

Oracle[®] Incentive Compensation

Implementation Guide

Release 11*i*

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ORACLE[®]

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Oracle Incentive Compensation Implementation Guide, Release 11i

Part No. A90474-02

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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- Do you need more information? If so, where?
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If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Incentive Compensation Implementation Guide. This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Incentive Compensation

If you have never used Oracle Incentive Compensation, Oracle suggests you attend one or more of the Oracle Incentive Compensation training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Incentive Compensation.

- Chapter 1 is an introduction that covers general features, lists new features in this release, and discusses the HTML user interface.
- Chapter 2 contains the technology stack for this release.
- Chapter 3 lists dependency requirements.

- Chapter 4 presents an overview of the implementation steps in table format.
- Chapter 5 comprises the main body of the document, with the implementation steps detailed step by step.
- Chapters 6 and 7 will contain verification, diagnostics, and troubleshooting information as it becomes available.
- Chapter 8 discusses integration between Oracle Incentive Compensation and other Oracle products.
- Chapter 9 is a Glossary of the most important terms used in the document.
- Appendix A contains a detailed listing of flexfields used in Oracle Incentive Compensation.
- Appendix B presents the numerous lookups used in Oracle Incentive Compensation, with many additions for this latest version of the product.
- Appendix C details the profile options used in this latest release of Oracle Incentive Compensation.
- Appendix D presents a useful road map that compares the navigation in the previous version of the application, which was primarily in Forms, to the latest release, which uses HTML.
- Appendix E shows the different responsibilities used in Oracle Incentive Compensation and the access each responsibility has to the tabs in the application.

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. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The

conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Incentive Compensation.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Incentive Compensation shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Incentive Compensation.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Incentive Compensation (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Incentive Compensation Concepts and Procedures

This guide contains two sections. The first, Understanding, explains the basic functions of the application. The second section, Using, contains the text of the online help for Oracle Incentive Compensation.

Oracle Incentive Compensation Technical Reference Manual

Use this manual to obtain the specific technical details used in setting up Oracle Incentive Compensation.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7

(NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Other Implementation Documentation

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Incentive Compensation implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Incentive Compensation and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Incentive Compensation working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Oracle Metalink

Oracle Metalink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle Metalink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use Metalink, register at (<http://metalink.oracle.com>).

Alerts: You should check Oracle Metalink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Introduction

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

1.1 Oracle Sales Family Overview

Oracle Sales is a comprehensive family of tightly integrated applications to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and web storefronts to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

The Oracle Sales Family includes:

- Sales Online
- Field Sales Laptop/Palm/Wireless
- TeleSales
- Incentive Compensation
- Partners Online
- Oracle Collections
- Sales Intelligence

1.2 Oracle Incentive Compensation Overview

Using Oracle Incentive 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 greatly from one company to another, a compensation system that produces windfall sales for one company might not suit another. Oracle Incentive Compensation calculates and assigns compensation based on functions that precisely mirror the operations of your sales organization.

1.2.1 Oracle Incentive Compensation Features

Oracle Incentive Compensation enables you to perform a wide variety of different functions.

You can define the structure of a compensation transaction, or the set of information your sales organization needs to calculate incentive compensation. You specify the data you need, and Oracle Incentive Compensation then collects this data for you from the sources you specify.

You can categorize your business revenue into revenue classes that specify the types of revenue that warrant compensation in your organization. Oracle Incentive Compensation assigns a revenue class to a compensation transaction using a set of classification conditions you define for each class. Oracle Incentive Compensation only awards credit based on the revenue classes you assign to a salesperson's compensation plan, so you can pay a salesperson for certain revenue classes but not for others.

You can 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.

You can define how your organization tracks and pays incentive compensation.

You can specify how your organization typically makes adjustments.

You can view information about your salespeople and also make customizations to their individual compensation plans. You can view a salesperson's compensation summary, compensation plan, sales roles, and compensation group. In addition, you can assign pay groups and payment plans to customize the way a salesperson is paid.

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

You can model different versions of compensation plans before you distribute them to salespeople.

As a manager, you can systematically distribute your quota to the salespeople who report to you directly. Your salespeople can accept their plans by using Oracle Sales Online, after which you can approve the plans in Oracle Incentive Compensation.

