PeopleSoft.

PeopleSoft Enterprise Sales Incentive Management 8.9 Reports

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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:

• Related documentation.

• Comments and suggestions.

Documentation Updates and Printed Documentation

This section discusses how to:

• Obtain documentation updates.

• Order printed documentation.

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

CHAPTER 1

Sales Incentive Management Reports

This appendix provides an overview of Sales Incentive Management reports and enables you to view summary tables of all reports.

Note. For samples of these reports, see the PDF files that are published on CD-ROM with your documentation.

Sales Incentive Management Reports: A to Z

This section lists the Sales Incentive Management reports, sorted alphabetically by report ID. The manager and participant reports are all Crystal reports. The compensation administrator reports are stored Query Builder queries, except the Compensation Analysis, Transaction Life Cycle, and Plan Summary reports, which are Crystal reports.

This section lists the delivered Sales Incentive Management reports sorted by report type.

There are five types of reports:

• Compensation administrator reports.

Compensation administrators have access to these Crystal reports through the Review Incentive Information menu.

• Participant UI Crystal reports.

These reports are based on UIO definitions as defined on the User Interaction - Reports page. These definitions include the menu, component, page and record of the run control required to run the report. They also include the process name and type for this purpose. Participants and managers have access to these reports through the Participant UI. Report availability depends on the participants or managers security access and the UIO groups to which they are assigned on their compensation structure nodes.

• Participant UI static page reports.

These reports are based on UIO definitions as defined on the User Interaction - Pages page. These definitions include the menu and component of the PIA page that the Participant UI Framework uses to determine the data that appears on the pages. Participants and managers have access to these PIA pages through the Participant UI. Page availability depends on the participants or managers security access and the UIO groups to which they are assigned on their compensation structure nodes.

• Participant UI configurable page reports.

These reports are based on configurable UIO definitions as defined on the User Interaction - Configurable page. These definitions determine how the Participant UI Framework renders all aspects of the page, including all sections, links, names, navigation, and the predefined queries that the it uses to determine the data that appears on the pages. Participants and managers have access to these configurable pages through the Participant UI. UIO instance availability depends on the participants or managers security access and the UIO groups to which they are assigned on their compensation structure nodes.

• Predefined queries.

Compensation Administrators can access the query reports directly through the Pre-defined Queries component in the Review Incentive Information menu. Compensation administrators can also assign these queries to UIOs by marking these queries as Configurable type. Participants and managers can then access these queries indirectly through other reports and pages on participant UIs.

Note. Compensation administrators can also write ad-hoc queries using the Query Builder tool.

Compensation Administrator Reports

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHCA0, EISIHCAP, EISIHCAT Compensation Analysis	A summary report that shows participants and their payouts, payment code for the current period, payment code for the prior period, and the variance. Users can sort this report by business unit, territory, or both.	Compensation, Sales Incentives, Review Incentive Information, Compensation Analysis Report	EI_SI_RUN_COMP_ANL
EI_BC_COMP_SUMMARY Compensation Summary	Displays information about the compensation amount paid for a specific period in each node of the territory. The report groups information by compensation structure and payment type.	Compensation, Sales Incentives, Review Incentive Information, Compensation Summary Report	EI_BC_COMP_SUMMARY
EI_BC_AENO_HUR Account Exec Not Met Hurdle	Displays the quota and attainment transaction details by performance measure for account executives have not met their monthly quota in a territory for a selected accounting period and fiscal year. Also displays the deficit amount.	Compensation, Sales Incentives, Review Incentive Information, Account Execs Not Met Hurdle	EI_BC_AENO_HUR
EISIHTC0 Transaction Life Cycle	This report groups transaction details, including exploded transactions, by order. This report may be generated for any fiscal year and accounting period. Transaction information such as Payee, Transaction Type, Current Transaction State, Credit Date/Amount, Comp Date/Amount, Published, and Posted Flags are displayed to facilitate reconciliation of orders flowing through the Sales Incentive Management system. This report is a Crystal report.	Compensation, Sales Incentives, Review Incentive Information, Transaction Life Cycle Report	EI_SI_RUN_TRANSACT

