Oracle® Sales Compensation

Implementation Guide

Release 11*i*

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Oracle Sales Compensation Implementation Guide, Release 11*i*

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Preface

Welcome to *Oracle Sales Compensation, Release 11i.*

This *Implementation Guide* provides information and instructions to help you work effectively with Oracle Sales Compensation.

This preface explains for whom this Implementation Guide is intended and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility.
- Sales Compensation managers, analysts, and salespeople tasked with implementing and using Oracle Sales Compensation.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology.

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to all of our customers. For additional information, visit the Oracle Accessibility Program web site at http://www.oracle.com/accessibility/.

Related Documents

For more information, see the following manuals:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Oracle Applications Concepts*
- *Implementing CRM Applications*
- Oracle CRM Foundation Components *Concepts and Procedures*
- Oracle CRM Foundation *Technical Reference Manual*
- Oracle CRM Foundation *Implementation Guide*
- *Implementing Oracle CRM:ERP Functional Checklist* (available on Oracle MetaLink)
- *Implementing Oracle CRM Functional Checklist* (available on Oracle MetaLink)
- Oracle Sales Online *Technical Reference Manual*
- Oracle Sales Compensation *Concepts and Procedures*
- *Oracle Applications Flexfields Guide*
- *Oracle Workflow Guide*
- Orac;e Sales Compensation Technical Reference Manual
- Oracle Applications *System Administrator's Guide*
- Oracle Applications *Developer's Guide*
- Oracle Application Object Library/Workflow *Technical Reference Manual*

Implementing Oracle Sales Compensation

This topic group provides general descriptions of the set up and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- Oracle Sales Compensation *Concepts and Procedures*
- Oracle CRM Foundation Components *Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

Overview of Oracle Sales Compensation

Using Oracle Sales Compensation you can automate the complex task of calculating compensation and customize compensation to suit the unique operations of your organization's sales force.

Because sales tasks vary highly from one company to another, a compensation system that produces windfall sales for one company might not suit another. Oracle Sales Compensation calculates and assigns compensation based on functions that precisely mirror the operations of your sales organization. For example, you can:

- Define the structure of a compensation transaction, or the set of information your sales organization needs to calculate sales compensation.

You specify the data you need, and Oracle Sales Compensation then collects this data for you from the data sources you specify.

- Categorize your business revenue into revenue classes that specify the types of revenue that warrant compensation in your organization.

  Oracle Sales Compensation assigns a revenue class to a compensation transaction using a set of classification conditions you define for each class. You can pay a salesperson for certain revenue classes but not for others because Oracle Sales Compensation only awards credit based on the revenue classes you assign to a salesperson's compensation plan.

- Define an unlimited number of compensation plans and assign them to individuals or groups of salespeople.

  You can compensate many different kinds of salespeople by mixing and matching compensation terms when you build each plan.

- Define how your organization tracks and pays incentive compensation.
- Specify how your organization typically makes adjustments.

After you define precisely how your sales force operates, you generate your own customized version of the system from which to pay sales compensation. You can respond to changing sales strategies by making changes in your setup and regenerating the system.

Navigation

The navigator displays:

- Icon that represents each functional area
- Drop-down list of views relating to each functional area
- Hierarchical list of functions that relates to the selected view
- Nodes in each hierarchy representing each related record in the database

Choose the functional area and choose a view. Double-click a node to expand the hierarchy. Double-click a data node to open the functional window and display the selected record.

Right-click a node to perform any of the following actions:

- Add a new item below the selected node
- Open the selected functional window

- Conduct a search
- Copy the selected node
- Refresh the list

This version of Oracle Sales Compensation is released on two different technology stacks, forms and Java Server Pages (JSP). Users must navigate between forms and JSP to complete certain tasks, for example, processing pay data.

System Integration

Oracle Sales Compensation integrates with other applications in the Oracle e-business suite to optimize the powerful functions of the product. Interface programs systematically link two or more systems to each other. With Oracle Sales Compensation and custom interfaces, you can accomplish some of the critical tasks of a sales compensation process:

- Collect sales transaction data from Oracle Receivables, Oracle Order Management, and other sources
- Pay supplier contract type resources using Oracle Accounts Payable
- Download payment data in Oracle Payroll for employee type resources
- Using Oracle CRM Foundation Resource Manager module:
  - Maintain sales roles and compensation groups
  - Maintain salespeople information
- Generate reports (see samples reports in the appendix of this Guide) related to compensation and other useful sales benchmarks
- Use Oracle Sales Online for Income Planner and salesperson self service needs

As a customization, you can create multiple interfaces, referred to as application programing interfaces (APIs), to bring transactions into Oracle Sales Compensation and to send transactions out to other systems. Oracle Sales Compensation transactions can originate from a sales order, a customer billing, a customer payment, or other business functions.

Overview

Oracle Sales Compensation exchanges information with other products within the Oracle e-business suite. Transactions, the raw material that fuels Oracle Sales

Compensation, are primarily derived from Oracle Receivables and Oracle Order Management.

Oracle Receivables and Oracle Order Management provide sales transaction information that forms the basis for calculating sales compensation.

Examples of the types of transaction data **Oracle Receivables** can provide include:

- Invoices
- Credit and debit memos
- Payment postings
- Write-off postings
- Take-back postings, which are generated when an invoice due date goes beyond the set grace period. The credit for the sale is deducted from the salesperson's sales credit.
- Give-back postings which are generated when a past due invoice that has been deducted from the salesperson's sales credit is paid. The salesperson receives the credit.

From **Oracle Order Management**, you can collect booked orders and adjustments to booked orders. In release 11*i* of Oracle Applications, Order Management replaces the Order Entry system interface for collecting order information. Oracle Sales Compensation, as well as all other applications in the Oracle e-business suite, must use the new Order Capture module to interface to Order Management.

Resource Manager is the common source for resource definition, and Oracle Sales Compensation ability to read Resource Manager directly eliminates the need to create commonly used definitions and relationships in multiple applications. Use Resource Manager to

- Create Resources (salespeople)
- Create Sales Roles (formerly known as plan type) and assign salespeople to them
- Create Compensation Groups, the basis of Sales hierarchy

In addition to these traditional sources of information, release 11*i* of Oracle Sales Compensation provides two-way integration to applications such as Oracle Sales Online, Business Intelligence Systems (BIS), and other applications within the e-Business suite. Some examples of this integration include the following:

- Oracle Sales Online provides a sales performance and compensation forecasting tool for sales representatives and managers, based on current compensation

plans. It is also a means for monitoring sales force performance through self-service compensation reports, the Year-to-Date Commission Summary and the Quota Performance Report. Salespeople can view their compensation summary and break down their commissions by deal, product line, period, adjustments, or transactions. They can also use Sales Online to view projected compensation based on opportunities they enter into the system or commit to the forecast.

- Compensation information is also made available to Oracle Sales Intelligence.

Foundation Modules and Dependencies

CRM Foundation modules are those that build on code shared by applications in the Oracle e-Business suite. A foundation module performs the same function in many different applications. All foundation modules are provided when any e-Business application is purchased. Two foundation modules that are especially important to understanding Sales Compensation are Resource Manager and Order Capture.

Order Management is a new module in R11*i* of Oracle's e-Business suite. In the event that Order Management is purchased and installed, it serves as the mechanism by which Sales Compensation accesses Order Capture information.

Oracle Sales Online

If a manager is required to allocate Quota to his / her Directs, then this manager can perform the Quota allocation and Compensation Plan distribution tasks via the Compensation tab in Oracle Sales Online windows.

If Salespeople have access to Oracle Sales Online, they can submit their estimate of their own Quota and either accept or reject their Compensation Plans when the Plans are distributed to them by their manager via Oracle Sales Online.

Please observe the following steps so that managers and salespeople have access to the windows under the Compensation tab in Oracle Sales Online.

Prerequisites

System Administrator responsibility is required.

Steps

1. In the System Administrator Navigator, select Security.
2. Expand the Security menu by double-clicking on Security.

3. Double-click User.
4. Double-click Define.
5. Find the Oracle Sales Compensation responsibility name by enabling this Form in the Query mode. From the Menu bar, select **View** > **Query by Example** > Enter. (The F11 key performs the same function.)
6. Enter your User's name in the User Name field. Start the search from the Menu bar by clicking **View** > **Query by Example** > Run. (Pressing the Control key and the F11 key together performs the same function.)
7. Under the Responsibility column, add a new responsibility by selecting either Sales Compensation Manager or Sales Compensation Salesrep.
8. Enter a Start Date against this new responsibility assignment and possibly an End Date if you wish to terminate this User's access to the Compensation tab in Oracle Sales Online at a certain point in time in the future.

Planning

Planning allows both managers and salespeople to provide feedback about the estimated sales amount that they feel is achievable.

For full functionality see the Planning section.

Income Planner

Income Planner in OSO will work after the forecast input and output formulas are assigned to the Compensation Plan.

The forecast formulas must contain a calculation expression object called a forecast amount as part of the formula. For further explanation of Formula and Expression functionality, please refer to:

Creating Formulas and

Forming Calculation Expressions.

Steps

1. Choose **Compensation Plans** from the **Navigator**.
2. Select View by Calculation Expressions.
3. Right click mouse and select New.

4. In the Expression Block, select your Expression fields. Forecast Amount MUST be one of the elements selected as part of your expression if it is to be used in Oracle Sales Online.
5. The output expression MUST contain Rate Table Result as the first element selected and Forecast Amount should appear in the expression as well.

Guidelines

For example, a salesperson's compensation is based on a revenue quota and the rate table tiers relate to achievement as a percentage of the quota. Because the forecast results are hypothetical figures, the forecast formula does not affect the actual achievement result. In this case, suppose the input forecast formula is Forecast amount / TARGET and the output forecast formula is Rate Table Result*Forecast amount. The input formula expresses the proportion of the forecast amount to the quota, and the output formula applies a commission rate to the forecast amount. The commission rate chosen depends on the salesperson's achievements to date as compared to the commission rate tiers.

Oracle Resource Manager

Defining Roles

A Role may encompass one or more job descriptions and job titles. Use Roles to assign jobs to resources, resource groups and resource teams. Oracle Resource Manager is delivered with pre-defined Roles for all CRM modules. Use this procedure to define additional custom Roles for your enterprise.

Prerequisites

Make sure that a Role Type exists with which you can associate the new Role.

Steps

1. In the CRM Resource Manager responsibility, navigate to **Setup > Role**s.

   The Roles window displays fields you can use to define a role.
2. Enter your values in the Code and Name fields. Choose a Role Type from the list of values. For Sales Compensation choose Sales Compensation.
3. Select the Active box to make the Role active. Select one or more of the job title boxes–Manager, Member, Admin, Lead–to associate the Role to job titles.
4. Use one or more of the Job lines to describe jobs associated with the Role.

5. Select File > Save to complete the Role definition.

Oracle Payable

Oracle Payable recognizes Salespeople for payment if they are activated as Suppliers through Oracle Purchasing. Please refer to Oracle Purchasing Guides.

When a Payrun has been processed (Paid status against the Payrun name), the Salespeople Sub-ledgers are updated to reflect the amounts paid in the appropriate accounts and balances.When activated, user will send payrun details to Oracle Payable Invoices Interface table.

The following two tables show the columns which map to the invoice interface in Oracle Payable:

AP_INVOICES_INTERFACE	Populated with
INVOICE_ID	AP_INVOICES_INTERFACE_S.NEXTVAL
INVOICE_NUM	CNPD.COMMISSION_LINE_ID
INVOICE_DATE	CN_PAYRUNS.PAY_DATE
VENDOR_ID	FND_USER.SUPPLIER_ID
VENDOR_SITE_ID	PO_VENDOR_SITES.VENDOR_SITE_ID
INVOICE_AMOUNT	COMMISSIONABLE_AMOUNT
INVOICE_CURRENCY_CODE	FUNCTIONAL CURRENCY CODE
PAYMENT_CURRENCY_CODE	REP CURRENCY CODE
SOURCE	“OSC” (NEW quick code of type SOURCE)

AP_INVOICE_LINES_INTERFACE	Populated with
INVOICE_ID	Same value as entered for AP_INVOICES_INTERFACE
INVOICE_LINE_ID	AP_INVOICE_LINES_INTERFACE_S.NEXTVAL
LINE_NUMBER	CNPD.COMMISSION_LINE_ID
LINE_TYPE_LOOKUP_CODE	ITEM / TAX / MISCELLANEOUS
AMOUNT	CNPD

The Liability Account will also be mapped to the Oracle Payable Interface. This will be done using the account generator, accessible via the Ruleset Form or liability account information entered at the plan element or revenue class level.

Setting System Profile Options

The table below lists the profile options which need to be set to implement Oracle Sales Compensation after the product has been installed, but before the system is ready to be used to build compensation plans, collect and process transactions, and pay sales compensation. The options can be set in any sequence.

To set system profile options:

1. Log in to Oracle Applications and choose the Sales Compensation Super User responsibility.
2. From the System pull down menu, select System Profiles.
3. Enter the following values or choose from the List of Values:

- *Application*: Oracle Sales Compensation
- *Responsibility:* Use only if the profile option you are defining is specific to a responsibility.
- *User:* Use only if the profile option you are defining is specific to a user.
- *Profile:* OSC%.

4. Click Find.

The following table contains information about Profile Options in Sales Compensation, along with a description of each.

	Option	Description
1.	OSC: Collect on Account Credits Default: No	The application will collect only invoices and regular credit memos. If set to Yes, then the application will collect invoices, regular credit memos, and on account credit memos when running Oracle Receivable Collection.
2.	OSC: Commission Rate Precision Default: Null	Determines the commission rate precision. For example, 1.035 has a precision of 3.

	Option	Description
3.	OSC: Debug Mode Default: No	Determines whether debugging messages are written to the process log during execution of programs, whether concurrent or online. Setting Debug Mode to Yes writes these errors to an internal audit table.
4.	OSC: Default Custom Flag Default: Yes	When set to Yes, the compensation plans are customized. Otherwise, they are not customized.
5.	OSC: Log File Default: No	If set to Yes, debugging messages are written to a log file. Only enable this profile option for debugging purposes if there are suspected problems with the application. If enabled, this profile option generates log files, which can affect performance.
6.	OSC: Log File Directory	Sets the directory where the log file will be stored. When you enter the directory path, you do not need to enter a slash after the name.
7.	OSC: Mark Events Default: Yes	Answer No while setting up your system. Change to Yes when you are ready to start collecting transactions. Every event such as a transaction is put into the Notify Log so that it will be included in the next calculation.
8.	OSC: Prior Adjustment Default: Yes	Allows prior adjustments. If set to No, allows all plan elements in a period to be calculated incrementally. Before setting to No, be sure that any transactions that have a process date earlier than the latest process date shown in the System Parameter window have been calculated.
9.	OSC: Sleep Time in Seconds Default: 180 seconds	Sets the amount of wait time in between each phase of calculation. The wait time gives each phase time to complete the current process without being queried by the system for a status. For high volume transactions, use the default setting.
10.	OSC: Default Conversion Type Default: Null	Select the type of currency conversion. For example, corporate (usually budget translation rate from Oracle GL), spot (daily rate from Oracle General Ledger), user (user-defined rate as entered through form called Period Rates). (Toolbar > Financial > Currency Rates)
11.	OSC: Salesforce Planning FY	Enter planning financial year, for example 2001.
12.	OSC: New Items Profile Default: 5	Five news items are enabled by default for display on home page.

	Option	Description
13.	OSC: Default Tickers Profile Default: ORCL	Oracle's share price will be shown as a default. Choose your own ticker symbols.
14.	OSC: Scaling Factor Default: Null	Select type of figure display. For example, in thousands will display 1,000,000 as 1,000 and there will be a note at the top of the table, "USD in thousands".
15.	OSC: Salesforce Planning Debug Mode Default: No	Determines whether input variables show on the window
16.	OSC: Multi Rollup Path Default: Yes	Enables rollup of sales credits through multiple paths of the compensation group hierarchy.
17.	OSC: Currency Exchange Rate Date Default: System date	Enter date for reading the exchange rate in Oracle GL.
18.	OSC: Workflow Initial Wait Time in Hours	Enter number of hours before the first reminder is issued.
19.	OSC: Workflow Reminder Frequency in Hours	Enter number of hours interval between each subsequent reminder.
20.	OSC: Currency Code	Select a base currency.

Lookups

Lookups enable quick selection from drop-down menus. Sales Compensation has 100 lookups incorporated into its system to speed the process of entering data into forms. The lookups listed in the following table display the user name in the left column; the Type name is shown in full caps in the right column with the default selections below it. In a few cases, the selections are too vast to list, so you are directed to the application. You can add lookups and add values to the default lists.

To view lookups, perform the following:

Steps

1. From the Toolbar, click Systems.

2. Select Lookups from the drop-down menu.

   The Oracle Sales Compensation Lookups window appears.

3. From the Toolbar, click View.

4. Select Query by Example > Enter.

5. Repeat step 3. Select Query by Example > Run.

   The first lookup appears.

6. Scroll through the lookups by using the up and down arrow keys or use Find in the View drop-down menu.

   The Oracle Sales Compensation Lookups window displays the lookups individually as they are currently configured.

To edit or add values to a lookup, perform the following:

1. Follow steps 1 - 6 above.

2. For edits, click in the field you want to change and enter new data.

3. To add values, click the field in the first blank line of the table and enter the appropriate data.

4. The From column automatically populates with the current date and the Enabled check box is automatically selected. Change these as needed.

5. Save your work.

To add a new lookup, perform the following:

Steps

1. From the Toolbar, click Systems.

2. Select Lookups from the drop-down menu.

   The Oracle Sales Compensation Lookups window appears.

3. Click the Application field and select Oracle Sales Compensation from the drop-down list.

4. Enter a name in the Type field. Use all caps with underlines between words.

5. Enter a user name in the User Name field.

6. Enter a description in the Description field if you wish.

7. In the table in the lower part of the window, enter one or more values that you want to use in the lookup. Enter a code, meaning, and description that are easy for users to understand.
8. Type in effective dates or click the calendar icons to enter dates from a graphic calendar. Select the Enable check box if you want the lookup to be operational within the effective date range.
9. Save your work.

The following table lists Sales Compensation Lookups, including a description, Access Level, and Seeded Values and Meanings.