1.3 New in This Release

In this release of Oracle Incentive Compensation 11i, an [HTML user interface](#) replaces the Forms user interface used in the previous release. This change improves integration of Oracle Incentive Compensation with other Oracle products, and is in line with the consistent look and feel of other HTML based Oracle CRM applications. The HTML interface reduces the number of steps and drilldowns required to perform some functions.

This section contains some mentions of Forms navigation. This is meant to clarify the functions of the new tab structure for users who are upgrading from previous releases of Oracle Incentive Compensation. For a complete listing comparing Forms to HTML navigation, refer to Appendix D, Road Map.

The change to HTML means that the Forms Navigator, icons, "View By" drop-down lists, and hierarchies are replaced by a row of nine tabs, using subtabs and side panel menus to display finer levels of detail.

Listed below are the nine tabs in Oracle Incentive Compensation. Explanations of each tab follow the list.

[The Home Tab](#)

[The Incentive Tab](#)

[The Modeling Tab](#)

[The Resource Tab](#)

[The Quota Tab](#)

[The Transaction Tab](#)

[The Requests Tab](#)

[The Product Tab](#)

[The Administration Tab](#)

1.3.1 The Home Tab

The Home tab is the starting point for using Oracle Incentive Compensation. It is configured to supply the information that is most important to you at a glance.

On the left side of the page you can display up to four predefined summary reports, called **bins**. Bins contain links that enable you to drill down to more detailed information.

The rest of the Home tab page is configured to display one or two full reports that you select, which will display every time you open the Home page.

1.3.2 The Incentive Tab

The Incentive tab is where compensation plans are built, viewed, and activated. There are seven subtabs.

The first subtab, Agreement, opens to an Agreements search page. Click the link in the Name column of search results to go to the Sales Role Detail page.

The Activation subtab lists roles by name and shows their activation status. This is where roles are activated.

The Plan subtab corresponds to the Compensation Plans view in Forms, and works in much the same way. Below the subtab level you can assign plan elements and sales roles.

The Element subtab corresponds to the Plan Elements view in Forms. Drill down on a plan element on the opening page to go to the Plan Element Details page. Update and Restore buttons are a new feature of the HTML version. You can assign formulas and revenue classes in this subtab.

The Formula subtab corresponds to the Formulas view in Forms. The Input and Output tabs in Forms are combined into an Assign Expressions page in HTML, which also takes the Performance Measure section from the Forms General tab. A new Planning check box appears in the Rules area.

The Rate subtab corresponds to the Rate Tables view in Forms. This subtab is where rate dimensions are created.

The Expression subtab corresponds to the Calculation Expressions view in Forms. The function of the Forms window remains in HTML, but the node structure is

replaced with a drop down menu. Select a category, such as Elements or Formulas, from the drop down menu to display the choices for that category.

1.3.3 The Modeling Tab

The Modeling tab accesses a new what-if modeling feature in this release of Oracle Incentive Compensation. An extension of the original Salesforce Planning functionality, modeling enables incentive planners to experiment with creating an agreement and assigning it to a role before defining details and associating a resource with a role in Salesforce Planning. Several variations can be compared side by side.

The three subtabs in the Modeling tab are Agreement, Comparison, and Performance. All three subtabs open to a search page and then display summary pages that show various versions of an agreement.

The Agreement subtab has links to the Agreement Version Details page, complete compensation plan data, and a pop-up window to assign a quota to a version.

The Comparison tab displays data for different plan versions and also enables you to compare versions on a graph.

The Performance tab shows Estimated Achievement and Estimated Payout fields along with other plan version information. Drill down on a version name to open an Estimated Achievements pop-up window.

1.3.4 The Resource Tab

Use the Resource tab to manage information about resources. The Resource tab contains four subtabs, including Planning, Resources, Role, and Group.

The Planning subtab enables a search for resources and links to the Resource Details page. Links to the resource names enable drilldowns to detail pages.

The Resources subtab replaces the Salespeople Workbench in Forms. The information areas from the four tabs of the Forms Salespeople Workbench are now side panel menu items under the Resources subtab.

The Role subtab replaces Sales People icon > View By Sales Roles in Forms. You can drill down and assign compensation plans in the Assign Compensation Plans page.

The Group subtab enables a view of the compensation groups to which a logged-in user is a member. Click a group name on the Groups page, and then you can view details and a hierarchy by clicking links on a side panel menu.

