BONUS2 section.

The Post Quarterly processing step contains this section:

POST_Q - Post to Ledger	Posts quarterly payouts to the ledger.

The Post Annual processing step contains this section:

POST_Y - Post to Ledger	Posts annual payouts to the ledger.

CHAPTER 9

Reporting

This chapter provides an overview of High-Tech and Industrial (HTI) reporting and discusses:

- Compensation administrator reports.
- UIO groups.
- Participant UI Crystal reports.
- Participant UI static page reports.
- Participant UI configurable page reports.
- Predefined queries.
- Reviewing HTI participant reports.

Understanding HTI Reporting

The HTI market template leverages the sales incentive management (SIM) Participant UI Framework. The PeopleSoft system delivers some participant reports and also provides tools for compensation administrators to configure participant reports based on user interaction objects (UIOs) to meet their needs. All compensation nodes with participant relationships include a user interaction assignment. The GBIBU compensation structure uses the delivered UIO reports to specify your participants' access to results data. The GBIBU compensation structure uses delivered user interaction groups to specify your participants' access to results data. GBIBU uses the following user interaction groups: 100000 (Standard Manager homepage), 200000 (Standard Non-Manager homepage), and 300000 (Limited Participant Reporting). Alternatively, you can assign user interaction reports and pages individually to each participant relationship in your compensation structure. You may use the delivered UIO reports and user interaction groups or create your own. Participants can then access all of their reports (both delivered and configured) through links on the My Sales Compensation page.

In addition, PeopleSoft delivers compensation administrator reports accessible through the main menu navigation of the database.

The appendix of the *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* lists delivered compensation administrator and participant reports that apply to the HTI market template and other market templates as well as those that apply to the entire SIM system.

Compensation Administrator Reports

Sales Incentive Management delivers the following reports for compensation administrators for use with the HTI market template:

Report ID	Report Name
EISIHCA0, EISIHCAP, EISIHCAT	Compensation Analysis
EISIHTC0	Transaction Life Cycle
EISIHCPM, EISIHCPP	Plan Summary

To access the report run pages, navigate to Compensation, Sales Incentives, Review Incentive Information. The Reports appendix in the *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* describes each of these reports.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Sales Incentive Management Reports," Compensation Administrator Reports

UIO Groups

UIO groups are groups of page, report, and configurable UIOs. You can assign UIO groups to participants through a participant relationship on compensation structures. Alternatively, you can assign user interaction reports and pages individually to each participant relationship in your compensation structure.

This table lists the delivered UIO groups for the HTI market template and their use on the sample GBIBU compensation structure:

Group ID	Description	Usage
100000	Standard Manager Home Page	Used on the root, WESTERN, EASTERN MIDWEST, and CENTRAL US200 nodes.
20000	Compensation Snapshot	Not used directly on any nodes. Part of the UIO groups Standard Manager Home Page (Group ID 100000), Standard Non-Mgr Home Page (Group ID 200000), and Limited Participant Rptg (Group ID 300000).
200000	Standard Non-Mgr Home Page	Used on the BAY_AREA, NORTHERN_CA, SACRAMENTO, LOS_ANGELES, SOUTHERN_CA, SAN_DIEGO, EAST_COAST, BALBOA, CENTRAL US200, and CENTRAL US300 nodes.
30000	Projected Snapshot	Not used directly on any nodes. Not part of any delivered UIO groups.
300000	Limited Participant Rptg (reporting)	Used on the MIDWEST node.

Group ID	Description	Usage
40000	Sales Force	Not used directly on any nodes. Part of the UIO group Standard Manager Home Page (Group ID 100000).
45000	Manager Reports	Not used directly on any nodes. Part of the UIO group Standard Manager Home Page (Group ID 100000).
45001	Participant Reports	Not used directly on any nodes. Part of the UIO group Standard Non-Mgr Home Page (Group ID 200000).
50000	Problem Reporting	Not used directly on any nodes. Part of the UIO groups Standard Manager Home Page (Group ID 100000), Standard Non-Mgr Home Page (Group ID 200000), and Limited Participant Rptg (Group ID 300000).
68000	Search Utility	Not used directly on any nodes. Part of the UIO groups Standard Manager Home Page (Group ID 100000) and Standard Non-Mgr Home Page (Group ID 200000).