Oracle Sales Compensation Lookup Code Values

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
ACCESS_CODE	Access Code	E	Update View
ACTIVATE_STATUS	Plan Activate Status	E	Created Pushed Updated
ADJUSTMENT_REASON	Manual Adjustment Reason	E	AR Error (Accounts Receivable error) OE Error (Order Entry error) Other Shared (Commission should be split)
ADJUST_STATUS	Manual Adjustment Status	E	Cancelled Posted Reversed Review Trial

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
ADJUST_STATUS	Transaction Adjust Status	E	DEALASGN (Deal Move) Deal Split Frozen Manual MASSADJ (Move Credits) MASSASGN (Share Credits) Original Reversal SPLIT (Splits)
APPLICATION_TYPE	Application Type	E	AR (Oracle Receivables) CN (Oracle Commission) GL (Oracle General Ledger) OE (Oracle Order Entry) RA (Oracle Revenue Accounting)
BASE_RULE	Base Rule	E	Base Rule
BATCH_STATUS	Batch Status	E	Posted Unposted
CALCULATION_STATUS	Calculation Status	E	Complete Failed Incomplete Processing (In progress)
CALCULATION_TYPE	Types of Calculation	E	Bonus Commission

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
CALC_SUBMISSION_ OBJECT_TYPE	Calculation Submission Object	E	Calctype (Calculation type) Concurrent Flag (Concurrent Calculation) Employee Number Employee Type End Date Hierarchy Flag (Entire Hierarchy) Intelligent Flag (Do incremental calculation) Interval Type Batch Name (Calculation submission batch name) Responsibility Name (Application responsibility name) Salesrep Option (Salespeople) Start Date User Name (Application user name)
CLASSIFICATION_ DATATYPE	Classification Datatype	E	ALPN (Alphanumeric) DATE NUMB (Numeric)
CLASSIFICATION_STATUS	Classification Status	E	CLS (Classified) NEVER (Never Classified) XCLS (Failed Classification)
CN_PROMPTS	Prompt Texts used in UI	E	Dimension Name EXP_NAME (Expression Name) Formula Name Rate Table Name
CN_SEARCH_CATEGORIES	Sales Compensation Search Categories	U	Job Title Role Salesrep (Salespeople)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
COLLECTION_TYPE	Collection Type	U	CN_COLLECT_CLAWBACK (Clawbacks) CN_COLLECT_CUSTOM (Custom Transactions) CN_INVOICES CN_ORDERS CN_PAYMENTS_AND_ GIVEBACKS CN_WRITEOFFS
COLUMN_TYPE	Column Type	E	CF (Commissions Factor) CN (User Defined) EF (Event Factor) IN (System) PF (Payment Factor)
CP_OBJECT_TYPE	Compensation Plan Objects	E	CP_NAME (Compensation Plan) DESC (Description) END_PERIOD REV_CLS_OVERLAP (Allow Revenue Class Overlap) Start Date Start Period Status Code
CP_PHASE_CODE	Concurrent Request Phase Code	E	C (Complete) I (Inactive) P (Pending) R (Running)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
CP_STATUS _CODE	Concurrent Request Status Code	E	A (Waiting) B (Resuming) C (Normal) D (Cancelled) E (Error) G (Warning) H (On Hold) I (@Normal) M (No Manager) P (Scheduled) Q (Standby) R (@@Normal) S (Suspended) T (Terminating) U (Disabled) W (Paused) X (Terminated) Z (@Waiting)
CURRENCY_TYPE	Currency Type used in reports	E	Functional Currency Salesrep Currency
DATA_TYPE	Column Datatypes	E	Date Long Number Varchar2
DISCOUNT_OPTION	Discount Option	E	None (Not apply discount pctg) Payment (Apply to payment factor) Quota (Apply to quota factor)
DISTINGUISHED_ HIERARCHIES	Distinguished Hierarchies	E	Revenue Class Salesrep

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
DISTRIBUTE_METHOD	Method for distributing quota	E	Equal Even MIN (Minimum)
DYNAMIC_PROMPT	Period Processing Status Dynamic Prompt	E	Distribute Draw Distribute Target Draw Payment Period Draw Period Targets Target
ELEMENT_TYPE	Element Type	U	-1000 (Recoverable Payment) -1001 (Nonrecoverable Payment)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
EVENT_NAME	Event Name	E	CHANGE_CLS_HIER (Change a hierarchy used in classification) CHANGE_CLS_HIER_DATE (Change a hierarchy date) CHANGE_CLS_HIER_DELETE (Delete a hierarchy interval used in classification) CHANGE_CLS_HIER_PERIOD (Change a hierarchy interval used in classification) CHANGE_CLS_RULES(Change classification rules) CHANGE_CLS_RULES_ATTR (Change classification rules attribute) CHANGE_CLS_RULES_DATE (Change classification ruleset date range) CHANGE_CLS_RULES_HIER (Change classification rules hierarchy) CHANGE_CLS_RULES_REV (Change classification rules revenue class) CHANGE_CLS_RULES_SET (Change classification rules set CHANGE_COMP_PLAN (Change compensation plan) CHANGE_COMP_PLAN_OVER_LAP_FLAG (Change compensation plan overlap flag) CHANGE_COMP_PLAN_PERIOD (Change compensation plan effective interval) CHANGE_CP_ADD_MGR (Add a manager to a compensation group) CHANGE_CP_ADD_SRP (Add a salesperson to a compensation group)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
EVENT NAME (continued)	Event Name	E	CHANGE_CP_DELETE_MGR (Delete a manager from a compensation group) CHANGE_CP_DELETE_SRP (Delete a salesperson from a compensation group) CHANGE_CP_HIER_ADD (Add an edge to compensation group hierarchy) CHANGE_CP_HIER_DATE (Change date range of a compensation group) CHANGE_CP_HIER_DELETE (Delete an edge from a compensation group hierarchy) CHANGE_CP_MGR_DATE (Change date range of a manager) CHANGE_CP_SRP_DATE (Change date range of a salesperson) CHANGE_DELETE_TRX (Delete transactions) CHANGE_FORMULA (Change a formula) CHANGE_INSERT_TRX (Insert new transactions) CHANGE_PERIOD_INTERVAL_NUMBER (Change a period's interval number) CHANGE_PLAN_ASSIGN (Change plan assignment CHANGE_PLAN_ASSIGN_INS_DEL (Insert or delete plan assignment) CHANGE_PLAN_ASSIGN_PERIOD (Change plan assignment effective interval) CHANGE_QUOTA_CALC (Change plan element)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
EVENT_NAME (continued)	Event Name	E	CHANGE_QUOTA_DATE (Change plan element date range) CHANGE_QUOTA_PERIOD (Change plan element effective interval) CHANGE_QUOTA_POP (Change plan element revenue class factors) CHANGE_QUOTA_ROLL (Change plan element revenue class) CHANGE_QUOTA_UPLIFT_DATE (Change -plan element uplift factors date range CHANGE_RC_HIER_DATE (Change revenue class hierarchy date range) CHANGE_RC_HIER_DELETE (Delete revenue class hierarchy effective interval) CHANGE_RC_HIER_PERIOD (Change revenue class hierarchy effective interval) CHANGE_RT_INS_DEL (Insert or delete rate tiers) CHANGE_RT_RATES (Change rate table rates) CHANGE_RT_TIERS (Change rate table tiers) CHANGE_SRP_HIER (Change salesperson hierarchy) CHANGE_SRP_HIER_DELETE (Delete salesperson hierarchy effective interval) CHANGE_SRP_HIER_PERIOD (Change salesperson hierarchy effective interval) CHANGE_SRP_QUOTA_CALC (Change salespersons plan element setting)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
EVENT_NAME (continued)	Event Name	E	CHANGE_SRP_QUOTA_PAYEE_DATE (Change date range of payee assignment) CHANGE_SRP_QUOTA_POP (Change salespersons uplift factors or payee assignment) CHANGE_SRP_ROLE_PLAN (Change role / plan or role / salesperson assignment) CHANGE_SRP_ROLE_PLAN_DATE (Change date range of role / plan / salesperson assignment CHANGE_SYS_PARA_RC (Change revenue class hierarchy used) CHANGE_SYS_PARA_SRP (Change salesperson hierarchy and roll up flag) CHANGE_UPDATE_TRX (Update transactions)
EXPRESSION MESSAGES	Messages Required for Rule Attribute Expressions		AND BET (between) GT (greater than) IIH (is in hierarchy) IS LT (less than) NOT OR RES (result) WV (with value)
FORMULA_STATUS	Formula Status	E	Complete Failed Incomplete In Progress Invalid Valid

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
FORMULA_TYPE	Formula Type	E	B (Bonus) C (Commission)
INCENTIVE_TYPE	Incentive Type	E	Bonus Commission Manual Payment Quota
INCENTIVE_TYPES	Payment Incentive Types	U	Bonus Commission PMTPLN (Payment Plan) PMTPLN_REC (Payment Recovery)
INPUT_TOKEN	Input Token	E	QC (Quota Category) QSR (Quota Category / Sequence / Role) RCS (Role, Compensation Plan / Start Date) RP (Base Quota Component / Percent) SEQ (Sequence Number)
JE_BATCH_REASON	Reason for creating JE batch	E	BONUS CALC (Calculation) DRAW_BONUS (Draw Recovery from Bonus) DRAW_COMM (Draw Recovery from Commission) PAYMENT PAY_ADJ (Adjust Payment) PAY_BONUS (Payment from Bonus) PAY_COMM (Payment from Commission) PAY_DRAW (Draw Payment)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
LOAD_STATUS	Load Status	U	Loaded Unloaded
MAPPING_TYPE	Mapping Types	E	COL (Collection) EVT (Event) SLC (Slice)
MESSAGE_TYPE	Message Types	E	Debug Error TRANSLATE (Translated)
MGR_REPORT	Top Bottom Performance Report Hierarchy Level	E	1 (Directs) 2 (Level 1 Indirects) 3 (Level 2 Indirects) 4 (Level 3 Indirects) 5 (Level 4 Indirects) ALL
MODULE_STATUS	Module Status	E	GENERATED (Complete) UNSYNC (Incomplete)
MODULE_STATUS_OLD	Old Module Status	E	DEF (Definition) GEN (Generated) GRQ (Generate Request) INS (Instantiated) IRQ (Instantiate Request)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
MODULE_TYPE	Module Types	E	ACCGEN (Account Generation) CALCULATION CB (Clawback Collection Module) CB / GB (Clawback / Giveback Collection Module) CLS (Classification Module) COL (Collection Module) CPAPI (Compensation Plan API Module) INS (Commissions Instance Module) INV (Invoice Collection Module) LOADER (Transaction Interface Loader) ORD (Order Collection Module) PEAPI (Plan Element API Module) PMT (Payment Collections Module) PMT / GB (Payments / Giveback Collection Module) REVCLS (Revenue Classification) RUP (Rollup Module) SLC (Slice Module) TRF (Transfer Module) TRX (Commissions Transaction Table Module) WO (Writeoff Collection Module)
NOTIFY_ACTION	The action to be taken due to events caused by changing compensation group hierarchy	E	Delete Pull Roll ROLL_PULL (Roll and Pull)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
NOTIF_LOOKUP_TYPE	Lookup used by SF Planning workflow process	E	Accept / Reject Approve Customized Distribute Notification sent NOT_NOTIFIED (Notification not sent) Reminder
OBJECT_STATUS	Object Status	E	I (Invalid) N (New) V (Valid)
OBJECT_TYPE	Object Types	E	COL (Column) DBL (Database Link) IND (Index) PKB (Package Body) PKS (Package Specification) PRC (Procedure) SEQ (Sequence) TBL (Table) TRG (Trigger)
ORDER	Order	E	ASC (Ascending) DESC (Descending)
ORGANIZATION	Organization	E	Alliances BOL (Business Online) Education ISD (Telesales) Sales SC (Sales Consulting) Support
PAYGROUP_UPGRADE_TYPE	Paygroup Upgrade Type	E	Upgrade Paygroup

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
PAYMENT_CHANGE	Payment Change	E	Bonus Commission
PAYMENT_INCENTIVE_ TYPE	Payment Incentive Type	E	All Bonus Commission
PAYMENT_PLAN_TYPE	Payment Plan Type	E	MIN / MAX (Minimum / Maximum)
PAYRUN_STATUS	Payrun Status	E	Paid Paid with Returned Funds Posted Returned Funds Unpaid
PAY_GROUP_VALIDATION_ TYPE	Pay Group Validation	E	END_DATE (Pay Group End Date) Pay Group Name PERIOD_SET_NAME (Calendar) Period Type START_DATE (Pay Group Start Date)
PAY_RUN_VALIDATION_ TYPE	Pay Run Validation	E	Credit Type Employee Number Employee Type Pay Date Pay Group Name Pay Period Pay Run Name Role Sales Person
PAY_STATUS	Pay Status	E	Paid Unpaid
PA_OBJECT_TYPE	Compensation Plan Assignment Objects	E	EMP_NUM (Employee Number)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
PERIOD_PROCESSING_ STATUS	Period Processing Status	E	Calculated Classified Clean Populated Rolled Up Unclassified
PERIOD_TARGET_DIST_ RULE	Period Target Distribution Rule	E	Equal User Defined
PERIOD_TYPE_CODE	Period Type	E	Period Quarter Year

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
P_E_OBJECT_TYPE	Plan Element Objects	E	CALC_FORMULA_ID (Formula ID) CALC_FORMULA_NAME (Formula Name) CREDIT_TYPE CUM_FLAG (Accumulate Flag) DESC (Description) DISC_OPTION (Discount Option) DISC_RATE_TB (Discount Rate Table) DISC_RATE_TB_ID (Discount Rate Table ID) DRAW_AMOUT (Draw Amount) END_DATE END_PERIOD END_PERIOD_ID INCENTIVE_TYPE_CODE INTERVAL NAME ITD_FLAG (Interval to Date) PACKAGE_NAME PAYMENT_AMOUT (Payment Amount) PAYMENT_FACTOR (Payment Uplift) PAYMENT_TYPE PERIOD_TYPE (Interval Type) PE_NAME (Plan Element Name) QUOTA_FACTOR (Quota Uplift) RATE_TB (Rate Table) RATE_TB_ID (Rate Table ID) REV_CLS_ID (Revenue Class ID) REV_CLS_NAME (Revenue Class Name))

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
P_E_OBJECT_TYPE (continued)			REV_CLS_TARGET (Revenue Class Target SPLIT_FLAG START_DATE START_PERIOD START_PERIOD_ID TARGET (Quota) TRX_GROUP (Apply Trx) UPLIFT_END_DATE UPLIFT_PAYMENT_FACTOR UPLIFT_QUOTA_FACTOR UPLIFT_START_DATE
PLAN_GENERATE_STATUS	Plan Generation Status	E	Failed NOT_PUSHED (Not Activated) PUSHED (Activated)
PLAN_OBJECT_STATUS	Compensation Plan Object Status	E	Complete Incomplete
PLAN_STATE	Plan State	E	Active Inactive In Progress
PLAN_TYPE_STATUS	Plan Type Status	E	Accepted Approved Generated Issued Locked Pending Rejected Submitted

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
PMT_PLAN_VALIDATION_TYPE	Payment Plan Validation Type	E	Credit Type PMT_PLAN_NAME (Payment Plan Name) Start Date
POSTING_TYPE	Posting Type	S	Expense NON_REC (Non Recoverable) REC (Recoverable) TO_REC (To Recover)
PROCEDURE_TYPE	Procedure Types	E	F (Function) P (Procedure) Private Public
PROCESSING_STATUS_CODE	Processing Status	E	Clean
PROCESS_TYPE	Process Types	E	GEN (Generate) INS (Instantiate) XFR (Transfer)
QUOTA_CATEGORY	Quota Category Type	E	Fixed Total Quota VAR_NON_QUOTA (Variable Non Quota Based) VAR_NON_REVENUE (Variable Non Revenue Based) VAR_QUOTA (Variable Quota Based)
QUOTA_GROUP_CODE	Quota Group Code	E	Bonus Quota
QUOTA_PAYMENT_TYPE	Quota Payment Type	E	FIXED (Fixed Amount) PAYMENT (Payment Amount Percentage) TRANSACTION (Applied Transaction Amount Percentage)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
QUOTA_TRX_GROUP	Quota Transaction Group	E	GROUP (Grouped by Interval) INDIVIDUAL
QUOTA_TYPE	Quota Type	E	Discount Draw External Formula Manual Margin None REVENUE (Revenue Non Quota) TARGET (Revenue Quota) Unit Based Non Quota Unit Based Quota
REPORT_SECURITY_LEVEL	Report Security Level	E	A (Analyst) M (Manager) R (Salesrep) S (Super User)
REPOSITORY_STATUS	Repository Status	E	A (Active) I (Inactive)
REPOSITORY_USAGE	Repository Usages	E	A (All) P (Collector) S (Calculator)
RESPONSIBILITY_GROUPS	Salesforce Planning Responsibility Groups	E	CN_SF_CONTRACT_APPROVER (Contract Manager) CN_SF_FINANCE_MGR (Finance Manager) CN_SF_SALES_MGR (Sales Manager) CN_SF_SUPER_USER (Super User)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
RETURN_STATUS	API Return Status	E	E (Error) S (Success) U (Unexpected Error) W (Warning)
REVENUE_TYPE	Transaction Credit Type	E	Non Revenue Revenue
RS_OBJECT_TYPE	Rate Table Objects	E	COMM_AMT (Commission Amount) COMM_UNIT (Commission Unit Code) MAX_AMT (To Tier Maximum Amount) MIN_AMT (From Tier Minimum Amount) RATE_TB_NAME (Rate Table Name) Tier Unit Code
RULESET_TYPE	Ruleset Type	E	Data Flag End Date Module Type Object Name PARENT_RULE_ID (Parent Rule Identifier) RULESET_ID (Ruleset Identifier) Ruleset Name RULE_ATTRIBUTE _ID (Rule Attribute Identifier) RULE_ID (Rule Identifier) Rule Name Sequence Number Start Date

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
SALESREP_OPTION	Salesrep Option	E	ALL_REPS (All Salespeople) REPS_IN_NOTIFY_LOG (Salespeople in Notify Log) USER_SPECIFY (Salespeople specified by you)
SCALING_FACTOR	OSC: Scaling Factor	U	0 (No Scaling) 1 (in tens) 2 (in hundreds) 3 (in thousands) 4 (in tens of thousands) 5 (in hundreds of thousands 6 (in millions)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
SF_FORMULA_TEXT	SF Formula Text	E	EXPR_RTRS_DESC (SF Planning Rate Result) EXPR_RTRS_NAME (SFP Rate_ Rslt) EXPR_RTRSXTXN_AMT-DESC (SF Planning Rate Result times Transaction Amount) EXPR_RTRSXTXN_AMT-NAME (SFP Rate_Rslt*Trx_amount) EXPR-TRX_AMT-DESC (SF Planning Transaction Amount) EXPR-TRX_AMT-NAME (SFP Trx_ amount) EXPR-TRX_AMT/QTA-DESC (SF Planning Transaction Amount divided by Quota) EXPR-TRX_AMT/QTA-NAME (SFP Trx_amount/quota) FORMU-RQAP-DESC (SF Planning Revenue Quota Applied Amount Percentage) FORMU-RQAP-NAME (SFP RQAP Formula FORMU-RQFA-DESC (SF Planning Revenue Quota Fixed Amount) FORMU-RQFA-NAME (SFP RQFA Formula) FORMU-UQFA-DESC (SF Unit Quota Fixed Amount) FORMU-UQFA-NAME (SFP UQFA Formula) RT_TBL_RESULT (Rate Table Result) TARGET TRN_AMOUNT (Transaction Amount)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
SF_FORMULA_TYPE	SF Formula Type	E	RQAP (Revenue Based Quota Applied Amount Percentage) RQFA (Revenue Based Quota Fixed Amount) UQFA (Unit Based Quota Fixed Amount)
SRP_OBJECT_TYPE	Salesrep Object Type	E	ALL_ROLE (All Sales Roles) EMP_NUM (Employee Number) End Date PAY_GRP (Pay Group Name) PMT_PLN (Payment Plan Name) ROLE (Sales Role Name) SRP_NAME (Salesperson Name) SRP_TYPE (Salesperson Type) Start Date
SRP_PAYEE_OBJECTS	SRP Payee Assigns Objects	U	COMP_NAME (Compensation Name) Employee Number END_DATE (Payee End Date) Payee Name Payee Start Date PE_NAME (Plan Element Name) Role Name Salesrep Name START_DATE (@Payee Start Date)
TABLE_LEVEL	Table Levels	E	D (Dimension) H (Header Level) I (Internal) L (Line +) N (None) S (Sales Line)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
TABLE_TYPE	Table Types	E	T (Table) V (View)
TIMESCALE	Timescale	E	Period Quarter Year
TIME_INTERVAL_TYPE	Time Interval Type	E	PTD (Period to Date) QTD (Quarter to Date) YTD (Year to Date)
TOP_BOTTOM_PERF	Top Bottom Performer	U	Bottom Top
TRIGGERING_EVENT	Triggering Event	E	D (Delete) I (Insert) U (Update)
TRX_TYPES	Transaction Types	E	Balance Upgrade CBK (Clawback) CM (Credit Memo) DEP (Deposit) DM (Debit Memo) GBK (Giveback) INV (Invoice) MAN (Manual Transaction) ORD (Order) PMT (Payment) PMTPLN (Payment Plan) PMTPLN_REC (Payment Plan Recovery) RET (Order Return) Upgrade WO (Writeoff)

Sales Compensation Lookup	Description	Access Level	Seeded Values and Meaning
TRX_ROLLUP_METHOD	Transaction Rollup Method	E	INV (Invoice Processing Date) ORD (Order Processing Date)
TRX_STATUS	Commission Line Status	E	CALC (Calculated) CLS (Classified) COL (Unprocessed) NCALC (No Calculation) OBSOLETE (Obsoleted) PAYEE (Payeed) POP (Populated) ROLL (Rolled Up) XCALC (Failed Calculation) XCLS (Failed Classification) XPAYEE (Failed Payee) XPOP (Failed Population) XROLL (Failed Rollup)
UNIT_OF_MEASURE	Measurement unit	E	Amount Expression Percent String
YES_NO	Yes or No	E	N (No) Y (Yes)

Setting Up Salesforce Planning Module

Prerequisite

The tables in Resource Manager must be populated with employee and job title information in order for the Salesforce Planning module to run. Salesforce Planning has views of Resource Manager tables.