1.3.5 The Quota Tab

The Quota tab in the new version of Oracle Incentive Compensation incorporates the Quota tab from Salesforce Planning, which stood alone in HTML in the previous version. The same four Quota tab subtabs carry over: Allocate, Approve, Distribute, and Activate. A fifth subtab, Report, brings in the functionality of the previous Salesforce Planning Reports tab.

The Allocate subtab enables a search for compensation groups. The Quota Allocation Details page displays the assigned quota and plan status for each resource.

The Approve subtab enables you to view the details of contracts to be approved. You can submit the plan for approval from this page by using the Action column drop down list.

The Distribute subtab enables you to distribute approved contracts by using the Distribute column.

The Activate subtab enables you to activate contracts that are distributed and accepted so that they can be used in Oracle Incentive Compensation.

The Report subtab contains a list of 10 reports to choose from.

1.3.6 The Transaction Tab

The Transaction tab provides nine tabs: Collect, Import, Adjust, Load, Calculate, Notification Log, Post, Payment, and Report.

Use the Collect subtab to find past collection submission records. The View Request Status page allows you to view the collection type, phase and status of the transactions collected, with a default of All in each. On the Submit Request page you can indicate a start period and end period, and submit a request for a new collection. The Runtime Parameters page enables you to narrow the collection process by changing the runtime values of your parameters.

Use the Import subtab to import transactions from other parts of Oracle Incentive Compensation. An imports wizard is available for creating new imports.

Use the Adjust subtab to correct errors in information or credit assignment. You can create a new transaction or load a transaction from the first page of the subtab.

Use the Load subtab to copy transactions from the Transaction Interface Table into Oracle Incentive Compensation.

Use the Calculate subtab to run calculation processes. The opening page enables you to select a batch name or create a new batch by clicking the Create button.

Use the Notification Log subtab to see the Notify Log. The Notify log automatically records every change in the system that affects calculation and lists what part of the calculation must be rerun as a result of an event.

Use the Post subtab to view and submit requests for posting submissions.

Use the Payment subtab to create or view information on a payrun. A payrun pays members of a paygroup for a particular pay period.

Use the Report subtab to view the eight production reports formerly found in HTML under the Setup tab in the Payment responsibility.

1.3.7 The Requests Tab

The Requests tab groups requests relating to transactions into one place. The five subtabs, Collection, Transaction, Calculation, Posting, and Payment, have some redundancy with pages on the Transaction tab, particularly in the Collection and Calculation areas.

Collection - Use to submit collections. Three subcategories include View Request Status, Submit Request, and Runtime Parameter.

Transaction - Use this subtab to identify all credit memos and payments that need to be split. The invoice splits are automatically tracked in the system.

Calculation - Use this feature to display a summary of calculations based on your search parameters, and to view details of a particular batch.

Posting - Use this page to view the status of requests or to submit requests. A Process Log can be displayed.

Payment - On this page you can choose to submit a concurrent request or a payment request.

1.3.8 The Product Tab

The product tab is used to manage products and their price lists. In a connection to Oracle Marketing Online, this tab is used to work with products or product bundles. Use of the tab in Oracle Incentive Compensation is optional.

Functions include:

- Searching, creating, or viewing details for a product or a product bundle in inventory
- Creating or viewing offers for a product or a product bundle

- Specifying products for a product bundle
- Modifying a product or product bundle
- Displaying, creating, or modifying price lists
- Other activities relating to marketing products and product bundles

The Product tab is accessed through Oracle Marketing Online. See the section, "Implementing the Product Tab" in the Oracle Marketing Online documentation.

1.3.9 The Administration Tab

The Administration tab is the home of many of the setup functions formerly accessed by drop-down menus on the Forms toolbar. Administration tab functions are those that are provided when Oracle Incentive Compensation is implemented, but are infrequently changed afterwards.

The Administration tab has multiple subtabs, including General, Marketing, Partner, Sales, Incentive, and Collections, to enable administrative functions in different Oracle products. The Incentive subtab is the one documented here.

Click the Incentive subtab to open a side panel menu with 20 selections. Their primary functions are listed below:

Parameter - View and set System Parameters.

Tables - Define tables from Accounts Receivable, Order Management, or an external source that are used in collecting and calculating transactions in Incentive Compensation.

External Table - Map external tables to destination tables in Oracle Incentive Compensation.

Accumulation Period - Change the status of accumulation periods.

Pay Periods - View essential information about pay periods that are set up for a particular calendar.