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_AETW_HUR Account Exec Met Twice Hurdle	Displays the quota and attainment transaction details by performance measure for account executives who have attained twice their quota in a territory for a selected accounting period and fiscal year. Also displays the surplus amount.	Compensation, Sales Incentives, Review Incentive Information, Account Executive Twice Hurdle	EI_BC_AETW_HUR
EI_BC_ASSET Asset Growth	Shows a selected participant's assigned quota, total attainment, and percent achieved in each assigned territories for the growth of Assets Under Management (AUM). This report displays data based on performance measure and frequency.	Compensation, Sales Incentives, Review Incentive Information, Asset Growth Report	EI_BC_ASSETEI_BC_ASSET
EISIHCPM, EISIHCPP Plan Summary	Displays the participants that appear on plans, participant quotas per plan, performance measure, and whether the quotas are reportable. If the variable has an override, the amount is shown. The report also shows the reference variable name and the initial value. The report is organized by all plans within a business unit. A calculated field sums the number of participants per plan. An optional prompt is provided in the run control for plan ID to generate a report for a specific plan.	Compensation, Sales Incentives, Review Incentive Information, Plan Summary Report	EI_SI_RUN_CA_PLAN
EI_BC_YTDSALES Investment Rep Sales Ranking	Displays the top 100 sales representatives and their ranking within a region or territory according to year-to-date sales amount of all products for the selected period.	Compensation, Sales Incentives, Review Incentive Information, Investment Rep sales Ranking	EI_BC_YTDSALES

Participant UI Crystal Reports

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHCP0 Participant Commission Statement	Shows commission credit for a participant (transactions that are used as credit for a commission). This report includes detailed *Transaction/Credit Information* and *Summary Information* sections, and a *Bonus* section for bonus period payouts. This Crystal report is based on the UIO ID 4500 (Commission Statement) as defined on the User Interaction - Reports page.	Click the Commission Statement link on the My Sales Compensation page.	EI_SI_RUN_PAR_COMM
EISIHCR0 Credits Report	This report shows information about participant credits for a given period context, including information from the following fields: Order Number, Credit Event, Customer Name, Product Name, Number of Units, Revenue Amount, Credit Split Percentage, Credit Amount, Performance Measure, and Status (*Earned, Pending,* or *Paid*). This Crystal report is based on UIO ID 4501 (Credits Report) as defined on the User Interaction - Reports page.	Click the Credits Report link on the My Sales Compensation page.	EI_SI_RUN_CREDT_RT
EISIHCM0 Sales Force Commission Statement	Shows commission credit for a manager, summarizing and grouping commission data by reporting regions and salespeople. Report includes detailed *Transaction/Credit Information* and *Summary Information* sections, and a *Bonus* section for bonus period payouts. This Crystal report is based on the UIO ID 4502 (Sales Force Commission Statement) as defined on the User Interaction - Reports page.	Click the Sales Force Commission Stmt link under Manager Reports on the My Sales Compensation page.	EI_SI_RUN_MGR_COMM

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHIC0 Indirect Credits Report	Lists all indirect credits received by the manager from participants who do not directly report to that manager. This statement includes details of base amount, credit amount, credit rate, compensation rate, payout amount, and contributing participant information. This Crystal report is based on the UIO ID 4504 (Indirect Credits Report) as defined on the User Interaction - Reports page.	Click the Indirect Credits Report link on the My Sales Compensation page.	EI_SI_RUN_INDCR_RT
EISIHUC0 Manager Unpaid Credits Report	Lists all the credits for which payout has not been made to the manager, including credits held for calculations and credits held for payments. For a participant, this report shows the same information for the participant. This Crystal report is based on the UIO ID 4505 (Manager Unpaid Credits Report) as defined on the User Interaction - Reports page.	Click the Manager Unpaid Credits Report link on the My Sales Compensation page.	EI_SI_RUN_UPCRD_RT
EISIHUCP Participant Unpaid Credits	Lists all the credits for which payout has not been made to the participant, including credits held for calculations and credits held for payments. This Crystal report is based on the UIO ID 5406 (Participant Unpaid Credits Report) as defined on the User Interaction - Reports page.	Click the Participant Unpaid Credits Rpt link on the My Sales Compensation page.	EI_SI_RUN_UPCRP_RT