Window List for Planning Module

Tab: Salesforce Subtab: Summary

Salesforce Search

Salesforce Results

Salesforce Summary

Salesperson Details

Job Title Details

Sales Role Details

Salesforce Pay Element Details

Tab: Quota Subtab: Allocate

My Compensation Groups

Quota Modeling Summary

My Quota Estimate

Assign Quota

Compensation Plan History

Compensation Plan

Add To-Be-Hired

Salesperson Details

Tab: Quota Subtab: Approve

Salespeople Search

Salespeople Search Found

Contract Approval

Tab: Quota Subtab: Distribute

Salespeople Search

Salespeople Found

Distribute Contract

Tab: Quota Subtab: Activate

Salespeople Search

Salespeople Found

Compensation Plan Activate

Tab: Reports Subtab: Analysis

Summary Analysis Reports

Quota Model Summary

Average Quota Summary

Overassign Quota Summary

Quota Range Summary

Tab: Reports Subtab: Validation

Summary Validation Reports

Overlay Summary

To Be Hired Report

Transitional Salespeople

Tab: Reports Subtab: Generation

Summary of Generation Reports

Compensation Plan Generation Status

Sales Role and Compensation Plan Mapping

Tab: Setup Subtab: Sales Roles

Sales Role Summary

Sales Role Detail

Edit Computed Component Formula

Define Quota Anchors

Tab: Setup Subtab: Components

Quota Components

Tab: Setup Subtab: Attainment

Attainment Schedule Summary

Define Attainment Schedule

Tab: Setup Subtab: Job Titles

Job Title Summary

Job Title Details

Tab: Setup Subtab: User Access

User Summary

User Access Detail

Tab: Setup Subtab: Plan Text

Default Contract Text

Tab: Setup Subtab: Activate Roles

Role Activation

Quota Components

Use this window to create Components and specify their type.

Components are parts of a Compensation Plan. Examples of Fixed Pay Components are Salary and Car Allowance. Examples of Variable Pay Components are Multimedia PC Sales, Professional PC Sales and Maintenance Service.

Prerequisites

None

Steps

1. In the Salesforce Planning application, choose **Setup** > **Components**.
2. Enter the name of the Component.
3. Enter a short description for each component.
4. Select a Component type.
5. Check the Compute Flag check box if the value of the component is to be derived from a formula.
6. Check the Remove check box and click Update if you want to delete a component.

Guidelines

In the example, the Component names are Fixed Salary, Car Allowance, Multimedia PC Sales, Professional PC Sales, Total PC Sales, Maintenance Services, Total Quota.

Component types are either Fixed or Variable. If Variable, select either Quota Based or Non Quota Based. In the Vision example, Fixed Salary Component and Car

Allowance Component are both Fixed type. Multimedia PC Sales Component, Professional PC Sales Component and Maintenance Services Component are Variable Quota Based type.

If the Quota for a Component is to be derived from using a formula, then check the Compute Flag box. Total PC Sales Component and Total Quota Component are Variable Quota Based type as well but with the Compute Flag checked. Example, Total PC Sales Component has the Compute Flag checked because its value is the sum of the values of Multimedia PC Sales Component and Professional PC Sales Component added together. Total Quota Component value is the sum of values of Total PC Sales Component and Maintenance Services Component.

Attainment Schedule

The Attainment Schedule is used in the Compensation Contract where earnings for each level of achievement are displayed. To create an Attainment Schedule, perform the following procedure:

Prerequisites

Salesforce Planning Administrator responsibility required.

Steps

1. Click Setup > Attainment.

   The Attainment Schedule Summary page appears.

2. Enter the name of the attainment schedule you want to create in the blank field in the Attain Schedule Name column.

3. Click Update.

4. Click the new name from the Attainment Schedule Summary.

   The Define Attainment Schedule page opens.

5. Enter the desired percentages in the blank fields.

   If you need more than two fields, click Update and two more blank fields will appear under the saved ones.

6. Repeat step 5 until your attainment Schedule is complete.

7. Click Update to save.

Guidelines

To delete an Attainment Schedule, checking the Remove check box and click Update. You cannot delete an Attainment Schedule that is already assigned to a role. To change the name of an Attainment Schedule, create a new schedule with the same percentages, assign it to the role, and remove the old schedule.

Sales Role Summary

Use this window to find a Sales Role.

A Sales Role describes a set of salespeople who share a common compensation structure. Examples are PC Salesperson, Education Salesperson, Consultant, and PC Regional Sales Manager.

Prerequisites

Sales Roles must be created through Oracle Resource Manager.

Steps

Select a Sales Role name to go to the Sales Role Detail window.

Sales Role Detail

Use this window to view and/or edit a Sales Role's details.

Prerequisites

Sales Roles, Components, Attainment Schedules, Rate Tables, Single dimension Rate Tables must be created in the Production Module.

Steps

1. On Target Earnings: enter Total Earnings if Salesperson achieves 100% of quota.
2. Club Eligible: select check box if this Role is entitled to Club participation on achieving Club rules.
3. Rounding factor: Used for rounding of assigned quota. For example, input 1000 if assigned quota is to be rounded up to the nearest 1000.
4. Minimum and maximum quota: enter the range of quota figures that this Role should have.
5. Input the Compensation Plan Level. For example, a street level salesperson will have Level 1.

6. Select an Attainment Schedule applicable for this Role's Compensation Plan.
7. Fixed Pay Components: select Fixed Components and enter ascending numbers against each Component to indicate the sequence that each Component is to appear in the Assign Quota and Quota From Field Salespeople windows. Enter the Fixed Pay Amount for each Fixed Component. (Vision example: if the Fixed Salary of a PC Salesperson is 50000, then enter 50000 against the Fixed Salary Component.
8. Variable Pay Non Computed Components: as above, select Components and enter sequential order of display.
9. Variable Pay Computed Components: select Components and enter sequential order of display.
10. Variable Pay Non Quota Components: select Components and enter sequential order of display. Also enter the earnings figure if the target is achieved.
11. Map to Compensation Plan: entering the name of the Compensation Plan here will enable it to appear in Production when the activation process has been run.

Guidelines

Entering the Quota range enables the Quota Range Report to be run. The minimum quota on the Sales Role Details window will be picked up on the Minimum Quota field on the Quota Modeling window when the minimum function is invoked by the user.

Compensation Plan Levels are used in the Quota Model Summary and Average Quota Summary Reports where the Quota for each Component are totaled, for each level of Salespeople in the Salespeople Hierarchy for the selected parameters (example, Organization, Effective Date) of each Report.

The Attainment Schedule will be used in the Compensation Contract where earnings for each level of achievement are displayed.

Edit Computed Component Formula

Use this window to define a formula for a Computed Formula.

Prerequisites

Components must be created.

Steps

1. Select a Component from the list of values.
2. Enter the percentage against this selected Component. Repeat steps 1 and 2 until all variables of the formula have been defined.
3. Click Restore to retrieve the last saved set of information.
4. Click Save to save new information.

Guidelines

The percentages entered against each Component selected will be multiplied with the value of each Component. The results of all multiplication will be added together.

Define Quota Anchors for Sales Role

Use this window to complete the definition of the rate table and quota anchor details for a sales role.

Prerequisites

Rate tables must be created. Rate tables must also be assigned to the component to which you want to apply anchor values.

Steps

1. In the Rate Schedule Detail section, enter the commission rate range for each tier of the Rate Table.
2. In the Quota Anchors Detail section, select Amount if entering the commission earnings amount for each attainment / achievement level. For Percentages, select percentage and enter the percentage for each attainment level (percentage of quota). See Guidelines for more explanation.
3. Click Restore to retrieve the last saved set of information.
4. Click Save to save new information.

Guidelines

In the example below, at 0% achievement of quota, the variable pay is zero. At 25% of quota, the additional variable pay is 5,000. At 50% of quota achievement, the additional variable pay is increased to a maximum of 12,000. This means that the earnings in the 25-50% tier of the rate table are compensated at a higher

percentage than the 0-25% tier. At the 100% level of quota achievement, the additional variable pay is 20,000. Any achievements over 200% of quota are capped by entering the same value as the previous tier (no additional variable pay) against the highest rate tier.

0	Amount	0.00
25	Amount	5,000
50	Amount	12,000
100	Amount	20,000
200	Amount	50,000
9999	Amount	50,000

Default Contract Text

Use this window to define the text that accompanies the Compensation Plan.

Prerequisites

Super User responsibility is required.

Steps

1. Enter the title of the Contract at the Contract Title field.
2. Enter the Eligibility Rules in the Club Qualification text box.
3. Enter the Terms & Conditions of the Compensation Plan.
4. Enter the Approver's details in the Approver section.
5. Click Restore to retrieve the last saved set of information.
6. Click Save to save new information.

Guidelines

The text in the Terms & Conditions text box can be made to refer to the location of the Terms & Conditions. Example, "I accept the Terms & Conditions as set out in the Company Handbook that is posted on the Notice Board or the Company Handbook that was issued with the Employment Contract." This text will appear at the bottom of the Compensation Plan that will be generated later.

The Approver's details will appear at the bottom of the Compensation Plan as well.

Job Title Summary

Use this window to find a Job Title. Click a Job Title to access the Job Title Details window, where you can assign Sales Role(s) to the selected Job Title.

Prerequisites

Super User responsibility is required. Resources have been set up in Oracle Resource Manager.

Steps

Select a Job Title by clicking its name.

Guidelines

If using Oracle Human Resources Management System, the Job Title information here is read from HRMS via Oracle Resource Manager. If not using HRMS, please refer to Oracle Resource Manager for more information.

Job Title Details

Use this window to assign Sales Role(s) to the selected Job Title.

Prerequisites

Salesforce Planning Super User responsibility is required. Resources have been set up in Oracle Resource Manager.

Steps

1. Under the Role column, click the list of values box to the right of the Role field.
2. Click a Role name in the pop-up box, or enter search criteria in the Name field and select a Role from the search results.
3. Select a Start Date and an End Date for the term of the assignment by using the calendar pop-up box or alternatively, input the dates manually.
4. Click Save to save new information, or if desired, click Restore to retrieve the last saved set of information.

User Summary

Use this window to find a User. After that, the User Access Detail window will allow alterations to the selected User's access privileges.

Prerequisites

Super User responsibility is required.

Steps

Select a User by clicking on his/her name.

User Access Detail

Use this window to alter the selected User's access privilege.

Prerequisites

Super User responsibility is required.

Steps

1. In the Organization column, use the drop-down menu to change the organization for any listed compensation group.
2. Use the drop-down menu to select Update or View-only access for any row.
3. To remove a listing, check the Remove check box and click Update.
4. To add a new compensation group, enter the name in the blank field in the Compensation Group column at the bottom of the table.
5. Click Update to save new information, or if desired, or click Restore to retrieve the last saved information.

Email Alert Messages

Follow this procedure to customize alert messages that are emailed to salespeople. The messages are a method to prompt the email receiver to perform an action. Example, when a sales manager presses the distribute button, his directs will receive an email that prompts them to view and accept their compensation plan.

Prerequisites

Oracle Workflow Builder 2.5 installed.

Steps

1. Start Oracle Workflow Builder 2.5 and connect to the database by entering its name, user login ID and password.

2. In the Show Items Types window, select Compensation Plan Processing in the panel called Hidden. Transfer Compensation Plan Processing to the panel called Visible by pressing on the Visible button. Press OK.
3. On Oracle Workflow Builder 2.5 main window, expand the tree to view the approval process points that are represented by nodes. Expand the messages node. There are three messages for the sales force to view:
   - Accept Compensation Plan
   - Approve Compensation Plan
   - Distribute Compensation Plan
4. Select one of the messages for editing. For example, select Accept Compensation Plan.
5. In the Navigator Control Properties window, select Body tab.
6. Edit the standard text message to suit user requirements.
7. Press the save icon in the toolbar.

Guidelines

Workflow Attributes are commands to fetch actual values. Example, &FORWARD_FROM_NAME in the Body tab will enable the name of a user with Contract Approver responsibility to appear in the email alert. The Workflow Attributes can be identified as they are text expressed in capital lettering and preceded by &. It is advisable to edit message text around these Attributes and not to edit the Attributes themselves.

Workflow Background Process

Workflow background engine process needs to be scheduled so that the workflow notification process can run (refer to Workflow User Guide > Setup Steps > Setting Up Background Workflow Engines). To enable the notification process, the Workflow Background Process concurrent program has to be submitted from the Submit Request form.

In the parameters window enter the following parameters:

Item Type: Choose Compensation Plan

Processing:

Minimum Threshold: Ignore this field

Maximum Threshold: Ignore this field

Process Deferred: Choose Yes

Process Timeout: Choose Yes.

Schedule this concurrent program to run at regular intervals. For example, if notifications are required to be delivered every half hour, then set the schedule at 30-minute intervals and the Workflow Background Process will activate every 30 minutes and process any unprocessed items.

Notification Mailer

For email notifications to be sent, submit the Notification Mailer concurrent program as a concurrent process or from the command line. Before this, the notification mailer configuration file wfmail.cfg that is provided as a part of Oracle Workflow will need to be modified for your installation. Please look at the Workflow User Guide for details on how this can be done.

Setting Up Production Module

Window List for Production Module

The following table shows the menu and topic access to the production module.

Access from	Topic	
Menu bar: System	System Parameters	
	Find System Profile Values	
		System Profile Values
	Security Profile	
	Find Personal Profile Names	
		Personal Profile Values
	Oracle Sales Compensation Lookups	
	Descriptive Flexfield Segments	
	Segments Summary (new)	
		Segments (new)
Menu bar: Financial	Set of Books	

Access from	Topic		
		Closing	
		Journaling	
		Average Balances	
		Budgetary Control	
Menu bar: Financial		Multiple Reporting Currencies	
	Accounting Calendar		
	Period Types		
	Open and Close Periods		
	Currencies		
	Period Rates		
Financial Setups	Interval Type		
	Accumulation Period		
	Pay Periods		
	Credit Types		
	Credit Type Conversion Factors		
Menu bar: System	Tables		
		Columns	
		Dimensions	
		Classification	
		Primary Key	
		Collection	
			Source Tables
			Queries
			Mapping
			Actions
			Reporting
Revenue Classes	Revenue Class		
Hierarchies	Hierarchies		

Access from	Topic		
		Details	
			Import (sub hierarchy)
	Hierarchies: Dimension name		
Classification Rules	Ruleset		
	Rules		
		Rule Attribute	
		Build Expression	
Compensation Plans	Rate Table		
	Rate Dim en ion		
	Assignment		
	Formulas		
		General	
		Input	
		Rate Table	
		Output	
	Plan Element		
		General	
		Revenue Class	
		Formula	
		Rate Tables	
	Compensation Plans		
		Plan Elements	
		Salesperson Assigns	
		Sales Roles	
Menu bar: Tasks	Roles		
	Find Resources		
		Selection Criterion	
		Resource Search Results	

Access from	Topic	
		Resource Details
		Create Resource
	Resource	
		Default Values
		Roles
		Groups
		Teams
		Service
		Interaction Center
		Compensation
		Receivables
		Miscellaneous
	Define Groups	
		Members
		Roles
		Usages
		Relations
		Member Details
		Move Member
		Member Roles
	Define Teams	
		Members
		Roles
		Usages
		Member Details
		Member Roles
	Define Sales Roles	
	Pay Groups	

Access from	Topic	
		Pay Periods
		Salespeople
	Payment Plan	
	Salespeople Workbench	
		Salesperson (definition)
		Sales Role
		Compensation Plans
		Payment Plans
	Submit Request (Collection)	
	Calculation (Run)	
	Maintain Transactions	
		Basic
		Advanced
	Adjust or New Transaction	
		Move Credit
		Share Credit
		Deal Move
		Deal Split
		Commission Lines Window
		Transaction History
		Customer Address
		User Notes

System Setup Steps

The table below summarizes the steps necessary to successfully implement Oracle Sales Compensation. Further information detailing the implementation procedures is provided in the sections following the table.