Interval Types - View and define interval types.

Revenue Class - Create or remove revenue classes and assign expense codes and liability codes.

Ruleset - Create and synchronize rulesets in the rules hierarchy.

Hierarchy - Display hierarchy types and create, remove, or edit them, and set the effective date intervals.

Credit Type - Set credit types.

Credit Conversion - Set conversion rates between credit types.

Collection - Set up and maintain transaction sources, including type, status, line table name and key column information. There are six subheadings within this subtab, including Transaction Sources, Source Tables, Queries, Mapping, Actions, and Generate.

Paygroup - View, create, or remove pay groups.

Payment Plan - View payment plan data, with check boxes to indicate if compensation is recoverable or to be paid later.

Payroll - Map Oracle Incentive Compensation plan elements to Payroll Pay Elements. Remove or deactivate elements, or map input values.

Component - Display or remove Quota Components by name, description, type, unit/revenue, and computed flag.

Attainment - Add, delete, or edit existing attainment schedules by defining the specific levels of quota achievement.

Job Titles - Assign a Sales Role to a Job Title.

User Access - Set the access privilege of users with finance manager responsibility only.

Settings - Set the Transaction Calendar and write Contract Text for a compensation plan.

Seasonality - Set up a schedule to define the pattern of a product or service income by period in the form of proportions expressed in percentages of the year's total.

1.3.10 Seasonality

Seasonality schedules show how a product/service income or cost/expense is distributed throughout the year, expressed in percentages of the year's total. Seasonality schedules can be assigned to multiple agreements, and agreements can use multiple seasonality schedules for different components. Because of the variability from period to period, a new hire's quotas and pay are affected. If seasonality schedules are not assigned, an even distribution is assumed by default, where each period's quota is the same amount for the entire year.

Seasonality schedules are built using the Incentive subtab of the Administration tab in Oracle Incentive Compensation.

1.3.11 Workday Calendar

The workday calendar is a type of transaction calendar. A transaction calendar can be defined to contain only workdays and exclude weekends and holidays. For example, a USA Workday Calendar 2001 can be defined to list only the workdays in the United States for the calendar year 2001. Also, a calendar's duration can be defined to match the organization's financial year. A new workday calendar can be assigned every year as the dates of holidays and weekends will differ.

1.3.12 Regoaling

Regoaling is a new functionality that enables managers to change the quota or variable pay of a salesperson's compensation plan at any time. These changes could be required because of:

- A change in business circumstances
- A salesperson is receiving too much commission
- A salesperson is receiving too little commission
- A salesperson receives a promotion to a new role with a new goal

Regoaling can only be used if a plan is already accepted and activated.

Regoaling uses new seasonality and workday calendar features to calculate the exact amount to be paid. Seasonality allows planners to assign different quotas to each month to accommodate business cycles, and the workday calendar lets planners count each workday of each month, accounting for holidays and weekends. Seasonality can only be used on noncalculated plan elements, such as Licenses and salary.

For example, a salesperson's compensation plan has effective dates of January 1 to December 31. The salesperson can receive a new compensation plan on the 24th of July and the exact amount of compensation can be calculated for the rest of the year, based on the quotas assigned to August through December and on the exact number of work days remaining in July.

Prerequisites

Log in as an Incentive Compensation Super User or Sales Manager responsibility.

Workday calendar profile must be set up in Forms. The transaction calendar must be set up in General Ledger and selected from the drop down list in Administration > Incentive > Settings. Seasonality must be set up in Administration > Incentive > Seasonality.

Steps

1. Click the Incentive Tab and click the Agreement subtab.
2. Use the search parameter to list roles.
3. Click a role.
The Sales Role Details page appears.
4. Select seasonality in the Variable Pay, Non Computed Components area.
5. Use workday calendar with fixed pay elements.
6. Select Rate calculation method:
 - Anchors - These must be defined separately
 - Manual - Use the predefined rate table
 - Single Tier - all transactions are compensated at the same rate
7. Click Submit to enter any changes.
8. Click the Resource tab. The Resource Search page on the Planning subtab appears automatically.
9. Use parameters to search for the resource.
10. Click the Resource name on the Resource Search Results page.
The Resource Details - Main page appears.
11. Check the Adjust Quota radio button.
12. Click Update.
The Resource Details - Quota Adjustment page appears.
13. Check the button next to an existing role to adjust it, or click the button next to the blank row to enter information for a new role.