Participant UI Crystal Reports

PeopleSoft delivers the following participant UI Crystal reports for the HTI market template:

UIO ID	Description	Usage
4500	Participant Commission Statement	Not used directly on any nodes. Part of the UIO group Participant Reports (Group ID 45001).
4501	Credits Report	Not used directly on any nodes. Part of the UIO groups Manager Reports (Group ID 45000) and Participant Reports (Group ID 45001).

UIO ID	Description	Usage
4502	Sales Force Commission Statement	Not used directly on any nodes. Part of the UIO group Manager Reports (Group ID 45000).
4504	Indirect Credits Report	Not used directly on any nodes. Part of the UIO group Manager Reports (Group ID 45000).
4505	Manager Unpaid Credits Report	Not used directly on any nodes. Part of the UIO group Manager Reports (Group ID 45000).
4506	Participant Unpaid Credits	Not used directly on any nodes. Part of the UIO group Participant Reports (Group ID 45001).

Participant UI Static Page Reports

PeopleSoft delivers the following participant UI static page reports for the HTI market template:

UIO ID	Description	Usage
2000	Compensation Snapshot	Not used in the delivered GBIBU compensation structure.
3000 (inactive)	Projected Compensation	Not used directly on any nodes. Part of the UIO group Projected Snapshot (Group ID 30000).
4000	Sales Force	Not used in the delivered GBIBU compensation structure.
5000	General Problem Reporting	Not used directly on any nodes. Part of the UIO group Participant Reports (Group ID 50000).
6800	Search Utility	Not used directly on any nodes. Part of the UIO group Search Utility (Group ID 68000).
6900	Subordinates Plan Summary	Not used directly on any nodes. Part of the UIO group Sales Force (Group ID 40000).

Participant UI Configurable Page Reports

PeopleSoft delivers the following participant UI configurable page reports for the HTI market template:

UIO ID	Description	Usage
6000	Compensation Snapshot	Used on the WESTERN node. Part of the UIO group Compensation Snapshot (Group ID 20000).
6500	Sales Force Snapshot - Sales Force Summary	Not used directly on any nodes. Part of the UIO group Sales Force (Group ID 40000).

Predefined Queries

PeopleSoft delivers predefined queries for the HTI market template. To access the report run pages, navigate to Compensation, Sales Incentives, Review Incentive Information. The Reports appendix in the *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* describes each of these predefined queries.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Sales Incentive Management Reports," Compensation Administrator Reports

Reviewing HTI Participant Reports

The PeopleSoft system delivers some participant reports and also provides tools for compensation administrators to configure reports to meet their needs. Compensation administrators can create configurable reports using the User Interaction - Configurable page. Participants can then access all of their reports (both delivered and configured) through links on the My Sales Compensation page.

The appendix of the *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook* lists delivered participant reports that apply to the HTI and BCM market templates as well as those that apply to the entire Sales Incentive Management system.

See Also

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing User Interaction Objects"

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Managing the Participant Reporting Interfaces"

PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook, "Sales Incentive Management Reports"

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template
In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity
In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage
In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar
In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function
In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type
In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement
In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule
In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account
A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database
In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

billing career In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.
	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.
	See also *course.*
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.
	See also *population* and *division.*
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See *communication key.*
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
	In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.
	See also *class*.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them.
	For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides

default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type
In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree
In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division
In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing
A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree
A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table
A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date
A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger
Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set
In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event
In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization
In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit
In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.
	In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for *general ledger business unit*. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.
	See also *business unit*.
GL entry template	Abbreviation for *general ledger entry template*. In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled

by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process   Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group   In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object   In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule   In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur   In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative   In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access   In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution   In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

item   In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle   In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.
	See also *3C engine*.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.

national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis*.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects.
	See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.
	See also *division* and *cohort*.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the

	number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.
	In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag*. Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for *record output value-added tax flag*.
	See *record input VAT flag*.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.
	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See *communication key.*
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
3C engine	Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,

and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group　Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan　A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage　In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation　In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state　In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table　A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree　The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock　In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction　In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header　Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access　In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

user interaction object　In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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