Step	Action	Description
1.	Select a set of books	Use **System > System Parameters** to select a set of books set up in General Ledger
2.	Set up open/close periods	Use **Financial >Open and Close Periods**
3.	Activate periods	Use **Financial > Accumulation Periods** to assign **Future Enterable** for setting up plans and salespeople, or **Active** to process transactions.
4.	Copy periods from Oracle General Ledger to Oracle Sales Compensation	Use **Financial > Pay Periods** and select **Active** for each period in the general ledger you want to copy and use in Oracle Sales Compensation.
5.	**Financial > Define Interval Types**	Define quota intervals by assigning a name, selecting a calendar, and assigning an interval number to each period. Or, optionally, use the predefined intervals provided (Period, Quarter, Year).
6.	Define responsibilities	Optional. Default responsibilities are provided. Use **Security > Responsibility Define** to create custom responsibilities.
7.	Assign user responsibilities	Use **Security > Responsibility > Define** to set up user responsibilities.
8.	Define credit types	Optional. Use **Financial > Credit Types** to define additional non-monetary credit types, if needed.
9.	Set credit type conversion factors	Optional. Use **Financial > Credit Type Conversions** to set conversion factors for converting one credit type to another, such as to convert non-monetary credit types to your functional currency.
10.	Set collection parameters, salesperson batch size, and select Managerial Rollup	Use **System > System Parameters** to set the number of transactions to collect per batch, the number of transactions to transfer from the Collector to the Calculator, and the number of days to allow after payment due date before sales credit is taken back. Set the number of salesperson periods in a sales compensation calculation batch. Optionally, select **Managerial Rollup** to enable the rollup of credits through the compensation group hierarchies.
11.	Map tables for data collection	See Mapping.

Step	Action	Description
12.	Set rule batch size parameter in **System > System Parameters**	The Rule Batch Size parameter is used by the code generation program to determine how many PL/SQL packages should be created for a revenue classification. This parameter needs to be set because the PL/SQL compiler limits the size of the PL/SQL blocks and gives a "program too large" compilation error when this limit is exceeded.
13.	Create manual transaction reason codes	Optional. If you want reason codes identified for manual transactions, then set them up in the ADJUSTMENT_REASON lookup table. Use **System > Lookups.** See the *Oracle Application Object Library Reference Manual.*
14.	System > Security Profile	Optional. If you want to grant a manager security access to compensation information for salespeople not included in normal security for the manager, then set up the relationship using this window, if needed.

Defining the Calendar

To use Oracle Sales Compensation you must define the calendar and set of books on which you want to base your compensation periods. If you have already defined these in Oracle General Ledger, you need to identify this information in Oracle Sales Compensation.

Define the set of books in Oracle General Ledger (GL) using these forms:

Set of Books

Calendar

Period Types

Open and Close Periods

Key Flexfields

Select the set of books in Oracle Sales Compensation

A set of books identifies a company or fund within Oracle Applications that shares a common chart of accounts, structure, calendar, and functional currency. Oracle Sales Compensation processes sales compensation payments according to periods defined in a calendar associated with a set of books you define in Oracle General Ledger (see Oracle General Ledger Reference).

Prerequisites

None

Steps

1. Navigate to the system Parameters window, or by default choose System Parameters from the Setup menu.
2. Enter a name for your Oracle Sales Compensation instance.
3. In the Set of Books field, choose a GL set of books from the list of values, which Oracle Sales Compensation obtains from all sets of books you have defined.

You will then see displayed this information obtained from the GL books:

- Calendar associated with this set of GL books (view only, cannot be edited)
- Period Type associated with this set of GL books (view only)
- Currency associated with this set of books

4. Define the Collector Set of Books. You must be in the collector instance, and from the System parameters window pick the same set of books as you are using in your Oracle Receivables source.

Open and close periods in Oracle Sales Compensation

To administer Sales Compensation periods, set up your periods to the Future Enterable state. When you are ready to calculate the sales compensation payments, open the appropriate accounting period. You may close an accounting period after you have calculated and paid the compensation, or you may leave multiple periods open if you expect to make adjustments for prior periods.

Oracle Sales Compensation uses period information for these functions:

- Compensation plans and plan elements
- Compensation plan assignments
- Period targets
- Payment Plans
- Hierarchies
- Salesperson rollup structure
- Adjustments to sales credits
- Account adjustments to subledger account balances

- Employment start and end dates

Steps

1. To change period status, navigate to the Periods window, or by default, choose Periods from the Administration menu.

   Oracle Sales Compensation displays the following period information:

   - For System Status: INACTIVE (never opened) or ACTIVE (permanent status after a period has been opened)
   - Name, Year, Quarter, Start Date, End Date
   - Default value for Period Status is Never Opened, but it can change to:

     Open, Closed, Permanently Closed, Future-Entry
   - Status Code for salespeople for the period: unclassified (no activity or not yet recalculated after changes), classified (one or more salespeople failed the population process), populated, calculated.

     Note: Changing a revenue class, salespeople, or classification rules hierarchy or a compensation plan automatically changes the period Status Code to Unclassified and you must recalculate the period.

2. Select the period and then choose a period status: Future Enterable, Open, Close Permanently, Close

   When changing the period status you can change a Never Opened period to Future Enterable and then to Open. You can close an Open period and open a Closed period.

   You cannot change a Permanently Closed period.

   Note: once you permanently close a period, you cannot reopen it and no transactions of any kind can be processed. Be sure that there are no new transactions, adjustments, takebacks, payments, or any other outstanding transactions before you permanently close a period.

Setting Up Collections

Two major processes are required to compute sales compensation: data collection and compensation calculation.

As a data collector, Oracle Sales Compensation provides the means to collect data from Oracle Receivables, Oracle Order Capture, or other data sources and to

prepare that data to be transferred to the Oracle Sales Compensation calculation processes.

Collecting Transaction Data

To collect transaction data, specify the transfer batch size in the System Parameters form. A typical collection batch size is 2000 transactions, but that depends on your system.

Setting Up A New Transaction Source

For each Transaction Source there are three pieces of information:

- Name: user-defined and changeable, and may include legacy sources.
- Type: the short-name of the Transaction Source. User-defined, must be unique and cannot be changed.
- Status: Complete/Incomplete. This indicates whether the Collection package has been generated for the Transaction Source since the latest setup changes were made.

The Tables window contains five tabs: Source Tables, Queries, Mapping, Actions, Reporting. Use these tabs as described here.

Source Tables

This tab is used to specify all tables that are used during the *creation* of compensation transactions, that is, the Direct Mapping tables. Supply the required information in each field.

- A Line table is mandatory. It contains the line items against which compensation is to be paid. L_ORDER_LINES has been designated as the Line table.
- The Key Column is mandatory: it is the field in the table that uniquely identifies each line.
- Specify any additional tables to be used in creating compensation transactions in the Extra Direct Tables List.
- Optional Header Table area, in which the L_ORDER_HEADERS table has been specified. (The reason for this will be explained under the Queries tab.) If you specify a Header Table, also specify a Key Column for it and in the Line Table Header Identifier specify the field in the line record (foreign key) which allows it to be joined to the Key Column of the Header Table.

Guidelines

Before using any table, be sure that table is registered using the Tables form (below). Table aliases are system-defined. These are the values that you must use if you refer to a table by its alias.

The Tables and Columns form requires the table name, user name, alias (which is automatically generated), and description, and whether it is to be used in a calculation.

For the Columns tab you must supply user column name, indicate data and type length.

Queries

Within this tab the significance of the information entered in the Source Tables tab becomes apparent. The capability for querying depends on the information entered into the Source Tables. You can generate a list of transactions that are eligible for compensation using the Notification Query and Parameters.

Notification Query

This query joins together the mandatory Line table (L_ORDER_LINES) and the optional Header table (L_ORDER_HEADERS). It is necessary to specify a header table, even though the purpose of Notification is to get a list of identifiers from the Line table. The reason for this lies in the additional criterion which has been added to the end of the WHERE clause:

AND loh10000.booked_date BETWEEN p_start_date AND p_end_date

This restriction means that the user wants to collect only the orders that were booked between a specific start and end dates. The booked date of the order resides in the Order Header, so it is necessary to bring the L_ORDER_HEADERS table into the Notification Query to allow this. This requirement often applies, so the Header Table field on the Source Tables is provided to enable this match without the need for advanced SQL knowledge.

P_start_date and p_end_date are parameters whose values are set by the user before collections is run for this Transaction Source. Although the parameters must be registered on this tab, their runtime values are set on a different form (*Setup -> Collection Parameters* menu option). A separate form is used because for any changes made on the Collections form to take effect, it is necessary to regenerate the collections package, whereas the parameter values can be changed without needing to regenerate.

Collection Query

The list of tables in the Collection query FROM clause (the **Direct Mapping** Tables) consists of the Line table, the (optional) Header table and all of the tables listed as Extra Direct Tables on the Source tables tab.

The WHERE clause of the query already contains the necessary join information to get the right rows from the Line and Header tables. The user is required to complete the WHERE clause with all the join information necessary to get the right rows from the Extra Direct tables.

Once the information on the Queries tab is entered, you have completed all the setup necessary to build a correct set of compensation transactions from the source tables in your legacy system. The next step is to define what information will actually be stored in the compensation transaction. That is the function of the Mapping tab.

Mapping

Use the Mapping tab to specify what data is needed to fill each destination column when a compensation record is collected from the Transaction Source.

When you move to the Mapping tab for the first time after creating a new Transaction Source, you will see that the Source / Destination list on this tab has been pre-populated with a number of records. These records are the mappings for the mandatory Destination Columns, those columns in CN_COMM_LINES_API that must always be filled before a CN_COMM_LINES_API record can be imported into Oracle Sales Compensation. Examples of mandatory columns are Employee_ Number, Transaction_Amount, Transaction_Type and Source_Doc_Type. You cannot delete these mandatory mappings.

In some cases the Source Field for the mapping, that is, the description of the data used to fill the Destination Column, has been pre-populated and cannot be updated. An example of this is the mapping for Source_Doc_Type, which is set to be the Type that you enter when you name the Transaction Source (‘LEG’ in our example). Most Source fields are left blank though and you have to define the source data for these mappings. You can not generate a Collection package if any mapping has a blank Source (although you can enter the value NULL in the Source field if you need to).

The Source field can contain a simple column specification or any other valid SQL expression. Each of the following is potentially a valid Source value:

NULL	NULL value

'My Text'	literal value
booked_date	column_name
l_order_headers.booked_date	table_name.column_name
loh10000.booked_date	table_alias.column_name
NVL(lol10001.ordered_quantity, 0)	SQL function
my_function(loh10000.booked_ date,lsc10002.salesrep_id)	user function

Direct and Indirect Mappings are set up differently. A description of each follows.

Direct Mappings

Direct Mappings are those where the source data is derived exclusively from one or more tables in the FROM clause of the Collection Query (any table listed on the Source Tables tab).

If the Source data does not include any database information at all--if it is just NULL or a literal value --then this can also be regarded as a Direct Mapping.

To define a Direct Mapping, type the appropriate SQL expression into the Source field. A Direct Mapping is simply incorporated into the Collection Creation query that was described earlier. This single SQL statement already knows how to join all of the Direct Mapping tables together, so you need to define only what column information (if any) you need from these tables.

Notice that all seven of the example expressions above refer either to no table data at all, or only to columns from one of our Direct Mapping tables. These are therefore valid Direct mappings in the context of our example setup. Suppose for example that for the *Quantity* Destination Column, you want to use **NVL(lol10001.ordered_ quantity, 0)** as the Source value. All you would need to do is type exactly this text into the Source field for that mapping.

Although you can type this text directly into the Source field, this approach is potentially error-prone. You need to spell the column name (*ordered_quantity*) correctly and you should normally precede that with either the full name of the source table (*l_order_lines*) or the exact alias of the table (*lol10001*). Instead of this manual procedure, you can press the Source Builder button to get a List Of Values (LOV) to help you.

The required Source field text, for example, can be created as follows:

1. Type **NVL(**in the Expression field.

2. Click the Table Name LOV. The names of the Direct Tables are listed.
3. Select **L_ORDER_LINES**.
4. Click the Table Name LOV. The names of the L_ORDER_LINES columns are listed.
5. Select **ORDERED_QUANTITY**
6. The text lsc.amount is appended to the expression field
7. Type**, 0)** at the end of the Expression field
8. Click Apply. The dialog disappears and the full expression is now pasted into the Source field.

Alternatively, you can use Source Builder to paste the **lol10001.ordered_quantity** text into the Source field and then build the rest of the expression up in the Source field itself.

Indirect Mappings

They are implemented as UPDATES to the existing CN_COMM_LINES_API record you need to define the FROM and WHERE clauses of this UPDATE statement. There are two ways that this definition is performed, the Free-Form Indirect Mapping and the Relationship Indirect Mapping.

With a Free-Form mapping you must type in the exact FROM / WHERE clause manually on the Mapping tab. With a Relationship Mapping you first use the External Tables form to define a join relationship between CN_COMM_LINES_API and the table from which the source data is to be collected. Then on the Mapping tab you specify this join relationship in the Relationship field. The FROM / WHERE field then becomes read-only and is automatically set according to that Relationship definition.

In the example in the *Concepts* section, we wanted to store the salesperson territory in the Attribute1 field of CN_COMM_LINES_API. The territory can be taken from L_TERRITORIES, using the Salesrep_ID, which is also present in the L_SALES_CREDITS table.

The first requirement to implement this is to set up a Direct Mapping which stores the Salesrep_Id from L_SALES_CREDITS. Set up the Direct Mapping as follows:

1. Create a new record in the mappings list.
2. Enter **lsc.salesrep_id** in the Source Field.

3. In the Destination field select a spare column, like Attribute99, from the LOV DO NOT use the Salesrep_ID destination column: the reason why is explained later in *Mapping the Employee Number*.

A **Free-Form** Indirect Mapping for Territory can be set up as follows:

1. Create a new record in the mappings list.
2. Enter **FROM l_territories lte WHERE lte.salesrep_id = api.attribute99** in the FROM / WHERE field.
3. Enter **lte.territory_name** in the Source field. Note that if you use Source Builder to do this, the Table Name LOV will list all of the tables that are currently registered (in Tables & Columns) in Oracle Sales Compensation. This is because the FROM clause is free-form text which could contain multiple tables. It is easier to list all the tables for the user to choose from than to try to extract table names out of the FROM / WHERE clause.
4. In the Destination field select Attribute1 from the LOV.

Alternatively, a **Relationship** Indirect Mapping for Territory can be set up as follows:

1. Use the External Tables form to set up a join relationship. In this relationship the Source Table is L_TERRITORIES and the Destination Table is CN_COMM_ LINES_API. The Source Column is *Salesrep_id* and the Destination Column is *Attribute99*.
2. Go back to the Mappings table of the Collections form. Create a new record in the mappings list.
3. Use the LOV on the Relationship field to select the relationship that you have just set up. The FROM / WHERE clause is now automatically populated.
4. Enter **lte.territory_name** in the Source field. Note that if you use Source Builder to do this, the Table Name LOV will list only L_TERRITORIES because this is the source table for your chosen relationship.
5. In the Destination field select Attribute1 from the LOV.

Whether you set this up as a Free-Form or a Relationship mapping, you will see that the following text is displayed beneath the Relationship field:

UPDATE cn_comm_lines_api api SET attribute1 = SELECT lte.territory_name

The FROM / WHERE field completes the statement:

FROM l_territories lte WHERE lte.salesrep_id = api.attribute99

This shows you in SQL terms exactly how your Indirect Mapping will be physically implemented. If you look back to the screen shot at the start of the Mapping section, you will see that it shows the use of a Free-Form Indirect Mapping to populate Attribute1.

Indirect Mappings: **Free-Form or Relationship.** When should you use a Free-From Indirect mapping and when should you used a Relationship mapping?

The Relationship Mapping is more restrictive than the Free-Form version. On the External Tables form you can only define simple equivalence joins between tables, which means joins of the form:

```
WHERE table1.columnA = table2.columnB
AND table1.columnC = table2.columnD
```

This rules out the use of other tests such as OR, BETWEEN, <, != and so on as well as the use of functions such as NVL and the outer join operator.

A relationship also only allows you to join to a single Indirect table. If you need to join multiple tables together then you cannot use the Relationship option, unless you create a custom view to hide the join.

In the cases described above, the Free-Form mapping is therefore the one to choose.

There is no occasion where you actually have to choose a Relationship mapping over a Free-Form one. Relationship mappings would be chosen because of setup simplicity (they can be re-used in multiple mappings) and maintainability.

Mapping the Employee Number. The salespeople used by Oracle Sales Compensation are set up using Oracle Resource Manager. When you define resources in Oracle Sales Compensation, you are actually using Resource Manager windows. The Sales Credits which are managed and calculated within Oracle Sales Compensation are linked to their owning salesperson using the Salesrep_ID allocated for the salesperson by Resource Manager.

The problem which arises when importing transactions from a legacy system is that the Salesperson Identifier on a legacy record will not match the Salesrep_ID for that person which was allocated when he/she was registered in Oracle Sales Compensation. The Resource Manager Salesrep_ID is an internal key which is not visible to the user and is also non-updateable.

A way is therefore provided to make this link between 'Legacy' salespeople and Oracle Sales Compensation salespeople. The solution is as follows:

When creating a new Resource in Oracle Sales Compensation, one of the fields to be filled in is 'Resource Number'. In this field you should record the user-visible unique identifier that this person has in your legacy system.

On the Mappings tab set the Source of the mandatory 'Employee_Number' mapping to be person identifier column from your legacy system.

When records are subsequently imported from CN_COMM_LINES_API into Oracle Sales Compensation, **if the CN_COMM_LINES_API.Salesrep_ID column is blank**, the load program will take the value in CN_COMM_LINES_API.Employee_Number, find the individual in Resource Manager whose Resource Number is equal to that value and then populate CN_COMM_LINES_API.Salesrep_ID with the Resource Manager Salesrep_ID for that individual.

Actions

The Actions tab allows the user to change the Collection processing for their Transaction Source in two ways, either by specifying the Transaction Filters or by adding User Code Blocks. Transaction Filters are more relevant in conjunction with the pre-defined Transaction Sources of Receivables and Order Management, so they will be discussed later.

User Code Blocks are single or multiple PL/SQL statements which you can choose to have inserted at defined points within the Collect procedure that will be generated for your Transaction Source. You can insert User Code Block at three locations:

Pre-Notification: the beginning of the procedure

Post-Notification: between running the Notification and Collection queries

Post-Collection: after the Collection query has been run

To create a User Code Block, choose the required Location from the selection list and then type your statement(s) in the Code field.

Reporting

When the preceding setup is complete, you are nearly ready to press the Generate button and create your Collections package. However, since pressing that button will replace the existing version of the package with a new one based upon the current setup, test first whether this new package is valid. The Reporting tab enables you to test the validity of the new package.

When the Test Generate button on this tab is pressed, a test version of the Collection package is generated for the selected Transaction Source.

The Error Text field lists compilation errors in the generated package together with their line numbers. The Package Text field displays the entire code, with line numbers, for the package. This way, if any errors are listed for the package, you can easily find the offending line of code in the Package Text field.

The usual cause of a compilation error is invalid SQL which has been typed in on the Queries or Mappings tabs or, as in the window above, in a User code Block. It is easy to identify such problems on the Reporting tab, go back and fix them and then re-run the test generate.

Hint: when you look at the Package Text, click the field and then click the Edit Field icon in the toolbar. This brings up the contents of the field in a resizeable window so that you can see more lines and greater line width.

Apart from finding compilation errors, the other main use of this tab is to allow you to scan through the generated package and confirm that it is doing what you had intended when you set up the information on the other tabs. It enables you, for example, to see exactly where in the Collect procedure your User Code Block(s) will be executed.