If you are regoaling an existing role, enter start and end dates for the new quota. Be sure to set the end date an old quota the day before the start of a new one.
14. Click the link to Quota Allocation Details.
The Allocation Details - Quota and Pay Assignment page appears.
15. Click Prorate.

16. Adjust any prorated amount that you want to manually. This is good for rounding amounts to even numbers.

When you change the amounts manually, it changes the proration factor, which changes the On Target Earnings (OTE) as well.

17. After you have made any changes you want to make, click Update to save them.

18. Click Lock.

19. Click Generate.

The Generate button then becomes the Submit button.

20. Click Submit to submit the plan to the Contract Approver.

21. Click the Single Tier Rate link to go to the Allocation Details - Rate page.

22. Check the Standard Rate button if you want to calculate based on the computed figures. Click the Effective Rate button if you want to base calculations on previous achievements.

23. Click Generate Effective Rate.

After the plan is submitted to the Contract Approver, it needs to be approved by someone with the responsibility of Contract Approver or Incentive Compensation Super User. This is the procedure:

Steps

1. Click the Quota tab and click the Approve subtab.

The Resource Search page appears.

2. Enter search parameters and click Go.

The Resource Search Results page appears.

3. Click the salesperson name link to go to the Contract Approval Page.

4. Select Approve in the drop down list in the Action column next to contracts you want to approve. You can also click Approve All to approve all of the submitted contracts at once.

5. Click Distribute.

A manager can distribute a plan by using My Salespeople in Oracle Sales Online.

After the compensation plan has been distributed, the resource must log into Oracle Sales Online to accept the plan, using the following procedure:

Steps

1. Click the Compensation tab and click the Compensation Plan subtab.
The plan status is Issued.
2. Click the Rate link to go to the Contract page.
3. Review the contract and click Accept to accept the contract.
The plan status changes to Accepted.
4. Click the Printable button to print out a hard copy.

To Activate the sales role, perform the following procedure:

Prerequisites

Log in as Incentive Compensation Super User responsibility. The compensation plan must already be accepted by the resource.

Steps

1. Click the Incentive tab and click the Activation subtab.
The Role Activation page appears.
2. Check the Activate check box.
3. Click Update.
4. To activate all plans, click Activate All.

To activate the salesperson, perform the following procedure:

1. Click the Quota tab and click the Activate subtab.
2. Enter parameters in the Resource Search page to find the salesperson you need.
The Resource Search Results page appears.
3. Click the name in the Salespeople Name column.
The Compensation Plan Activate page appears.
4. Click the check box in the Activate column.
5. Click Activate.

1.3.13 Invoice Splits

In Oracle Incentive Compensation, invoice lines with percentage splits to credit receivers are collected from the feeder system. A new feature of this version of the application enables any subsequent Accounts Receivable adjustments, for example, credit memos or payments, that are collected can be automatically distributed according to the percentages established by the invoices that are collected.

Prerequisites

The invoices are created in Accounts Receivable and they show a split commission. Credit Memos are created. Log in as Oracle Incentive Compensation Super User responsibility.

Steps

1. Click the Transaction tab and click the Collect subtab.
2. Run Collect Invoices concurrent request for the month the invoices were posted to GL.
3. Click the Adjust subtab.
The Transactions page appears.
4. Query the invoice number and verify the split percentages.
5. Query for the date of the credit memo.
The transaction amount, direct resource name and split percentage are displayed.
6. Query the invoice and change the split percentage for the sales credit to the new resource.
7. Query the credit memo again. The transaction amount, direct resource name and split percentage will reflect the new percentage split. Any future credit memos should reflect the new split percentages.
8. To change the resources in a split, click the Adjust subtab and query a credit memo based on the date or on the resource's name.
9. Delete the resource you want to take out and add the new resource in his or her place.
10. A reversal will be created for the old resource and the new resource will appear.
11. Query the credit memo transaction and the new resource will appear.

Guidelines

The change of resource delinks the invoice from the credit memo for any future changes.

Making an adjustment to an invoice that has a credit memo attached to it creates two sets of frozen and reversal transactions and a new transaction.

Four fields are not editable for transactions that are not Manual:

- Invoice Number
- Order Number
- Split Percentage
- Revenue Type

You cannot split a non revenue transaction with a revenue type transaction. An error message is displayed.