Report ID and Report Name	Description	Navigation	Run Control Page
EISIBCP0 BCM Commission Statement	This report contains three sections. The header section displays participant details such as address, the branch at which the participant is working, , and the plan associated with the selected period. The summary section displays the variables (such as quota and attainment) that are associated with performance measures, values, and frequency in an easy-to-read tabular format. This section also displays a graphical representation of the variables. The detailed section, which is the core section of the report, displays all transactions achieved by a sales participant for a selected period, grouped by performance measure. Details include account number, product, customer, commission rate, and commission amount. This Crystal report is based on the UIO ID 5407 (BCM Commission Statement) as defined on the User Interaction - Reports page.	Click the BCM Commission Statement link on the My Sales Compensation page.	EI_BC_PAR_COMM

Report ID and Report Name	Description	Navigation	Run Control Page
EISIBCM0 BCM Manager Commission Statement	This report contains three sections. The header section displays participant details such as address, the branch at which the manager is working, , and the plan associated with the selected period. The summary section displays the variables (such as quota and attainment) that are associated with performance measures, values, and frequency in an easy-to-read tabular format. This section also displays a graphical representation of the variables. The detailed section, which is the core section of the report, displays all transactions achieved by managers for a selected period, grouped by performance measure. Details include subordinate, account number, product, customer, commission rate, and commission amount. This Crystal report is based on the UIO ID 5408 (BCM Manager Commission Statement) as defined on the User Interaction - Reports page.	Click the BCM MGR Commission Statement link on the My Sales Compensation page.	EI_BC_MGR_COMM

Participant UI Static Page Reports

Report ID and Report Name	Description	Navigation	Run Control Page
2000 Compensation Snapshot	(Inactive) View your attainment and commission information, allocated and credited transactions, and pending payments.	Click the Compensation Snapshot link on the My Sales Compensation page.	EI_SI_DS_SS
3000 Projected Snapshot	(Inactive) View your projected attainment and commission information, allocated and credited transactions, and pending payments.	Click the Projected Compensation link on the My Sales Compensation page.	EI_SI_DS_PC

Report ID and Report Name	Description	Navigation	Run Control Page
4000 Sales Force	(Inactive) View sales force performance (attainment and commission, allocated and credited transactions, and pending payments) and plan summary.	Click the Sales Force link on the My Sales Compensation page.	EI_SI_DS_SF
5000 General Problem Reporting	Participants can initiate an email discussion with the specific compensation administrator associated with the business unit of a compensation structure's root node to report problems or discrepancies with their compensation information.	Click the General Problem Reporting link on the My Sales Compensation page.	EI_GEN_PROB_RPTNG
6800 Search Utility	Participants can perform basic and advanced searched based on predefined participant queries.	Click the Search Utility link on the My Sales Compensation page.	EI_SRCH_UTILITY
6900 View Subordinates Plan Summary	Shows a summary of plans for subordinates by participant and tree node. Authorized managers with security access can click the name of the plan to view plan details.	Click the Subordinate Plan Summary link on the My Sales Compensation page.	EI_MGR_SOPLN_SUM

Participant UI Configurable Page Reports

Report ID and Report Name	Description	Navigation	Run Control Page
6000 Compensation Snapshot	Contains the following pages of information for participants according to the selected context and period: Compensation Summary (shows payout summary, including many sections and links to other pages), Payout Details (shows payout details for a specific payout), Payout History (shows a history of all payouts grouped by both period name or payout code), Commission Details (shows line details for orders by performance measure), Commission History (shows a commission summary history by period and by performance measure), Opportunity Details (displays transactions for CRM opportunities), Order Summary (shows orders by performance measure including link to the Commission Details page), and Order Summary (Release/Held) (shows summary of commission details for orders in release/held status including link to the Commission Details page).	Click the Compensation Snapshot link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG

Report ID and Report Name	Description	Navigation	Run Control Page
6002 BCM Compensation Snapshot	Consolidates and reports the participant's compensation summary, high-level calculation details, and the BCM-specific transactions that the system processed and used to calculate the compensation. Contains the following pages of information for participants according to the selected context and period: 1. Compensation Summary: Shows the participant's payout summary by payment code, performance summary, commission by performance measure, and opportunity performance. 2. Payout Details: Shows BCM-specific transactions, grouped by transaction type, that the system processed and used to calculate the commission. 3. Payout History: Shows a history of all payouts grouped by both period name or payout code. 4. Commission Details: Shows line details for BCM transactions by performance measure. 5. Commission History: Shows a commission summary history by period and by performance measure.	Click the Compensation Snapshot link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG

Report ID and Report Name	Description	Navigation	Run Control Page
6500 Sales Force Snapshot - Sales Force Summary	Shows the performance summary quarter-to-date and year-to-date for all of a manager's subordinates, including quota and attainment values and percentage. Also shows a summary of performance as defined by the performance measures associated with plan variables. Also shows a summary of commission for subordinates.	Click the Sales Force Snapshot link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7000 Compliance Review	Shows details of compliance reviews including regulation, last reviewed date, and status.	Click the Compliance Review Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7100 Loans By Branch	Shows the loan amount, cost of the loan, and net revenue that was achieved by each territory node for the month and loan type. This reports lists loan details by loan type. The Loans Summary page on the main page shows a loan summary that includes loan amount, cost of loan, and net revenue amount. Participants can click a link for a specific loan to view the Load Details page, which displays further details about that loan.	Click the Loans By Branch Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7200 New Business Report	Shows the new business generated for a given territory in a particular calendar period for each line of business (LOB). This report includes sections that provide new business details on the retail banking, mortgages and loans, and asset investments LOBs.	Click the New Business Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7300 Product Sales Report	Shows product sales for each node in a territory according to product name and product type. Groups details by product. This report includes sections that provide product sales details on the retail banking, mortgages and loans, and asset investments LOBs.	Click the Product Sales Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG

Predefined Queries

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_AOP_COM_QRY Participant Account Open	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_AOP_PAYOUT_QRY Account Opening Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ARF_PAYOUT_QRY Account Referral Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ARV_PAYOUT_QRY Account Revenue Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_AUM_PAYOUT_QRY AUM Payout Query	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_BRO_INVLD_LIC Brokers Invalid License	Shows the brokers and agents who do not have a valid broker license in a particular period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_CA_HSEHOLD_QRY Holds Enrolled in Portfolios	Households are groups of accounts. Portfolios are also groups of accounts, but can consist of households and individual accounts. This query finds the households enrolled in multiple portfolios. This query is registered for public access so that anyone can view the results generated by the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_CA_HSEHOLD_QRY Households Enrolled	Households are groups of accounts. Portfolios are also groups of accounts, but can consist of households and individual accounts. This query finds the households enrolled in multiple portfolios. This query is registered for private access so that only the owner can view the results of the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_COB_ COM _QRY Participant CompObjective	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_COB_PAYOUT_QRY CompObjective Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_COMREV_QRY Compliance Review	This query is used in Compliance Review configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_COMSUM_QRY Commission Summary BC	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_DDS_ COM _QRY Participant Direct Deposit	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_DDS_PAYOUT_QRY Direct Deposit Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IMF_ COM_QRY Participant Investment Monthly	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IMF_PAYOUT_QRY Investment Monthly Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IVS_ COM _QRY Participant Investment Sales	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IVS_PAYOUT_QRY Investment Sales Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_LOANSUM_QRY Loans By Branch - Summary	This query is used in Loans Summary page on the Loans By Branch configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_LON_ COM _QRY Participant Loan Origination	This query is used on the Commission Details page in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_LON_PAYOUT_QRY Loan Origination Payout	This query is used on the Payout Details page in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_LONBCH_QRY Loans By Branch - Details	This query is used on Loans Details page in the Loans By Branch configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NBUAC_QRY New Business Report - Account	This query is used in the New Business Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NBUINV_QRY New Business Report-Investment	This query is used in the New Business Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NEWBLN_QRY New Business Reports-Loans	This query is used in the New Business Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NON_EMP_QRY Commission paid-Non Employee	Shows payments that are made to external participants who are not employees of the bank.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PMT_ COM _QRY Participant Performance Metric	This query is used on the Commission Details page in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PMT_PAYOUT_QRY Participant Performance Metric	This query is used in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDAC_QRY Product Sales Account	This query is used in the Product Sales Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDINV_QRY Product Sales Investment	This query is used in the Product Sales Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDLON_QRY Product Sales Loan	This query is used in the Product Sales Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDPACK_QRY Product Package Summary	The query displays a summary of the products that are sold in packages.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_PRTFOLIO_QRY Portfolio Summary Transaction	Shows the revenue generated by the portfolios. This query is registered for public access so that anyone can view the results generated by the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRTFOLIO_QRY Portfolio Summary Transaction	Shows the revenue generated by the portfolios. This query is registered for private access so that only the owner can view the results of the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_UNALLOCATED_TX Un Allocated Transaction	Displays transactions that could not be processed (or allocated) in the current period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ZERO_ALLOC_QRY Zero Allocation Query	Shows the participants who do not have allocated transactions in the specified period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ZERO_COM_QRY Zero Commission	Shows the participants who have earned zero commission.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ZERO_CREDIT_QR Zero Credits	Shows the participants who have earned zero credits.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_ACCRUAL_QRY Accrual	Shows credits that have been earned, but not yet paid for the purpose of booking a future liability against a company's books.	Compensation, Sales Incentives, Review Incentive Information, Pre-Defined Queries	EQRY_VIEWER_PG
EI_CA_CRDT_SPLIT_ADT Credit Split Audit	Shows current information on who has received credit for orders.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_CREDIT_SUM_QRY Credit Summary	Shows total credit earned by participants, grouped by order.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_DRAW_QRY Draw Search	Shows a participant's draw information: amount paid, amount repaid, and balance.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_JRNL_ADJS_QRY Credit and Payout Adjustments	Shows detail listing of all payout and credit adjustments made for participants in a given period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_CA_LEDGER_PYMTS Payments Posted to Ledger	Shows summary list of payments, by payment code, in the EIM ledger. Information for this query is derived from the ledger table.	Compensation, Sales Incentives, Review Incentive Information, Pre-Defined Queries	EQRY_VIEWER_PG
EI_CA_PSTD_TRANSX Transaction Posted to Ledger	Shows detail list of transactions that have been posted to the ledger for a given period. The sample period is January 2002. Information for this query is derived from the base transaction table.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_TXN_CYCLE Transx Cycle by Order/Customer	The query display transaction life cycle by account number and customer.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_UNALLOCATED_TX Unallocated Orders	Shows unallocated information, enabling the compensation administrator to correct or add needed data so that these transactions may continue in the processing cycle.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_UNCREDITED_TX Uncredited Orders	Shows orders that are in the system, but have not received any credit. This report is intended to help identify adjustments or orders affected by rule changes.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMDTL_QRY Commission Details	Shows transactions for a performance measure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMM_QRY Commission Overview Query	Shows the compensation structure territory for which to view a summary of sales incentive data according to relationship on the compensation structure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMM_S_QRY View Subordinates	Shows a summary of subordinates' incentive transaction data for a period according to relationship on the compensation structure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMSU2_QRY Commission Summary	Displays a summary of all the of all incentive activity for the specified period by context and currency.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_SI_COMSUM_QRY Commission Summary Query	Displays a summary of all the of all incentive activity for the specified period by performance measure, context, and unit of measure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_OPMVAR_QRY Opportunity PM Variable	Shows a list of variables related to projected commissions.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_OPPSUM_QRY Opportunity Sum	Shows a summary of projected commissions for CRM opportunities.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_OPPX_QRY Opportunity Transactions	Displays transactions for CRM opportunities.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_ORDSUM_QRY Order Summary	Displays a one line per order summary.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAY_AGG_QRY Aggregation Engine	Shows payout amounts summed by context and payment code.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAYDTL_QRY Payout Detail	Shows detailed payout data for a period that is specific to a performance measure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAYSU2_QRY Payout Summary	Shows history of payout data across periods that is by performance measure. Includes period context.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAYSUM_QRY Payout Summary Query	Shows history of payout data across periods that is by performance measure. Includes payment code, period context, unit of measure, and period end date.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PMVAR_QRY Performance Measure YesVar Query	Shows detailed list of variables by period and context.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PTNTL COMP_QRY Potential Compensation	Shows the sum of the commission amounts for order transactions by period and context	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_RHLSUM_QRY Order Summary (Release/Held)	Shows detailed order data by order line in release/held status.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_SI_SF_COMSUM_QRY Sales Force Commission Summary	Displays manager overview of performance by performance measure of their subordinates.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_CUSTOMERS Customer Information	Show a list from the Customer table (independent of participant).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_MYTEAM My Sales Team	Shows all participants who report to a manager, along with information such as years of service, job code, etceteras.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_PRODUCTINFO Product Information	Shows a list from the Product table (independent of participant).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_RTEX_DTL My Transaction Details	Shows all orders for a participant (by context).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_SUB_ORDERS My Salespeople Order Details	Shows all orders for a manager's direct reports (by context).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.