Running Collections

When you are satisfied with the results of a test generation, press the Generate button to create the real Collection package for your Transaction Source.

It is recommended that you actually run the package to collect transactions. This is accomplished by the *Collect Custom Transaction Source* Concurrent program. This program requires you to enter a single parameter, the name of your Transaction Source. The LOV on this parameter lists all custom Transaction Sources that have been set up.

Remember that if you created any parameters on your Queries tab, you do not set their values on the Concurrent Program run form. You have to use the Collection Parameters form to set their runtime values before you call up the Concurrent Program.

The final action required to pull these transactions from the API table into Oracle Sales Compensation is to run the Transaction Interface Loader concurrent program, or to press the Load Transactions button on the Maintain Transactions form.

Setting Up A Standard Transaction Source

Oracle Sales Compensation is delivered with two pre-defined Transaction Sources: Oracle Receivables and Oracle Order Capture.

The setup of Collections for these Transaction Sources is very similar to the setup of new user-defined Sources. The difference is that for the Standard Transaction Sources you cannot make any changes to the Source Tables or Queries tabs. This is because collection from Receivables and Order Capture is implemented as complex procedural logic rather than as simple Notification and Collection queries and it is not possible to express that logic on the Queries tab.

Both the Standard Transaction Sources are delivered with a set of mappings to populate the important columns in CN_COMM_LINES_API. You are allowed to change Source values for these mappings and also to create new mappings of your own.

When you first display the **Mappings** tab for a Standard Transaction Source, the Inherited column will display === for every mapping. This tells you that the mapping is a standard one and has not been changed. If you change the value in either the Source, Relationship or FROM / WHERE field for a standard mapping, the Inherited column will change to display =X=. If you want to revert a mapping to its original standard setup, press the *Inherit* button. The Source, Relationship and FROM / WHERE fields change back to their original values and the Inherit field reverts to ===.

If you create any new mappings, the Inherited column is blank for these rows and the Inherit button has no effect.

Using Filters

Since you cannot access the Queries tab for a Standard Transaction Source, you cannot change the collection query to filter transactions that you do not want. This is why the **Filters** on the **Actions** tab are useful for these Transaction Sources.

Filters allow you to define criteria for the removal of unwanted transactions. Suppose for example you do not want to compensate people for any transaction with a value of less that $100 (we will assume that all your sales are in dollars). You can specify this on the Actions tab simply by entering the text *api.transaction_amount < 100* on a line in the Filters section of this tab.

Alternatively you can press the Clause Builder button to help you build this expression. Clause builder works in the same way as the previously described Source Builder, except that you do not choose a table, since the filter always applies to a column in CN_COMM_LINES_API.

You can also decide which method of filtering should be carried out for your Transaction Source, using the radio button in the Filter section. If you select Physical Delete then filtered transactions are physically deleted from CN_COMM_LINES_API. If you select Mark As Filtered, the transactions are not deleted - they are marked as FILTERED and are never imported into Oracle Sales Compensation.

Receivables and Order Capture Special Features

Oracle Receivables

The pre-defined Receivables data source differs slightly from any other data source because it really represents four Transaction Sources which have been combined into one, so that they can share a set of Mappings. The four sources are referred to as Receivables Events and are as follows:

- Invoices, Credit Memos and Debit Memos
- Take-backs (once an invoice due date goes beyond the set grace period, the credit for the sale is deducted from the salesperson's sales credit)
- Payments and Givebacks (a Giveback is a past due invoice that had been Taken Back but has now been paid)
- Write-offs

These events occur when the relevant transaction is posted to the Oracle General Ledger application.

The Transaction Collection Queries for these Events are all based around the same core set of Receivables source tables, but the tables are joined together in different ways so four different Transaction Sources would normally be required. The four have been combined into a single Transaction Source so that you set up only the Mappings that you want once and they are applied to the collection of Compensation Transactions for all four Events.

When you press the Generate button for the Receivables Transaction Source, four packages will be generated, one for each Receivables Event. This generation takes four times as long as for any other Transaction Source. However, you may not be interested in all these Events. It is therefore possible to restrict the generation to only those packages for the Events that you require. When the Receivables Transaction Source is selected, a special table appears on the top-right corner of the window. Use this table to select Events. When the Generate button is pressed the full package will be generated.

Each Receivables Event has a dedicated Concurrent Program. Each of these requires two parameters - a Start Period and End Period. The parameter entry is supported by a List Of Values. The Concurrent Programs are as follows:

- Collect Invoices
- Collect takebacks
- Collect Payments And Givebacks
- Collect Writeoffs

Oracle Order Capture

Compared with Receivables, the Order Capture Transaction Source behaves more like the user-defined Transaction Sources which were defined earlier.

A single Collection package, Collect Orders, is called by a dedicated Concurrent Program. The Concurrent Program requires two parameters, a Start Period and End Period. The parameter entry is supported by a List Of Values.

Although this Transaction Source collects from Order Capture, the transactions actually originate in the Oracle Order Management product. Order Capture just acts as an interface. The transactions themselves are sales credits for Orders which have reached the *Booked* status in Order Management.

Adjustments

Order information can be, and often is, changed after the Order has been set to the status of Booked. Such changes, known as adjustments, can be automatically applied to transactions which have already been Collected. If a change is made to any Line on an Order then all of the Sales Credits (Compensation Transactions) for that line are considered to be changed. There are two possible scenarios:

- The Compensation Transactions have been Collected but have not been Loaded into Oracle Sales Compensation.
- The Compensation Transactions have been Collected and also Loaded into Oracle Sales Compensation.

In Scenario 1, the transactions have only got as far as the CN_COMM_LINES_API table. In such cases the original transactions are marked OBSOLETE and they will be re-collected into CN_COMM_LINES_API with their new values the next time Collect Orders is run.

In Scenario2, the transactions are already inside Oracle Sales Compensation and may have even been used to calculate salesperson commission. This requires a different approach. The original transactions in CN_COMM_LINES_API are marked FROZEN. For each of these a reversing transaction is also created in CN_COMM_LINES_API. This is a duplicate of the FROZEN line, but with an opposite polarity (usually meaning it becomes negative) on the Transaction Amount. This transaction will have the effect of reversing out the original. Finally, as in scenario 1, the Compensation Transactions for this line will be re-collected into CN_COMM_LINES_API with their new values the next time Collect Orders is run.

Each time Collect Orders is run, the list of unprocessed updated Order Lines must first be processed. This can take rather a long time. To avoid having a long wait when running Collect Orders, it is a good idea to process this list of updated Order Lines at regular intervals (perhaps daily). There is a Concurrent Program to do this, *Order Update Notification*.

The list of updates to Orders is maintained for Oracle Sales Compensation by the Order Capture application. This however only occurs if Order Capture has been informed of this requirement. You must register Oracle Sales Compensation with Order Capture as follows:

1. Switch Responsibility to Oracle Order Capture
2. Open the Lookups form
3. Display the ASO_ORDER_FEEDBACK_CRM_APPS lookup type
4. If it is not already there, create a row with Code **CN,** Meaning **Sales Compensation** and check the Enabled box. Save this row.

Coping With Adjustments You can cope with adjustments to transactions in your custom Transaction Sources in the same way as standard Collections from Order Capture does. All you need to do is to call a Collections API, identifying the transaction that has been changed.

If you specified a Header Table on your Source Tables tab then you need to pass the unique identifiers of both the Header record and the Line record of the changed transaction. Otherwise only the identifier of the Line record is required.

Suppose that Collections has already been run for October 2000 transactions in our example legacy system. We have also imported those transactions into Oracle Sales Compensation. Now a change is made to one of the orders for that month. The ID of the Order Header is 1001 and the ID of the Order Line is 1234. To notify Oracle Sales Compensation of this change you make the following call:

CN_NOTIFICATION_PUB.Create_Notification

(p_api_version	=>	1.0,	
x_return_status	=>	l_return_status,	-- OUT parameter
x_msg_count	=>	l_msg_count,	-- OUT parameter
x_msg_data	=>	l_msg_data,	-- OUT parameter
p_line_id	=>	1234,	-- Line Table Id
p_source_doc_type	=>	'LEG',	-- Transaction Source Type
p_adjusted_flag	=>	'Y',	-- Adjustment(not new record)
p_header_id	=>	1001,	-- Header Table Identifier
p_org_id	=>	your_org_id,	-- Operating Unit (optional)
x_loading_status	=>	l_loading_status	-- OUT parameter
);			

The next time Collections is run for this Transaction Source, reversing transactions will be created to nullify all sales credits associated with this transaction line. All sales credits will then be collected again with the new values in. This reversal and re-collection of the October transaction will occur even if you specify that you want to collect only November transactions this time.

Note: To understand the p_org_id parameter, you need to first understand the Oracle Applications 'Multi-org' strategy, which allows data for multiple operating units to exist, partitioned from each other, within a single database. Discussion of Multi-org is beyond the scope of this document. If you do not understand this concept then please consult the appropriate documentation before trying to understand the rest of this paragraph. If your procedure which calls *CN_NOTIFICATION_PUB.Create_Notification* is running in a database session where the Org-Id has been set, and your procedure is only dealing with transactions for this Org-Id, then you can omit the p_org_id parameter. In any other situation (for example where you have a single procedure or database trigger which detects updates to transactions from multiple Org-Ids) you must specify the correct value of p_org_id for the transaction when you call *Create_Notification*.

Adjusting Transactions

If a collected transaction contains errors in information or credit assignment, then it can be corrected with an adjustment. Use this procedure to adjust a transaction or change who is credited with the transaction.

Prerequisites

Super User or Analyst responsibility is required.

The application has collected the transaction.

Steps

1. In the Tasks menu, choose **Adjustments.**

   The Maintain Transaction window appears.

2. Conduct a Find.

   A list of transaction records appears.

3. Select the transaction record you want to adjust.

4. Click **Adjust Transaction.**

   The Adjust Transaction window appears.

5. If you want to make a simple manual adjustment, then enter the adjustment information and save. If not, then go on to step 6.

6. Click the correct button for the type of adjustment you want to perform:

   - **Move Credits**

     The credit moves from the existing credited salesperson to a salesperson you specify.

   - **Share Credits**

     The original salesperson's credit remains the same, but you also give the credit to a salesperson you specify.

   - **Deal Split**

     You specify additional salespeople and the percentage of credit each salesperson receives for the transaction. The percentages must total 100.

   - **Deal Move**

     Credit for the whole transaction is removed from the existing credited salesperson to a salesperson you specify.

   - **Deal Share**

     The original salesperson's credit remains the same, but you also give the credit to a salesperson you specify.

7. Enter the appropriate information.
8. Click **OK.**

Guidelines

You can create a new manual transaction by selecting **New Transaction.**

You cannot split a nonrevenue, obsolete, frozen, or reversal transaction.

If a transaction has not yet been collected, then you can adjust the order or invoice directly. The correct transaction credit information is then collected by the application.

You can adjust more than one record at a time.

Setting up Classification

Creating Revenue Classes and Hierarchies

Revenue classes are user-defined categories of business revenue used to determine whether a sales credit is applied toward a compensation payment. A hierarchy composed of broader revenue classes at the top, or root, with subclasses as children of the root, make it possible to pay compensation for broader revenue classes without specifying all possible subclasses in a compensation plan. Use this procedure to define your revenue classes and build hierarchies of revenue classes.

Categorizing Your Sales Revenue

You begin defining revenue classification by identifying your organization's revenue classes and then defining these classes in Oracle Sales Compensation.

What Is a Revenue Class?

A **revenue class** is a user–defined category of sales for which your organization awards compensation. Each revenue class represents a different type of sale for which your organization pays compensation. Thus, different companies have different revenue classes because each sales organization awards compensation differently. After defining your organization's revenue classes, you assign one or more revenue classes to a compensation plan and assign the plan to a salesperson. By assigning revenue classes, you specify the types of revenue for which each salesperson can earn compensation.

Many companies award compensation based on the types of products or services its salespeople sell. Depending on the business practices of your sales organization, you might award compensation based on factors other than products or services sold. For example:

- Your sales organization might have customer account teams, where salespeople only receive compensation for sales to their assigned set of accounts. In this case, each customer account is probably a separate Oracle Sales Compensation revenue class.
- Your company might organize its sales strategy around expansion into new markets, where each new market is defined as a separate revenue class.
- Your company might use industry–based sales compensation, paying compensation only for sales made in a salesperson's assigned set of industries.

For a specific example, Global Computers awards compensation based on the types of products or services its salespeople sell. At the broadest level, the company sells PCs, peripherals, education services, consulting services, and support maintenance services. While some types of salespeople, such as resellers, are only authorized to sell a subset of this offering, the company awards compensation to some of its salespeople for all types of products and services. Thus, for Global Computers, each product or service category is an Oracle Sales Compensation revenue class.

Defining a Revenue Class

A **revenue class** is a user-defined category of sales for which your organization awards compensation. Many organizations award compensation based on the types of products and services they sell. In that case, the products and services are grouped into revenue classes and arranged into hierarchies with broader categories at the top, or root, of the hierarchy.

When matching the revenue class on a compensation transaction, such as a sales order, to a revenue class on a salesperson's compensation plan, the class of the transaction is rolled up in the revenue class hierarchy to determine matches to any revenue class on the plan.

All revenue classes on the same plan element share the same quota and compensation rate table. If revenue classes in a compensation plan have different quotas or are paid according to different rate tables, you must create a plan element for each revenue class that has a different quota or compensation rate.

Use this window to create Revenue Classes.

Prerequisites

None.

Steps

1. In the Navigator, choose **Classification Rules** > View By **Revenue Classes.**
2. In the hierarchy, right-click **Revenue Classes** and choose **New.**

   The Revenue Class window appears.
3. Enter the names and descriptions for all revenue classes you have identified.
4. Select a Liability Account and Expense Account, if applicable.
5. Save your work by clicking **File** in the toolbar and **Save** in the drop down menu.

Revenue Class Hierarchy

Use this window to assemble Revenue Classes into hierarchies.

Prerequisites

Revenue Classes have been created.

Steps

1. In the hierarchy, double-click **Revenue Classes.**

   The Hierarchies window displays the revenue class hierarchy type.
2. Enter a name for your hierarchy.
3. Enter the start and end dates for the hierarchy.
4. Save your hierarchy.
5. Click **View Details.**

   The Hierarchies window displays the existing available root classes. The application provides a default root class called Base Node.
6. Enter one or more root class names.

   When you select the root name, it appears in the large box. A plus sign next to the name in the box indicates you can click it to expand and view the hierarchy that is part of the selected root. You can expand and view any level of the hierarchy.

7. In the large box, select the parent revenue class for which you want to add a child.
8. Click **Add.**

   The Hierarchy Elements window displays the existing children for the selected revenue class.
9. Use the list of values to add a revenue class.
10. Click **OK.**

    The added revenue class appears in the hierarchy.
11. Repeat from step 6 to step 11 to build your hierarchy.
12. Save your work periodically and again before you exit the window.

Guidelines

You can create as many hierarchies as you need. However, only one hierarchy can be effective at any given time.

You can import any portion of another hierarchy to become a child of your selected node in the hierarchy you are building.

Creating Classification Rules

A classification ruleset is used to classify sales transactions to determine the appropriate revenue class for the transaction. Using the revenue class, a transaction is matched with a compensation plan and a compensation amount to be paid for the transaction is calculated. Use this procedure to define a set of attributes and values that uniquely identify each revenue classification.

Guidelines

Name your rules after the revenue classes they describe. Rules do not require unique names.

Tables

Use this window to define the descriptive flexfields in CN_COMMISSION_ HEADERS table.

Prerequisites

Super User responsibility is required.

Steps

1. From the Menu bar, choose **Toolbar** > **System** > **Tables and Columns**.
2. Place the cursor on the first line in the Schema column. Find the CN Schema and the CN_COMMISSION_HEADERS table.
3. You can use descriptive flexfields ATTRIBUTE1 through ATTRIBUTE100 in the CN_Commission_Headers table to classify a transaction into a revenue class. In order to use the flexfield, Classification Value must be selected for the column using the Tables and Columns function.
4. The Column Datatype must also be set to either numeric or alphanumeric (the default is alphanumeric).
5. You can also specify a Valueset Name. The valueset should be table validated. The values in the specified valueset are used in the Value field instead of unvalidated data entry when you are defining a rule attribute. Value sets can be defined through Application Developer and System Administrator responsibilities. See Oracle Application Object Library manual.

Flexfields

A flexfield is a field made up of subfields, or segments. There are two types of flexfields: key and descriptive. Sales Compensation uses descriptive flexfields, which provide customizable "expansion space" on forms.

In the current version of Sales Compensation there are 13 flexfields, as listed in the table below. See the *Oracle Applications Flexfields Guide* for information about setting up flexfields.

Flexfields	
Commission Headers	CN_COMMISSION_HEADERS_ALL
Commission Lines	CN_COMMISSION_LINES_ALL
CN Compensation Plans	CN_COMP_PLANS_ALL
CN Quotas	CN_QUOTAS_ALL
CN Quota Rules	CN_QUOTA_RULES_ALL
CN Rate Tables	CN_RATE_SCHEDULES_ALL
CN SRP Comp Plan Assignments	CN_SRP_PLAN_ASSIGNS_ALL
CN SRP Quota Assigns	CN_SRP_QUOTA_ASSIGNS_ALL

Flexfields	
CN SRP Quota Rules	CN_SRP_QUOTA_RULES_ALL
CN Trx	CN_TRX_ALL
CN Trx Batches	CN_TRX_BATCHES_ALL
CN Trx Lines	CN_TRX_LINES_ALL
CN Trx Sales Lines	CN_TRX_SALES_LINES_ALL

Defining Other Dimensions

Steps

1. Ensure that the table you base your dimension on exists in the database by navigating to the Dimensions window and selecting the list of values in the Base Table field.

   By default, choose Dimensions from the Setup menu to open the Dimensions window.

2. Define the dimension table in the Oracle Sales Compensation using the Tables and Columns form (Setup> Tables and Columns). Enter the table name and column names. The dimension table must have a Primary Key and a column that stores the actual dimension values.

3. Open the Dimensions window again.

4. In the Name field, enter the name of the new dimension.

5. In the Base Table field, enter the name of the table for the new dimension or select the table name from a list of values. (If a table has a dimension based on it already, it will not appear in the list of values for this field.

6. In the Primary Key field, enter the name of the column defined as the Primary Key in this table (as defined in the Tables and Columns form).

7. In the Dimension Values field, enter the name of the column that stores the values that will appear in the hierarchies.

8. Define one or more hierarchies for this dimension and save your work.

Ruleset

Use this window to create a classification Ruleset and Account Generation.

Prerequisites

Revenue Classes have been created and the user-defined flexfields of the CN_ COMMISSION_HEADERS table have been defined.

Steps

1. In the Navigator, choose **Classification Rules >** View By **Classification Rules.**
2. In the hierarchy, right-click **Classification Rules** and choose **New.**

   The Ruleset window appears.
3. Specify a name for your set of classification rules and assign active start and end dates.
4. Select Revenue Classification type or Account Generator.
5. Save the ruleset.