An invoice split is valid only if the sum of the split percentages is equal to the original split percentage. An error message is displayed if the percentages do not match.

Non-revenue type transactions can be split.

A Deal Split creates three results:

- Frozen
- Reversal
- New

Splits can be performed for more than one person.

Deal Move and Share Credits are obsoleted.

The Currency code can be changed only for Manual transactions.

1.3.14 Draw and Recovery

Draws are a mechanism to pay salespeople a minimum amount of compensation for a specified period of time. As part of the agreement with salespeople, this amount can be recoverable or nonrecoverable. You can define the period that the draw and recovery will be in effect.

In this version of Oracle Incentive Compensation, additional features have been added to the Draw and Recovery functionality. Now, the recovery schedule and

draw amount can be set up independently of the earnings for the period. And, a recovery amount due from a salesperson can be waived.

To accomplish this, two new options are placed on the Payment Plans page (Administration tab > Payment Plan subtab). These are Recovery Interval and Pay Against Commission. In addition, a Waive Recovery option is added to the Payment Transactions page.

Recovery Interval lets you set up a recovery interval different from the pay interval. In this version of Oracle Incentive Compensation, period, quarterly, and annual intervals are provided, with the pay interval as the default setting. For example, if you set up a quarterly recovery interval, the application will calculate any recovery amount when the third monthly payment is prepared.

Pay Against Commission determines whether or not the payment plan applies its rules using the earnings that have been collected in the application when calculating commission at the end of the recover interval.

Waive Recovery allows you to waive the recovery line item with the Type payment plan. This can serve as an incentive for a salesperson who performed well but did not make their quota, perhaps for a reason outside of their control.

1.3.15 Importing Transactions

In this release of Oracle Incentive Compensation, you can import transactions in a batch using Excel spreadsheets. Click the Transactions tab and click the Import subtab to use this feature.

1.4 Navigation

This release of Oracle Incentive Compensation 11i uses two different technology stacks: Java Server Pages (JSP) and Forms. Now, you can use an HTML based JSP user interface for all Oracle Incentive Compensation functions. However, in this release, you must use the Forms instance in some cases, for example, to access Resource Manager, General Ledger, or AOL to set profile options or set lookups.

1.4.1 HTML Navigation

The new HTML user interface uses five levels of navigation: global icons, tabs, subtabs, and side panel menu (two levels). Most of the features in previous Forms versions of Oracle Incentive Compensation have been converted, and are placed in different, more logical locations. See *Appendix D Road Map* for a complete listing. In addition, some data entry and organization has changed. In general, the

HTML-based pages are easier to use and require fewer drilldowns to complete a task.

For example, to see a listing of plan elements or to create new ones, navigate to the Incentive tab > Element subtab. When navigating in HTML, place your cursor over a tab or subtab, the arrow changes to a pointing hand. Click to go to the new page.

HTML pages provide links to other pages. Links are shown as underlined text. Use a link the same way you use a tab or subtab:

1. Roll the cursor onto the link.
2. Click the left mouse button.

The new page appears.

In the previous version of Oracle Incentive Compensation, to view or create plan elements you clicked the Compensation Plans icon, selected View By Plan Element, and then opened a node in the Navigator. After opening a plan to view it, four tabs appeared, for General information, Revenue Class, Formula, and Rate Tables. In the new HTML interface, formulas and rate tables are found on neighboring subtabs, along with the calculation expressions used to create them. Revenue classes, which are less frequently changed, now are placed on the Administration tab.

Many tabs and subtabs open with a brief search page. Enter search data in a field or use a list of values, click Apply, and a summary page appears. Continue to search using the search button, or move to the next group of rows by clicking the drop down list and then selecting a range. In some cases, you can click the Next or Last links to see the following or final group of listing, or click the First or Previous links to view the first or previous listings. If there are hundreds of items listed, the drop-down lists enable easier selection.

HTML pages use a Quick Find search field, located at the top of the page just below the subtabs. Each subtab has a Quick Find, with a drop down menus and an Advanced Search link. Many pages provide a wildcard search and drop down menus in the parameters area near the top of the page. A Go button is provided to initiate searches of lists of values. Many of the pages that display tables use Update, Restore, and Create buttons at the beginning and end of the display:

Update - Used to saving newly entered data

Restore - Returns the display to the original content before the last save

Create - Opens a new page on which to create new data

Technology, Requirements, and Performance

2.1 Architectural Overview/Technology Stack

The application architecture for Oracle Incentive Compensation is as follows:

Technology Stack:

- Oracle Forms Designer, version 6.0.8.10.3
- Oracle 8 Enterprise Edition Release, version 8.1.6
- Oracle Reports Designer, version 6.0.8.8.3
- Oracle WebDB, version 2.2.2.1
- Apache version, version 1.3.9
- Java Developer Kit Server Side, version 1.1.8

Dependency Requirements and Verification

3.1 Mandatory Dependencies

Oracle Incentive Compensation requires the following related products and components to be installed and implemented:

Oracle Resource Manager

3.2 Conditional Dependencies

Oracle Order Management or third party collection program

Oracle Workflow

Oracle iStore

Oracle Marketing Online

Oracle Partners Online

Oracle Sales Online

Oracle Telesales

Oracle Payroll

Oracle Inventory

Oracle Order Management

Oracle Payables

Oracle Receivables

3.3 Installation and Dependency Verification

Create users and assign Oracle Incentive Compensation Super User responsibility and System Administrator responsibility to one or more users. All of Oracle Incentive Compensation can be completed using these responsibilities.

Implementation Overview

4.1 Implementation Task Sequence

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

Note: In the Mandatory column, an asterisk (*) next to No means that the step is optional, and is only required if Salesforce Planning is used.

Prerequisites

Completion of installation and implementation steps as outlined in the following documents:

- *Oracle System Administrator's Guide*
- *Supplemental CRM Installation Steps Release 11i*

Steps

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
Yes	5.1	General Ledger Setups <ul style="list-style-type: none"> a. Define Period Types b. Define Calendar c. Define Periods d. Define Currency e. Define Set of Books f. Describe Responsibilities Reference: <i>GL Implementation Guide</i> or <i>GL User's Guide</i>
Yes	5.2	System Parameters (i) Pick Set of Books This step will populate currency and calendar within Oracle Incentive Compensation.
Yes	5.3	Open/Close GL Periods
Yes	5.4	Open Accumulation Periods
No	5.5	Tables
Yes	5.6	Define External Table Mapping
Yes	5.7	Define Calculation Expressions
Yes	5.8	Define Rate Dimensions
Yes	5.9	Define Rate Tables
Yes	5.10	Define Formulas
No*	5.11	Associate Responsibilities with Responsibility Groups
No	5.12	Default Contract Text
No*	5.13	Define User Access
No*	5.14	Define Quota Components
No*	5.15	Define Attainment Schedule
Yes	5.16	Define Roles Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures (Resource Manager)</i>

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
Yes	5.17	Define Role Details
No*	5.18	Define Jobs Reference: Appropriate sections <i>HRMS Implementation Guide</i> or <i>HRMS User's Guide</i> (Resource Manager)
No*	5.19	Associate Jobs with Roles
Yes	5.20	Define Resource Groups (Compensation Groups) Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	5.21	Define Resources Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	5.22	Assign Resources to Roles and Groups Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
No*	5.23	Assign Roles to Job Titles
No*	5.24	Assign Job Titles to Salespeople
No*	5.25	Customize On Target Earnings and Anchors
No*	5.26	Assign and Distribute Quotas to Salespeople
No*	5.27	Salespeople Accept Plans using Oracle Sales Online
Yes	5.28	Activate Pay Periods
Yes	5.29	Define Pay Groups
No	5.30	Set Up Collection Mapping a. Direct Mapping b. Indirect Mapping c. Custom Source Mapping
No	5.31	Set Up Expense/Liability Account Mapping a. Revenue Classes b. Classification Rules c. Plan Elements
No	5.32	Set Up Plan Element to Oracle Payroll Pay Element Mapping

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
Yes	5.33	Map Classification Attributes and Collection Attributes. Referred to in Oracle Incentive Compensation as "Tables".
Yes	5.34	Define Revenue Classes
Yes	5.35	Define Revenue Class Hierarchy
Yes	5.36	Define Classification Rule Sets for Revenue Classification
No	5.37	Define Interval Types (optional)
No	5.38	Define Credit Types (optional)
Yes	5.39	Define Plan Elements
Yes	5.40	Define Compensation Plans
Yes	5.41	Define Roles Reference: Appropriate sections of <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	5.42	Define Resource Groups (Defined in Oracle Incentive Compensation as Compensation Groups) Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	5.43	Define Resources Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	5.44	Assign Resources to Roles and Groups
Yes	5.45	Assign Compensation Plans to Roles
No	5.46	Define Payment Plans (optional)
Yes	5.47	Assign Pay Groups to Salespeople
No	5.48	Assign Payment Plans (optional)
No	5.49	Customize Quota/Rates for Salespeople (optional)