   The new ruleset appears in the Navigator.
6. Close the Form and return to the Navigator.
7. Right-click the ruleset that you have just created and select Add new child Rule.

   The Rules Form will appear.
8. Define your classification rules on the Rules Form and return to this Form when completed.
9. For every Ruleset that has new or changed rules, click **Synchronize**.

   Ruleset Status displays either **Complete** if the currently defined revenue classes and rules have been synchronized, or **Incomplete** if you have made changes in your definitions since they were last synchronized.

   When you click **Synchronize,** the classification rules package is automatically installed in the database using the concurrent program named Install Classification Rules Package.

Guidelines

You can define multiple date-effective classification rulesets. Ruleset active dates may not overlap.

A hierarchy of rules can be defined for each ruleset.

Every rule must have at least one attribute.

A rule may or may not have a revenue class. If the rule does not have a revenue class, then its children rules must define the revenue class. If a rule has a revenue class, then the revenue class is assigned to the transaction only if none of its child rules match the transaction.

If you specify high and low values in a rule condition, the values can be alphanumeric.

***Hierarchy Values*:** Selecting this option allows you to enter the value in the hierarchy you want to match. The fields that appear are Hierarchy and Hierarchy Values**.** If the value of the transaction attribute rolls up the hierarchy to the value you specify, then the compensation transaction satisfies the condition.

***Not*:** Specify the inverse of a value you defined by checking Not. The compensation transaction satisfies the condition if the attribute is not equal to the specified value, is not between the range of values specified, or does not roll up to the specified ancestor value.

When you add rules and revenue classes, you must synchronize the new rule and revenue class definitions before they can be used in compensation plans. You do not need to synchronize if you only rearranged the rules.

Always customize the classification rules using the setup forms available. Do not modify the generated PL/SQL code.

Troubleshooting

When a transaction fails classification for a rule that uses hierarchy values, the most common problem is that the primary key value in the transaction attribute column is not the same as the primary key value defined in the hierarchy (the value for the EXTERNAL_ID field).

Rules

Use this window to define the classification rules.

Prerequisites

Classification Ruleset has been created.

Steps

1. In the Navigator, right-click the **Ruleset** that you have just created and select **Add New Child.**

   The Rules window appears.

2. Assign a name to the rule that you are about to define.
3. Select a revenue class from the list of values. Optionally select Expense & Liability account.
4. In the Rule Attributes tab, choose a user column name from the list of values, choose the type of values from the drop-down list, and enter the value or values that apply.
5. Optionally, enter additional attributes for the rule.

   Every attribute is assumed to be linked to other attributes with *AND*.
6. If you want any of the attributes to be related with OR, use the Build Expression tab to relate the first two attributes with AND or OR.

   An additional value of **Result1** appears in the first column and is added to the attribute list of values.
7. Continue to relate the remaining attributes. Use **Result1** to relate a third attribute to the first two.
8. Save the rule.

   The expression appears.
9. To add rules in the hierarchy of rules, position your cursor over the parent rule, right click, and choose **New Rule**. Repeat from step 2.
10. Return to the Ruleset Form for every ruleset that has new or changed rules and click **Synchronize.**

Guidelines

Name your rules after the revenue classes they describe. Rules do not require unique names.

Build Expressions

Use this window to create a relationship between multiple rule attributes. For example, you can define the following rules and assign them to this expression:

ITEM_ID = ABC

ITEM_ID = 124

Oracle Sales Compensation treats the rules attributes as having an "AND" relationship. The Build Expression function allows users to change and refine these relationships. For example, users can redefine the rule as being:

ITEM_ID = ABC or ITEM_ID = 124

Prerequisites:

Multiple rule attributes have been assigned.

Steps

1. Select the Build Expression tab.
2. Select a rule attribute from Operand 1.
3. Select And or Or condition from the operator.
4. Select a rule attribute from Operand 2.
5. Repeat steps 2-4 until the desired expression has been created.
6. Press Finish and save the rule.

Defining a Hierarchy

Steps

1. In the hierarchy, double-click **Revenue Classes.**

   The Hierarchies window displays the revenue class hierarchy type.
2. In the Name field, select the dimension for which you are defining a hierarchy.
3. Choose Hierarchies. Use the Hierarchies window that opens to add and view hierarchies.
4. Enter the name of the new hierarchy.
5. Enter the period you want the hierarchy to be effective. Choose From and To periods from a list of values. Two hierarchies in the same dimension cannot have overlapping periods.
6. Add nodes to a hierarchy. Save your work.

Adding Nodes to a Hierarchy

Steps

1. In the hierarchy, double-click **Revenue Classes.**

   The Hierarchies window displays the revenue class hierarchy type.

2. Select a hierarchy, then choose Nodes.

   Use the window that opens to define the parent-child relationship between all nodes in a hierarchy.

3. Start at the top of the hierarchy; define the nodes in your hierarchy.

   By default, Oracle Sales Compensation names the highest level root of every hierarchy BASE NODE. You can change this name. Use the Current Root menu to change the root your are defining.

4. Enter the names of all children of this node. Use the list of values to select the children.

5. To define the next level in the hierarchy, select a child node, then choose Children.

   The child moves to the Current Node position and Oracle Sales Compensation displays the children of the new parent, if they exist.

6. Enter the names of all children of this parent.

7. Choose Parent to go one level up in the hierarchy.

8. Repeat steps 4 through 7 to define all nodes in the hierarchy.

9. Save your work and exit the window.

Deleting Nodes from a Hierarchy

Steps

1. In the Hierarchies window, choose Nodes.

2. Select the node you want to delete and then choose Delete Record from the Edit menu.

3. Save your work and exit the window.

Setting Up Compensation Plans

Defining Calculation

There are 100 user definable column attributes. You can use these Calculation Expressions as Performance Measures, Input Expressions, Output Expressions, or

Rate Table Dimensions. You can also nest a Calculation Expression within another Calculation Expression.

As part of the definition process you can select columns from a list of table columns on the form called Forming Calculation Expressions to create expressions. Once they have been saved they can be assigned and reassigned to any number of formulas you need.

Do this by selecting a valid Expression from a List of Values at each of the windows for performance measure, input and output.

A Performance Measure can be an accumulation of transaction values that are captured by the Plan Element that it is assigned to. Performance Measures serve as a mechanism to gather cumulative information by Plan Element and group them for use in reports that compare achievements to Quota, Goal and Performance Measure.

An example of a Performance Measure is Revenue. You would select and define the columns where revenue information for transactions are held. As transactions are entered and collected for the assigned Plan Element, the transaction values are accumulated. An example Performance Measure looks like this:

TRANSACTION_AMOUNT

Input Formulas instruct Sales Compensation what to evaluate from the transactions and how to match the results to the corresponding rate table. Think of the input expression as a sorter for all incoming transactions for Sales Compensation. An example Input Formula expression looks like this:

(TRANSACTION_AMOUNT*EVENT_FACTOR)/TARGET

For example, as a condition a company can establish that its sales force will be compensated based on transaction amount. The input expression will merely state that transactions will be sorted by TRANSACTION_AMOUNT from the CN_COMMISSION_HEADERS column.

This is an example of a rate table:

$0 - $100	4%
$100 - $500	5%
$500 - $99,999	6%

As transactions are 'sorted' by through the input expression they are matched to the rate table tiers established. If a transaction is collected in Oracle Sales Compensation with the following attributes:

1. Customer X
2. Transaction Amount $100
3. Product Z

Oracle Sales Compensation, using the input expression created will match the above transaction of $100 with the rate table and determine that 4% will be paid on this order.

Outputs of the formula instruct Sales Compensation how much to pay salespeople. The payment amount can either be tied to a rate table or not. This will be determined by the users.

In this example above, business users determined that the salespeople will be paid based on the rate table result, transaction amount, and a constant uplift / accelerator factor of 1.035. Users will need to instruct Sales Compensation the columns where all this information resides and apply the calculations.

Example of an output expression:

Rate Table Result * (TRANSACTION_AMOUNT * PAYMENT_FACTOR)

Using the above output expression, multiply 4% with the transaction amount ($100), event factor of 100% and 1.035 for the payment accelerator or payment uplift. The 4% is multiplied by the result of the sum in the brackets. If the payment factor is 1.05, then the result or commission is $4.20 ($100 x 4% x 1.05 = $4.20).

Forming Calculation Expressions

Use this window to define calculation expressions or parts of your formula that can be reused in other formulas.

Prerequisites

Table and column mapping is complete.

Steps

1. From the Navigator choose Compensation Plans, View By Calculation Expressions.

2. In the hierarchy, right-click Calculation Expression and choose New. The Calculation Expression window will appear.
3. Enter a unique name for the expression.
4. Optionally, provide a description for the expression.
5. From the Calculation Values box, select the column to be used in the expression.
6. Once a selection has been made, press the arrow key to move the column into the Expression box. The column should appear in the Expression as soon as the arrow has been pressed. To remove an item press the lower arrow button to remove an entry from the Expression box.
7. Select an operand from the Operation box. Once an operand has been pressed it will appear in the Expression box. Again, to remove an item from the Expression box, press the lower arrow button.
8. Optionally, numeric constants can be added to an expression. Enter the numeric value desired in the number field and press the upper arrow button to move it to the Expression box. To remove a item press the lower arrow button to remove an entry from the Expression box.
9. Repeat step 5 through 8 until the desired expression has been created.
10. Optionally, to view the SQL statement generated for the expression check the 'Show SQL' box in the lower right hand corner of the window.
11. Optionally, press the Clear button to restart the create expression process without saving the work.
12. Once all elements and operands have been assembled for the expression, save the expression.
13. Press the 'Compile' button to ensure there are no logic errors or rule violations in the expression.
14. The status of the expression should read Valid after it has been compiled.
15. The usage of the expression will also be displayed once it is saved. The usage rules will determine where the expression may be applied.

Guidelines

A Commission Expression must include at least one column from the following tables:

- cn_commission_lines

- cn_commission_headers

A Bonus Expression cannot include a column from the following tables or any external table that is mapped to these tables:

- cn_commission_lines
- cn_commission_headers
- cn_srp_period_quotas

A Commission Expression cannot include an element from the table cn_srp_periods or any table that is mapped to this table.

A Bonus Expression cannot include an element from the table cn_srp_period_ quotas or any table that is mapped to this table.

User table names are listed under External Elements in the Calculation Values tree. You join an external table to an internal table by mapping them using System > External Tables.

A Bonus Expression cannot be used as an embedded formula and cannot be mixed with a commission type formula.

Selected columns are accessible in the calculation values tree for use in building formulas and performance measures. The user column name is listed in the tree rather than the actual column name.

The following Oracle Sales Compensation tables are predefined in the system and can be used as calculation values in defining performance measures and formulas:

CN_COMMISSION_HEADERS
CN_COMMISSION_LINES
CN_SRP_QUOTA_ASSIGNS
CN_SRP_PERIOD_QUOTAS
CN_SRP_PERIODS
CN_QUOTAS

A Rate Dimension expression can only be used from the following list of columns:

1. CN_SRP_PERIOD_QUOTAS
2. CN_SRP_PAN_ASSIGN
3. CN_SRP_QUOTA_ASSIGN
4. CN_SALESREP

Defining Rate Tables

Rate tables are used to establish compensation percentage rates or fixed amounts for different performance levels. The compensation formula and plan element determine the type of information to be compared to the rate table as well as how the resulting rate is used in the calculation. Use this procedure to define your rate tables.

Prerequisites

Rate Dimensions must exist.

Steps

1. In the Navigator, choose **Compensation Plans >** View By **Rate Tables.**
2. In the hierarchy, right-click **Rate Tables** and choose **New.**

   The Rate Tables window appears.
3. Enter a unique name for the Rate Table. Select a Rate Table type, either an Amount type or a Percentage type.
4. In the next block select a rate Dimension that you created previously.
5. Click in Commission Rate box and enter rates.
6. Save your Rate Table if this is not a multidimentional rate table.

For multidimensional rate tables use the following steps:

1. In the navigator, choose Compensation Plans and then View By Rate Tables from the drop down menu.
2. Right click New.
3. Enter a unique name for the Rate Table. Select a Rate Table type, either an Amount type or a Percentage type.
4. In the next block select a rate Dimension that you created previously.
5. Repeat step 4 to apply each additional dimension to be added to this rate table.
6. Click check box and select the dimension you want to use as the Base Dimension. Base Dimension is the constant view of the rate table shown in the Commission Rates box.
7. Navigation in the Current Tier box determines the choices users have in the Selected Dimension Tier box. Select, in turn, each element located in the Current Tier box except the base dimension.

8. In the Selection Dimension Tier box, select the string value that corresponds to the base dimension in the Commission Rates box.
9. Then, enter the commission rate to be paid if the dimension combinations are met.
10. Repeat steps 7-9 until all dimension combinations are complete.
11. Save the Rate Table.

Rate Dimensions

Rate dimensions define the tiers that a rate table uses to apply rates.

If a commission rate is based on multiple criteria, then a multidimensional rate table must be created to reflect all criteria: one dimension per criterion.

Note: This version of Sales Compensation does not support accumulated revenue with multidimensional rate tables.

In the following example, three dimensions are used to calculate various commission rates: License Revenue (percent of quota), State, and Product. The formula first compares transaction revenue with the first dimension, License Revenue. Next, the formula compares transaction location with the second dimension, State. Finally, the formula compares product identification with the third dimension, Product.

A dimension contains rate tiers to establish different levels of achievement to be compensated at different rates. In this example, two dimensions have two tiers and one has three, but any number can be defined.

The License Revenue dimension:

0-100

100-9,999

The State dimension:

Arizona

California

Oregon

The Product dimension:

PCs

Peripherals

Together, there are 12 possible combinations, and each one can be assigned a different commission rate.

Your minimum and maximum values in the Rate Tiers section must be stated in terms consistent with your input information.

You can change both the tiers and rates for a rate table. Any changes you make are propagated to all plan elements to which those rate tables are assigned, and thus to any salespeople that use plans containing those plan elements. If you change the levels of quota achievement in a tier, or add or delete a tier in a rate table, those changes propagate to all salespeople, regardless of whether their plans have custom quotas or rates.

The following table shows four columns of a Dimension and Rates Example. Columns are License Revenue, State, Product, and Rate. Product is chosen as the base dimension. There are 6 possibilities for each of the two tiers in the License Revenue dimension, including all combinations with the other two dimensions.

Dimension and Rates Example

License Revenue	State	Product	Rate
0-100	Arizona	PCs	1%
0-100	Arizona	Peripherals	5%
0-100	California	PCs	1.5%
0-100	California	Peripherals	4.5%
0-100	Oregon	PCs	1.25%
0-100	Oregon	Peripherals	6.25%
100-9,999	Arizona	PCs	4%
100-9,999	Arizona	Peripherals	8%
100-9,999	California	PCs	4.5%
100-9,999	California	Peripherals	7.5%
100-9,999	Oregon	PCs	4.25%
100-9,999	Oregon	Peripherals	9.25%

Prerequisites

For an expression type dimension, the expressions must already be defined.

Steps

1. In the Toolbar, select Tasks > Rate Dimensions.
2. Enter the name of the rate dimension.
3. Select the dimension type:
   - Amount
   - Percentage
   - String
   - Expression
4. Enter the tier values. The tier sequence will be numbered automatically as you progress through each level of achievement.
5. Save the dimension.

Guidelines

If the application is unable find a match in a string dimension rate table, the application will pick the last rate value by default. For example, suppose that in the example above, a transaction has dimension values of 10,000, Iowa, and Service. No matches will occur, and the rate table result will be 9.25%, the last value in the Rate column.

If you do want non-matching transactions to receive commission, add "OTHER" as the last string value to each string dimension with a corresponding commission rate of 0, for example.

Another method of dealing with non-matching transactions is to use classification rules. Transactions with attributes that do not match your classification rules will have a failed classification status. If required, you can correct these failed transactions' attributes by changing their values and maintain a record of the adjustment through the manual adjustments window.

Creating Formulas

You have complete flexibility to create formulas for calculating compensation. Your formulas can be used in another formula definition or in a plan element definition. Use this procedure to create formulas.

You can save an incomplete formula and return to complete it later.

Prerequisites

If you wish to incorporate Calculation Expressions into your formula, then these Expressions must be created before you reach this stage. These Expressions can be repeated in your formula and can also be reused in other formulas as well. Please see the Guidelines section of Forming Calculation Expressions for more information on the types of calculation expressions that you can use for Commission and Bonus Formulas.

Any column from any table can be part of your formula, providing the Calculation Value check box for the column is selected in Columns and Tables. (See Defining Calculation.)

Rate tables must be created first if you want to include them in your formula. (See Defining Rate Tables.)

Steps

1. In the **Navigator**, choose **Compensation Plans** > View by **Formulas**.
2. In the hierarchy, right-click **Formulas** and choose New.
3. In the general tab, enter a unique name and a description for your Formula.
4. Decide whether your Formula is for calculating a Commission or a Bonus. Make your selection at Type.
5. In the next block, determine your calculation rules.
6. In the last block, select a **Calculation Expression** that will become your Performance Measure. Performance Measure as well as Quota will be used in Reports for comparison with achievement.
7. In the Input tab, select a **Calculation Expression** to represent your input formula. The number of Input Calculation Expressions must equal the number of Dimensions in the Rate Table that you will select in the next step. And, they Input Calculation Expressions must be listed in the order they were assigned in the Rate Table.
8. If applied rates are part of your formula, then in the **Rate Table** tab, select the rate tables to apply to the formula and enter their effective start and end dates. You can view the Rate Table details and rates for each dimension by clicking on the Rate Table Details button.
9. Optionally, forecast version Expressions may be assigned. This enables the formula to be used by the Income Planner of Sales On Line. Please see Sales On Line for details.

10. Select Rate Table tab and assign Start and End dates.
11. In the **Output** tab, select your output Calculation Expression.
12. Return to the General tab and click Generate. On completion, the validation process will return a Complete status.

Guidelines

A Bonus Formula is a type of Formula where there are no links or references to transactions. See the Guidelines section of Forming Calculation Expressions for more information.

Apply transactions individually if you want each transaction calculated separately to determine a rate. Group transactions if you want transactions aggregated to determine the rate.

Select the Accumulative check box if transactions are required to be aggregated in total. Rate applied will be determined by the transactions-total achieved to date within the interval.

Dependency Notes

Formula Commission

1. Individual Option for Transactions can be used with any Accumulate / Interval to Date / Threshold option.
    a. By default Interval to Date and Accumulate options must be used together. Users cannot select Interval to Date by itself. Split options are selectable (each is mutually exclusive).
    b. By default Threshold and Accumulate options must be used together. Users cannot select Threshold by itself. Split options are not available for Threshold calculations.
    c. Accumulate can be selected by itself. Split options are selectable (each is mutually exclusive).
2. Group by Interval for Transactions can only be used with Accumulate. Split options are selectable (each is mutually exclusive).

Formula Bonus

Bonus formulas calculate only against Individual transaction options. Split options are selectable (each is mutually exclusive).

Use interval to date quotas and fixed amounts if:

- Quotas are set each period
- Quotas are set cumulatively within the interval
- Performance to date is to be compared to the quota to date

Choose Thresholds if you want all prior transactions within the interval paid retroactively at the higher rate once that higher rate is achieved through accumulative transactions.

Do not split tiers if you want a rate from the Rate Table applied to the full amount. Split tiers if you want portions of the full amount paid at each rate up to the top qualifying rate. For example, the Rate Table shows 0-1000 at 1%, 1000-2000 at 2%. The transaction amount is 1500. If you check the No Split check box, 2% will be applied to the whole transaction amount of 1500. If you check the Non Proportional check box, 1% will be applied to 1000 and 2% will be applied to 500.

The Proportional check box is intended for use with Amount Rate Tables. Example, if the Rate Table shows 0-1000 at 100, 1000-2000 at 200. The first transaction amount is 200. The commission for this transaction is 20 because 200 is one fifth of the first rate tier and one fifth of the 100 rate is 20. If the second transaction amount is 1300, the remaining four fifths of the first rate tier will pay 80 and half of the second tier [(1300-800) / (2000-1000)] will pay 100 (half of the rate 200). Total commission for the second transaction is 180.

Defining Plan Elements

A **plan element** is a set of conditions a salesperson must meet to be eligible for compensation. It determines how the compensation is calculated. Use this procedure to define plan elements.

Prerequisites

If the plan element includes a formula, then the formula must be created first. (See Creating Formulas.)

If the plan element includes a rate table, then the rate table must be created first. (See Defining Rate Tables.)

If the plan element includes a revenue class, then the revenue class must be defined first. (See Creating Revenue Classes and Hierarchies.)

Steps

1. In the Navigator, choose **Compensation Plans > View By Plan Elements.**

2. Right-click on Plan Elements and select new.
3. In the General tab, in the first block:

- Enter a unique name for your Plan Element.
- Enter its Start and End dates.
- Enter a description of its objective.
- You may copy from an existing Plan Element by clicking on the Copy Plan Element button to make a duplicate of the displayed Plan Element. The name is changed with a "_2" attached to the end of the Plan Element name.
- Optionally, to start a new Plan Element, click on the New Plan Element button.
- In the Quota Group field, select either Quota or Bonus. If you select Quota, this Plan Element will appear in the top half of the YTD Summary Report. If you select Bonus, then this Plan Element will appear in the lower half of the YTD Summary Report.

4. In the second block of the General tab:

- Select the Interval, Incentive type, Credit type, Formula type and a Formula. If you choose External Formula type, you must enter the name of the PL/SQL procedure. If you choose Formula type, select a Formula that has a Complete status.
- If you want the Plan Element and the eventual payment to be assigned to someone other than the Salesperson credited with the sale, check the Eligible for Payee Assignment check box.
- Tick the Calculate Last check box if you want this Plan Element to be calculated after all the other Plan Elements assigned to the same Compensation Plan as this Plan Element is, are calculated.
- Optionally, select Liability and Expense Account codes information that you want sent to Oracle Accounts Payable Invoice Interface Table for all future commission payments relating to this Plan Element.

5. In the last block of the General tab, enter the Quota, Fixed Amount, and Goal figures. These are measures that will be used to compare against actual achievements. If you have Quota, Fixed Amount and Goal figures against individual Revenue Classes assigned to this Plan Element, you can check the Sum amounts from Revenue Classes check box and the totals will appear in these 3 fields. The Distribute Variables button will be available once a Formula with Interval to Date checked is assigned to your Plan Element. The Distribute function allows you to seasonalize your Quota, Fixed Amount and Goals.

6. In the Revenue Classes tab, assign your Revenue Classes to this Plan Element. You may have Quota and Payment Accelerators at Revenue Class level for an effective period that you can specify through the Start and End Dates. Ensure that your Transaction or Event factors add up to 100% in total. Example, you can have 50% of the Order value calculated for commission, 20% of the Invoice value and 30% of the Payment amount for commission calculation. Other Factors do not need to total 100% and each can be over 100% if you require.
7. The Formula tab will display the Formula that you have assigned under the General tab earlier.
8. Similarly, the Rate Table tab will display the rates associated with the Formula.
9. Save your new Plan Element so that it will be available for assigning to a Compensation Plan.

Guidelines

You can assign multiple plan elements to a compensation plan, and you can assign the same plan element to multiple compensation plans.

When you change the structure of a plan element, it applies to every compensation plan that uses it and for every salesperson assigned to that plan. The affected compensation plans must again be validated.

The Plan Element's effective dates must be within the dates of the compensation plans to which the plan element is assigned.

You can change any part of a plan element before it is assigned to a salesperson. Any changes you make are propagated to all plans to which those plan elements are assigned, and thus to any salespeople that use those plans.

Once a compensation plan has been assigned to a sales role, you cannot change the plan's interval type. If you have assigned the plan and you want to change the interval for a plan element, you must remove the plan assignment, change the plan element's interval, then reassign the compensation plan.

How the Accelerators and transaction factors are used will depend on how your Calculation Expression is defined. Example, a common Input Expression that complements a percentage rate table is as follows:

EVENT_FACTOR* QUOTA_FACTOR*TRANSACTION_AMOUNT/TARGET.

An Output Expression is as follows:

Rate_ Result* TRANSACTION_AMOUNT* EVENT_FACTOR* PAYMENT_ FACTOR.

Note: For Plan Elements with Incentive type of Manual and Formula type of None, rate tables are assigned through the Rate Table tab on the Plan Element form. You can change the rate table assigned to a Plan Element at any time, regardless of the Rate Table assigned to the Formula.

Defining Compensation Plans

A compensation plan is built from plan elements and is assigned an effective start and end date. The plan can then be assigned to multiple sales roles.

Use this procedure to define a compensation plan.

Prerequisites

Plan elements and formulas must be created if they are to become part of the compensation plan.

Steps

1. In the Navigator, choose **Compensation Plans > View By Plan Elements.**
2. In the hierarchy, right-click **Compensation Plans** and choose **New.**

   The Compensation Plans window appears.
3. Assign a unique name to the new compensation plan.
4. Assign start and end dates to the plan.
5. Enter the objective description for this plan based on the associated sales role. The description is used as part of a contract for the salesperson.
6. Check the Allow Revenue Class overlap check box if you want your Plan Elements to use the same Revenue Classes.
7. Select plan elements to be included in the plan and assign each plan element effective start and end dates.
8. Optionally, select a plan element and click **Element Details** to review plan element details.

   The Plan Element window displays the selected plan element information.
9. Click **Validate** to ensure that you have entered the plan information correctly.

   When you validate a compensation plan, the following are verified:

   - The plan has a name and start and end dates

- The plan has one or more plan elements assigned with start and end dates within the plan start and end dates
- Each plan element has a rate table with contiguous tiers and with start and end dates within the plan start and end dates
- Each plan element has at least one revenue class assigned that has start and end dates within the plan start and end dates
- Each plan element has a rate table structure that makes sense for the plan element type
- Each revenue class has at least one key transaction factor and at least one other transaction factor

If each of the above conditions is true, then the Status field shows **Complete**. When the Status field displays **Incomplete**, the plan cannot be used to calculate compensation.

10. Save the plan.

    When you save a plan, the values of that plan become the default values when you assign it.

11. Optionally, edit the start and end dates for individual salespeople. When the compensation plan is assigned to a sales role, the sales role and salespeople assigned to the sales role display in the compensation plan window.

Guidelines

Consider defining plan names by job titles or area of sales you are compensating.

When you assign a plan to a salesperson, you define assignment start and end effective dates between which the salesperson is on that plan. Because you can assign the same plan to many salespeople, ensure the plan period is broad enough to encompass all necessary assignment periods.

You can change or restructure any aspect of a compensation plan. Because you can assign the same plan to many salespeople, however, ensure you are aware of how the changes you are making impacts individual salespeople.

When you change a compensation plan, the changes propagate to the salespeople assigned to the plans. For customized plans, the salesperson receives all changes except the customized changes. If a change is made to a tier in a rate dimension, then the new rates overwrite customized rates.

Customizing Compensation Plans

You can customize each plan element in the compensation plan for an individual salesperson. Use this procedure to customize a compensation plan.

Prerequisites

None

Steps

1. Choose **Salesperson** from the **Navigator**. The Salespeople Workbench appears.
2. In the Compensation Plans tab, select a sales role.

   The compensation plans and plan elements for the salesperson and sales role appear.
3. Select **Customized** next to the plan element to be customized.

   If you leave the **Customized** check box unchecked for a plan element, then any changes you make to the quota or rates for that plan element are inherited by the salesperson.
4. Select the plan element name and click **Details.**

   The Plan Element window displays the details for the plan element.
5. Edit the details to customize the plan. See the table under References for a list of fields that can be changed and where they can be found in the plan element tabs.
6. Save your changes.

Guidelines

Although you can customize the rates for individual salespeople, those representatives automatically inherit all changes made to other aspects of the compensation plan itself. For example, if you customize compensation rates for a salesperson and then delete a bracket in the rate table assigned to that compensation plan, then the salesperson's rates default to those in the new rate table.

If you change the levels of quota achievement in a tier, or add or delete a tier in a rate table, then those changes propagate to all salespeople, regardless of whether their plans have custom quotas or rates.

Setting Up Payment

Pay Groups allow control over the frequency of payment for the members of the group. Payment Plans allow control over the payment amounts at a Salesperson level for all Salespeople who have the specific Payment Plan assigned to them. The Transaction Details window will allow controlled recovery or a payment hold at transaction level. In addition the Transaction Details window will also allow you to decide which transactions get paid as part of each Payrun.

This version of Sales Compensation introduces Oracle Payable integration. The integration allows you to pay your Suppliers, Agents or Brokers (also referred to as Salespeople and Resources in this Guide) through Oracle Accounts Payable payment processes.

Oracle Payable will only recognize the Salespeople for payment if they are activated as Suppliers through Oracle Purchasing. Please refer to Oracle Purchasing Guides for the activation procedure.

Defining Pay Groups

A **pay group** defines the frequency of payments, such as monthly or semi-monthly, for the salespeople who are assigned the pay group. Use this procedure to define pay groups.

Prerequisites

Calendars and related pay periods must be defined in GL and activated in Sales Compensation.

Steps

1. In the Navigator, choose **Payment Setup > View By Pay Groups.**
2. In the hierarchy, right-click **Pay Groups** and choose **New.**

   The Pay Groups window appears.
3. Assign a unique name to the pay group and enter a description.
4. Select effective start and end dates for the pay group.
5. Select a calendar from the list of values.
6. Select a period type from the list of period types that were defined for the selected calendar.

The grid displays all pay periods for the selected calendar and period type that fall within the effective date range.

The Sales Representatives tab displays all salespeople who have been assigned the pay group using the Salesperson Workbench.

7. Save the pay group.

Guidelines

The period type defines the frequency of payments for the pay group.

Each pay group can have one or many pay periods. A **pay period** is a range of dates over which calculated plan element commissions are collected for payment.

The pay group reflects the frequency of the pay periods.

Each pay group requires a separate pay run. See Payruns for information about creating a pay run.

Defining Payment Plans

Use payment plans to set rules governing how much is paid. Payment plans are optional and are used to set up advance or deferred payments. Use this procedure to define minimum and maximum payments and controlled recovery.

Prerequisites

Credit types must be defined.

Steps

1. In the Navigator, choose **Payment Setup > View By Payment Plans.**
2. In the hierarchy, right-click **Payment Plans** and choose **New.**

   The Payment Plan window appears.
3. Assign a unique name to the payment plan.
4. Optionally, establish a minimum amount to be paid at the end of each pay interval, and whether or not it is recoverable from later commissions.
5. Optionally, establish a maximum amount to be paid at the end of each pay interval.
6. If you want any commission earned above the maximum payment to be included in a later pay run, then select **Pay Later.**

7. Save the payment plan.

   The payment plan is available to be assigned to a salesperson in the workbench.

Guidelines

The application checks first for the minimum amount and pays it. Recoverable amounts are calculated after the minimum is met.

Oracle Payable Integration

In the new version of Oracle Sales Compensation, information can be transferred and posted from Oracle Sales Compensation to Oracle Payable. Expense and Liability Accounts can be assigned at three levels: plan element, revenue class, and classification. There is an interface table in Oracle Sales Compensation. After the data is mapped to the interface, the subledger is updated to reflect the amounts paid. The Liability Account will also be mapped to the Oracle Payable interface using the account generator in Oracle Sales Compensation.

Enabling a Salesperson in Oracle Payable

Prerequisites

Switch to the Payables responsibility. From the Toolbar, select File and press Switch Responsibility. Select Payables from the list.

Steps

1. On Functions tab, expand Suppliers.
2. Double-click on Entry to open the Suppliers form.
3. Enter salesperson's name as a supplier. Save.
4. Click Sites button at the bottom of General tab.
5. Enter site name.
6. Click Contacts tab to create Contact.
7. Enter contact name and information. Save.

Assign Sales Role and Group

Prerequisites

Switch to the Sales Compensation Super User responsibility. From the Toolbar, select File and press Switch Responsibility. Select Sales Compensation Super User from the list.

Steps

NOTE: All items that have a reference of creating or assigning an item should be noted as a prerequisite prior to adding a Supplier to Oracle Payable.

1. In the Toolbar, press Tasks > Import Resources
2. In Resource Category field, select Supplier Contact from the list of values.
3. Enter Name and Contact or select from the list of values.
4. Click Search. This populates the Search Results field.
5. Click Create Resource.
6. Verify Start Date, then click OK.
7. Click Save Resource, then click Details.
8. Create Sales Role and Compensation Group.
9. In Resource form, assign valid Salesperson number.
10. Click Roles tab. Assign Role Type from list of values as Sales Compensation.
11. Assign Role from list of values. Save.
12. Click Group tab and assign Group from list of values.
13. Click Save. Resources tab is displayed. Select desired sales credit type from list of values [Quota Sales Credit is used in Vision instance]. Save.

Assign Pay Group and Compensation Plan to a Salesperson

Steps

1. Click Sales People tab in the Navigator.
2. Select View by Compensation Groups from drop-down menu at top of Navigator.

3. Expand or double-click the Compensation Group node in the tree next to the Salespeople tab to display a listing of the Compensation Groups.
4. Expand the tree node or double-click on desired Compensation Group to display Salesperson listing.
5. Double-click Salesperson's name to open Salesperson Workbench.
6. On Salesperson Tab, select Pay Group from list of values.
7. Assign Compensation plan to Role.
8. Press Load transactions.
9. In the Toolbar, press Tasks > Submit Calculation.
10. Post details by using Concurrent request in Concurrent Manager.

Payruns

Prerequisites

Change responsibility to Sales Compensation Online Super User. (This is the JSP part of Oracle Sales Compensation)

Steps

Create a payrun for the salesperson.

1. Enter the pay period and pay group, or choose from list of values.
2. Select incentive type of Commission.
3. Go to Payrun Summary.
4. Assign payment date.
5. Assign salespeople to pay to the payrun.

Withhold Commission on a Specific Sales Deal

You can change or adjust commission on a specific sales transaction in two ways. This is the first way:

1. In Payrun Summary, press Total. It takes you to Payrun Details
2. Select total amount. This brings you to Payment Transactions.
3. Check check box to hold payment for a particular transaction.

4. Adjust the total amount manually in the right-hand column, labeled Payment Amount.

The second method to hold payment is to add the Hold Payment attribute to the salesperson. This will prevent any transactions the salesperson processes from being paid until the hold is lifted.

You can view all transactions of a salesperson.

Steps

1. From Sales Compensation, select Task > Define Resources
2. Query the Salesperson and press 'Resource Details'
3. Select the Compensation Tab. Check the Hold Payment check box and enter a Hold Reason code.

Account Generator

Expense and Liability Account information is supported by default at three levels:

- REVENUE CLASS
- PLAN ELEMENT
- CLASSIFICATION

If the transaction level option is chosen then the following setup has to be done similar to the current classification Ruleset procedure:

Steps

1. Define the name of the ruleset.
2. Give a start and end date of this ruleset.
3. Select the type of Account Generator.
4. In the Navigator, right-click the Ruleset that you have just created and select Add new Child Rule**.**
5. The Rules window appears.
6. Assign a name to the rule that you are about to define.
7. Choose a revenue class from the list of values. Optionally select Expense & Liability account.
8. Enter the Expense and Liability Accounts from the list of values.

9. In the Rule Attributes tab, choose a user column name from the list of values, choose the type of values from the drop-down list, and enter the value or values that apply.
10. Optionally, enter additional attributes for the rule.
11. Every attribute is assumed to be linked to other attributes with *AND*.
12. If you want any of the attributes to be related with OR, use the Build Expression tab to relate the first two attributes with AND or OR.
13. An additional value of Result1 appears in the first column and is added to the attribute list of values.
14. Continue to relate the remaining attributes. Use Result1 to relate a third attribute to the first two.
15. Save the rule.
16. The expression appears.
17. To add rules in the hierarchy of rules, position your cursor over the parent rule, right click, and choose New Rule. Repeat from step 2.
18. Return to the Ruleset Form for every ruleset that has new or changed rules and click Synchronize**.**

Guidelines

The application checks to see what account generator level has been set. Based on this level, the appropriate Accounts Payable accounts will be associated to the line item.

Levels

Revenue Class: Each revenue class will be assigned a specific liability and expense account. This option should be used if tracking expenses for each product is required.

Plan Element: Each plan element can be assigned a specific liability and expense account. This option should be used if all products assigned to the plan element will be assigned to the same expense and liability account.

Classification: An entire rule can be assigned a specific liability and expense account.

Payroll Integration

In this release, Oracle Sales Compensation is integrated with Oracle Payroll. Now, users can pay their resources through Oracle Payroll without modifying their existing environments. A user-defined mapping feature enables users to define what data they need to send from Sales Compensation to Payroll. This is accomplished by mapping plan elements in Sales Compensation to pay elements in Oracle Payroll.

A payroll in Oracle Payroll defines a group of employees who share the same frequency of processing and payment, defined by the payroll calendar in PER_ TIME_PERIODS.

You must define pay elements and input values in Payroll first. Then, before sending information to Payroll, perform the following steps in Sales Compensation:

1. Map Sales Compensation Plan Elements to the Pay Elements in Payroll
2. Map information from Sales Compensation to be passed as input values for the pay elements in Payroll

Pay Elements Mapping

Prerequisite

Using the System Parameters window, enable integration with Payroll.

Steps

1. Click Payment tab, Setups subtab.

   The Pay Elements Mapping window appears.

2. Select a Plan Element from the list of values in the Plan Element column. Use the search fields at the top of the window if needed.
3. In the Pay Element (Payroll) field, select the Pay Element to which you want to map the Plan Element. Use the search field above if needed.
4. Enter a Start Date and End Date in the fields to the right.
5. Select the Remove icon or the Inactive Employees check box if desired.
6. Click Update.
7. If desired, click Restore before clicking Update to return the window to the previously saved version.

Guidelines

The mapping information is stored in the CN_QUOTA_PAY_ELEMENT_MAP table. The three-column table below shows examples of how the mapping is set up between Sales Compensation plan elements and Payroll pay elements, with the salesperson status indicated in the third column:

Plan Element (OSC)	Pay Element (Payroll)	Salesperson Status
01 Account Quota	Commission Pay	ACTIVE
01 Account Quota	Commission Pay	INACTIVE
Recoverable Payment Plan	Commission Pay	ACTIVE
Payment Plan Recovery	Commission Pay	ACTIVE
Q1 OCG Bonus	Bonus Pay	ACTIVE
Q1 OCG Bonus	Bonus Pay	INACTIVE
Education	Commission Pay	ACTIVE
Education	Commission Pay	INACTIVE

Pay Element Input Values Mapping

If a pay element in Payroll has been defined to have input values, then you can define a mapping in Sales Compensation that identifies which data columns in Sales Compensation tables map to the input value of a pay element. The following tables can be used to map Sales Compensation to Pay Element Input Values:

CN_COMMISSION_HEADERS

CN_COMMISSION_LINES

CN_PAYRUNS

CN_POSTING_DETAILS

CN_SALESREPS

This mapping is stored in the CN_PAY_ELEM_INPUTS table in Sales Compensation.

Steps

1. Click the Payment tab, subtab, and select Element Input Values from the Setup Steps cue card.

2. Select a pay element from the list of values in the Pay Element field.
3. Enter a Start Date and End Date.
4. In the table, select Sales Compensation Table and Column values to map them to the values displayed in the Input Values (Payroll) column.
5. Click Update.

Reports

The following reports are available in this release:

Planning Reports

Quota Model Summary

Average Quota Summary

Overassign Quota Summary

Quota Range Summary

Overlay Summary

To-Be-Hired Summary

Transitional Salespeople

Compensation Plan Generation Status

Sales Role and Compensation Plan Mapping

Production Reports

Year To Date Summary

Quota Performance

Commission Statement

Commission Summary

Transaction Details

Compensation Group Hierarchy

Unprocessed Transactions

Quota Model Summary

With this report, you can get a snapshot of:

- A compensation group's total quota and its constituents
- A compensation group's quota approval status by salesperson
- The overassignment effect reverberating through lower levels of the organization hierarchy

You can see in one report the quota allocations to every resource or salesperson, including the manager of a selected compensation group. The quota is broken down by individual components that make up the total quota. Additionally, the user can see the over assignment expressed in values as well as percentages between each level of the organization hierarchy. These are represented by subtotals at the bottom of the report for each level of salespeople; for example, the total quota for salespeople at the bottom of the hierarchy (street level), the total quota for the immediate manager (first line manager) and the total quota for the manager of the first line manager.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups. User is required to select one Compensation Group.

Data

The first table of information

Column Title	Description
Salesperson Name	Lists salespeople in the Compensation Group selected
Employee Number	Displays associated employee numbers
Role	Displays associated roles
Role Start Date	Displays the start date of each salesperson's assigned role
Role End Date	Displays the end date of each salesperson's assigned role
Component 1 Name	Displays the assigned quota against this user-defined Component
Component 2 Name	Displays the assigned quota against this user-defined Component
Component 3 Name	Displays the assigned quota against this user-defined Component
Total Quota	Displays the total assigned quota for all Components for each role
Assigned Quota	Displays the rounded figure of the total quota
Plan Status	Displays the approval status of the Compensation Plan
Overlay	Yes or No flag (see Concepts and Procedures for explanation of overlay)

The second and last table of information:

Row Title	Description
Total quota for second line manager	Displays column totals for all salespeople with Plan Level value of 2 (see Sales Role Details screen and Plan Level field)
Total quota for first line manager	Displays column totals for all salespeople with Plan Level value of 1
Total quota for street	Displays column totals for all salespeople at the bottom of the hierarchy for this Compensation Group and with Plan Level value of 0 or null
Over assign from second line manager to first line manager	Displays the second line manager's quota as a percentage of the first line manager's quota

Row Title	Description
Over assign from first line manager to street	Displays the first line manager's quota as a percentage of the street salespeople quota

Average Quota Summary

With this report, you will know what the average quota value is by role for the selected compensation group. It is useful to know the average quota value for comparable roles in various compensation groups and organizations. In some companies, compensation groups are organized by sales territory. Therefore, it is possible with this report to compare the quota between comparable roles over various territories.

Additionally for reference, the planned sales figure to be delivered by the selected compensation group is shown by means of a summary table that displays the total quota, excluding overlay and a breakdown of total quota by role. (Refer to Concepts & Procedures for explanation on overlay.) Against each role, there is a headcount. In the next and subsequent tables for each role there is a list of salespeople and a simple average of the quota assigned by role.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

First table of information :

Column Title	Description
Sales Role	Lists the roles available in the Compensation Group selected
Number of People	Displays the total number of people of each assigned role
Component 1 Name	Displays the total assigned quota against this user-defined Component by role
Component 2 Name	Displays the total assigned quota against this user-defined Component by role
Component 3 Name	Displays the total assigned quota against this user-defined Component by role
Total Quota	Displays the total assigned quota for all Components for each role
Assigned Quota	Displays the rounded figure of the total quota by role

The last row displays the grand total.

Second and subsequent tables of information are listed by role or Compensation Plan :

Column Title	Description
Name	Lists the salespeople with the relevant role or Compensation Plan
Component 1 Name	Displays the assigned quota against this user-defined Component for each salesperson
Component 2 Name	Displays the assigned quota against this user-defined Component for each salesperson
Component 3 Name	Displays the assigned quota against this user-defined Component for each salesperson
Total Quota	Displays the total assigned quota for all Components for each salesperson
Assigned Quota	Displays the rounded figure of the total quota for each salesperson

The last row displays the total number of salespeople for the role and the simple mathematical average for each column.

Overassign Quota Summary

You can see in one report what the over assignment value and percentage effect is on the immediate level of salespeople and the street level salespeople. This report only displays salespeople with manager roles.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

Column Title	Description
Name	Lists the manager of the compensation group selected
Role	Displays associated roles
Plan Start Date	Displays the start date of each salesperson's assigned plan
Plan End Date	Displays the end date of each salesperson's assigned plan
Assigned Quota	Displays the rounded figure of the total quota assigned
Direct Over assign	Displays the compensation group manager's quota as a percentage of his / her directs' total quota
Street Over assign	Displays the compensation group manager's quota as a percentage of street-level salespeople's total quota

Quota Range Summary

This report allows you to scan the list for those salespeople who fall outside the range of minimum and maximum quota values predefined for each role. Contract

Approvers can use this report as a means of rejecting compensation plans or contracts that have been submitted for their scrutiny.

For each selected compensation group, the maximum and minimum quota range is displayed for each role. In addition, there is a column that shows how each salesperson's assigned quota in the selected compensation group fared against the minimum quota set for the role.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

Column Title	Description
Employee Number	Displays associated employee numbers
Name	Lists salespeople in the compensation group selected
Sales Role	Displays associated roles
Assigned Quota	Displays the rounded figure of the total quota assigned
Quota Minimum	Displays the role's minimum quota as defined under the Sales Role Details screen
Quota Maximum	Displays the role's maximum quota as defined under the Sales Role Details screen
Percent of Minimum	Displays each salesperson's actual assigned quota as a percentage of each role's quota minimum

Overlay Summary

This report lists all overlay salespeople, if any, who are members of the compensation group selected. (Refer to Concepts & Procedures for explanation on overlay.) This report is a concise display of overlay salespeople as distinct from previous reports where both overlay and nonoverlay salespeople are displayed together.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups. User is required to select one Compensation Group.

Data

Column Title	Description
Salesperson Name	Lists salespeople in the compensation group selected
Job Title	Displays each salesperson's job title as read from Oracle Resource Manager
Sales Role	Displays associated roles
Assigned Quota	Displays the rounded figure of the total quota assigned

To-Be-Hired Summary

This report lists all salespeople who have not been hired as yet, in the selected compensation group. It is a concise means of listing vacancies and additional headcount requirements on one report.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

Column Title	Description
Salesperson Name	Lists vacancies in the compensation group selected
Compensation Group	Lists the compensation group manager's name
Sales Role	Displays associated roles
Plan Start Date	Displays the start date of each salesperson's assigned plan
Plan End Date	Displays the end date of each salesperson's assigned plan
Assigned Quota	Displays the rounded figure of the total quota assigned

Transitional Salespeople

This report lists all salespeople who have not been allocated a role, in the selected compensation group. It is a means of identifying those salespeople who do not have a role for the next contract cycle.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %

Prompts	Choices	Mandatory
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

Column Title	Description
Employee Number	Displays employee numbers of the salespeople in the selected compensation group
Name	Lists salespeople in the compensation group selected
Manager Name	Lists the compensation group manager's name
Manager Number	Displays the compensation group manager's employee number

Compensation Plan Generation Status

This report lists the compensation plan activation status for all salespeople in the selected compensation group. The activation process is related to passing approved compensation plans from Sales Force Planning to commission processing (forms based part of this application). This report helps you to identify those compensation plans that have not been activated for commission processing and to take action to investigate its non-active status.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

Column Title	Description
Employee Number	Displays employee numbers of the salespeople in the selected compensation group
Name	Lists salespeople in the compensation group selected
Compensation Group	Lists the compensation group's name
Role	Displays associated roles
Plan Status	Displays the approval status of the Compensation Plan
Reason	Displays the reason for any incomplete status

Sales Role and Compensation Plan Mapping

This report lists all sales roles and how each was mapped to job title(s) as read from Oracle Resource Manager, for each compensation group selected.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

Data

The first table of information:

Column Title	Description
Role	Displays all roles that satisfy the effective date search criteria
Compensation Plan	Displays the name of each compensation plan

Column Title	Description
Start Date	Displays the beginning date of the compensation plan
End Date	Displays the lapsed date of the compensation plan

Year to Date Summary

This report is an overview of a salesperson's achievements, commission and bonus earnings and advances or draws. This report is accessible by default by the manager, salesperson and sales compensation online super user responsibilities.

The figures are grouped by period and by plan element. Super user can control which plan element appears as a quota or bonus category through the Quota Group checkbox on the Plan Element form. The pay out section is grouped by earnings type and by period.

Parameters

Prompts	Choices	Mandatory
Salesperson Name / Number	List of Values - Will contain both name and number	Yes
Salesperson Type	List of Values	
Sales Role	List of Values	Yes
Reporting Period	List of Values	Yes
Currency Type	List of Values	
Credit Type	List of Values	

Data

Column Title	Description
Commission	Commission amount salesperson earned during the specified period
Bonus	Bonus amount salesperson earned during the specified period
Other	Manual commissions amount salesperson earned during the specified period

Column Title	Description
Advance Commission	Advances that applied for the salesperson during the specified period
Total Compensation	Total amount of compensation due to the salesperson
Gross Payment	Gross Payment to the salesperson
Total Payments	Total Payment to the salesperson
Beginning Advance Balance	Beginning Advances balance for the salesperson
Current Advance Balance	Current advances made to the salesperson
Recovery Amount	Recovery amount applied for the period
Ending Advance Balance	Ending Advance balance
Commission Pending	Pending Commission Transactions
Bonus Pending	Pending Bonus Transactions

Quota Performance

This report is a snapshot of salespeople achievement and earnings. Achievements are shown against interval to date quota and annual quota. Earnings total are broken down by period to date and interval to date.

Parameters

Prompts	Choices	Mandatory
Analyst	List of Values	Yes (only for super user)
Period	List of Values	Yes
Credit Type	List of Values	Yes

Data

Column Title	Description
Name	Salesperson Name
Employee Number	Salesperson's Employee Number
Cost Center	Salesperson Cost Center

Column Title	Description
Charge to Cost Center	Cost Center where commission will be charged
Analyst	Analyst Name
Sales Role	Salesperson Sales Role
Compensation Plan	compensation plan name
Annual Quota	annual quota assigned
Percent Annual Quota	achievement expressed as a percentage of annual quota
YTD Quota Target	Year to date quota
YTD Quota Credit	Year to date sales credit
YTD Quota Earnings	Year to date quota-based earnings
YTD Bonus Earnings	Year to date bonus earned
YTD Total Earnings	Year to date total earnings (quota-based earnings plus bonus earned)
PTD Quota Target	Period to date quota
PTD Quota Credit	Period to date sales credit
PTD Quota Earnings	Period to date quota-based earnings
PTD Bonus Earnings	Period to date bonus earned
PTD Total Earnings	Period to date total earnings (quota-based earnings plus bonus)

Commission Statement

This report shows transaction details broken down by period for a salesperson. It is configurable and for instructions on how to hide or show selected columns, go to Configuring reports section below.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	List of Values	Yes
Period	List of Values	Yes
Period Type	List of Values	Yes
Compensation Category	List of Values	

Data

This standard report lists the transactions a salesperson is eligible to receive commission for during a specified period. The columns visible are controlled by the System Administrator. Users can have up to 12 columns visible without having to scroll left or right. Below is a sample of the available columns for this report.

Column Title	Description
Invoice Number	Invoice Number
Invoice Date	Invoice Date
Order Date	Order Date
Order Number	Order Number
Commission Amount	Commission Amount
Credit Receiver	Credit Receiver

Commission Summary

This report is a snapshot of salespeople achievement and earnings. Achievements are shown against interval to date quota and annual quota. Earnings total are broken down by period to date and interval to date.

This report is identical to the Quota Performance report except that there are 3 extra columns (on the far right) available through this report. This report is accessible through Sales Compensation Online Super User by default whereas the Quota Performance report is accessible by default to those users with Manager and Salesperson responsibilities.

Parameters

Prompts	Choices	Mandatory
Analyst	List of Values	Yes
Period	List of Values	Yes
Credit Type	List of Values	Yes

Data

Column Title	Description
Salesperson Name	Salesperson Name
Salesperson Number	Salesperson Number
Cost Center	Salesperson Cost Center
Charge to Cost Center	Cost Center where commission will be charged
Analyst	Analyst Name
Sales Role	Salesperson Sales Role
Compensation Plan	Compensation Plan
Annual Quota	Annual Quota
Percent of Annual Quota	Achievement as a percentage of Quota
YTD Quota Target	Year to date quota
YTD Quota Credit	Year to date sales credit
YTD Quota Earnings	Year to date quota-based earnings
YTD Bonus Earnings	Year to date bonus earned
YTD Total Earnings	Year to date total earnings (quota-based earnings plus bonus earned)
PTD Quota Target	Period to date quota
PTD Quota Credit	Period to date sales credit
PTD Quota Earnings	Period to date quota-based earnings
PTD Bonus Earnings	Period to date bonus earned
PTD Total Earnings	Period to date total earnings (quota-based earnings plus bonus)
Begin Balance	Beginning Balance of what is due to the salesperson
PTD Quota Earnings	Period to date quota-based earnings
PTD Bonus Earnings	Period to date bonus earned

Transaction Details

This report shows transactional details of the specified salesperson and is used primarily by the salesperson and sales manager. It provides the details from the

Year To Date Summary report. The report can be run to show results of any specified period and by transaction status.

It is configurable and for instructions on how to hide or show selected columns, go to Configuring reports section below.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	List of Values	Yes
Order Number	List of Values	
Adjustment Status	List of Values	
Invoice Number	List of Values	
Process Date From	List of Values	
Process Date To	List of Values	
Transaction Type	List of Values	
Adjustment Date	List of Values	
Calculation Status	List of Values	

Data

This standard report lists the transactions a salesperson is eligible to receive commission for during a specified period. The columns visible are controlled by the System Administrator. Users can have up to 12 columns visible without having to scroll left or right. Below is a sample of the available columns for this report.

Column Title	Description
Invoice Number	Invoice Number
Invoice Date	Invoice Date
Order Date	Order Date
Order Number	Order Number
Commission Amount	Commission Amount
Credit Receiver	Credit Receiver

Compensation Group Hierarchy

This report is useful not only for displaying compensation groups and the resources in each, but also for showing the roll up hierarchy of the groups in relation to each other. In the first column, the number indicates the level in the hierarchy of the compensation group. The Level 1 group is at the top of the hierarchy, and is also at the top of the report. Where there is a hyperlink, click the resource name to display a Year to Date Summary for that person.

Parameters

Prompts	Choices	Mandatory
Effective Date	List of Values	Yes
Dimension Name	List of Values	Yes
Hierarchy Name	List of Values	

Data

Column Title	Description
Hierarchy Name	Hierarchy Name
Node Name	Children Nodes of the Hierarchy specified
Effective Dates	Effective Dates

Unprocessed Transactions

This report is a useful way for locating transactions by process status. Users have the option of running this report for any calculation status, load status and adjustment status for any specified salesperson, date, transaction type, order and invoice number.

This report is configurable and for instructions on how to hide or show selected columns, go to Configuring reports section below.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	List of Values	Yes

Prompts	Choices	Mandatory
Order Number	List of Values	
Adjustment Status	List of Values	
Load Status	List of Values	
Invoice Number	List of Values	
Process Date From	List of Values	
Process Date To	List of Values	
Transaction Type	List of Values	
Adjustment Date	List of Values	
Calculation Status	List of Values	

Data

This standard report lists the transactions a salesperson is eligible to receive commission for during a specified period. The columns visible are controlled by the System Administrator. Users can have up to 12 columns visible without having to scroll left or right. Below is a sample of the available columns for this report.

Column Title	Description
Invoice Number	Invoice Number
Invoice Date	Invoice Date
Order Date	Order Date
Order Number	Order Number
Commission Amount	Commission Amount
Credit Receiver	Credit Receiver

Report Access by Responsibility

x indicates that the report is accessible with the corresponding default responsibility

	Sales Force Planning Super User	Sales Force Planning Finance Manager	Sales Compensation Online Super User	Sales Compensation Manager	Sales Compensation Salesperson
Planning Reports					
Quota Model Summary	**x**	**x**			
Average Quota Summary	**x**	**x**			
Overassign Quota Summary	**x**	**x**			
Quota Range Summary	**x**	**x**			
Overlay Summary	**x**	**x**			
To-Be-Hired Summary	**x**	**x**			
Transitional Salespeople	**x**	**x**			
Plan Generation Status	**x**				
Role To Plan Mapping	**x**				
Performance reports					
Year-To-Date Summary			**x**	**x**	**x**

	Sales Force Planning Super User	Sales Force Planning Finance Manager	Sales Compensation Online Super User	Sales Compensation Manager	Sales Compensation Salesperson
Quota Performance			x	x	x
Commission Statement			x	x	x
Operational Reports					
Commission Summary			x		
Transaction Details			x		
Hierarchy			x		
Exception Report					
Unprocessed Transactions			x		

Configuring Reports

Each JSP report that has been developed has a corresponding region in AK. It is this information that determines what end users will have displayed on their screens in the form of the reports. System Administrators can go into the AK Developer responsibility and configure the JSP reports.

NOTE: JSP reports can share the same AK region. By making any changes to the AK region, users will hide or show the column in all reports referencing the same AK region.

Prerequisites

System Administrator access privilege is required.

Steps

1. Login as System Administrator
2. Select AK Developer responsibility
3. Select Define Regions
4. Query the specific JSP Name
5. Press Region Items button in the lower right hand corner
6. All the region information will appear on the screen. To hide or show columns, the System Administrator will have to select or deselect the check box labeled 'Node Display'.