Implementation Tasks

5.1 General Ledger Setups

To use Oracle Incentive Compensation you must define the period types, calendar, periods, currency, 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 Incentive Compensation using the System Parameters side panel menu option in the Incentive subtab of the Administration tab. Refer to *Oracle General Ledger User's Guide*, Chapter 9, Setup.

5.1.1 Define Period Types

Oracle Incentive Compensation requires the period types to be defined in General Ledger so that compensation can be calculated. Examples of period types are:

- week
- month
- quarter
- year

Custom period types can be defined, such as six weeks or fiscal year.

5.1.2 Define Calendar

Different business activities require different calendars to be defined. Examples of these calendars include Fiscal, Standard 12-month, or variations such as a Fiscal 13-month calendar with 12 months and an adjustment period.

5.1.3 Define Periods

After the period types are defined, the periods themselves must be created. For example, if periods are months, the 2001 calendar would include January 2001, February 2001, and so on.

5.1.4 Define Currency

Any currency that Oracle Incentive Compensation needs to calculate compensation must be defined in General Ledger. For example, if your company trades in North America, you want to define US dollars, Canadian dollars, and Mexican pesos. Multiple forms of the same currency can be defined as well, such as US dollar (next day) and US dollar (same day).

5.1.5 Define Set of Books

Oracle Incentive Compensation requires that a set of books be set up in General Ledger. The set of books includes a chart of accounts, functional currency, calendar, period types. A set of books can be used for your entire company or different sets of books can be set up for different divisions or locations.

5.2 System Parameters

5.2.1 Pick a Set of Books in Oracle Incentive 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 Incentive Compensation processes incentive 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

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

Steps

1. 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 this information obtained from the GL books:

- Currency associated with this set of 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)

5.2.2 Collection

Steps

1. Select a collection batch size. This affects the amount of time the application requires to process the total transactions.
2. Select a transfer batch size.
3. Select the number of takeback grace days. This determines the number of days allowed after the payment due date before sales credit is taken back.

5.2.3 Calculation

Steps

1. Configure a transaction batch size, salesperson batch size, and rule batch size that are appropriate to your calculation requirements.
2. Select the Managerial Rollup check box if you want sales credits to roll up through the compensation group hierarchies.

5.2.4 Payment

Steps

1. Indicate whether Oracle Payable and Payroll are implemented.
2. Use the Account Generation field to instruct the application from what level you want account codes to be generated. Select Revenue Class, Plan Element, Custom, or Classification from the drop-down list. Assigning account codes

allows you to select a finer grain of classification of transactions if needed before they are sent to Accounts Payable.

5.3 Open and Close GL Periods

To administer Oracle Incentive Compensation periods, set up your periods to the future enterable state. It can be Never Opened at the beginning. When you are ready to calculate the 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.

To change period status, perform the following procedure:

Steps

1. To change period status, navigate to the Periods window, or by default, use GL form for this.

The following information is displayed:

- For Period 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

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.

5.4 Open Accumulation Periods

Use the Accumulation Periods page to set the status of your accumulation periods, or freeze them to enable them to be opened for a year-to-date summary for a salesperson using Oracle Sales Online.

Most of the Accumulation Periods page is read-only information. The System Status, Calendar, and Period type fields at the top display information that was set previously.

Steps

1. To change period status, select it from the drop-down list.
2. Select the Freeze check box to enable a YTD summary.
3. Click **Previous Year** to display accumulation periods for the previous year; click **Next year** to display next year's accumulation periods.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your changes.

Note: After 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.

5.5 Tables

Use the Tables page to define tables from Accounts Receivable, Order Management, or an external source that are used in collecting and calculating transactions in Incentive Compensation. Tables must be defined before they can be used in collection or calculation.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. On the side panel menu, click **Tables**.
The Tables page appears.
3. If you want, enter search parameters by Schema, Table Name, or User Name.
4. Click **Apply**.

To enter new Tables, perform the following procedure.

1. Enter a Schema in the Schema field. Click **Go** to open a pop-up list from which to select a name.
2. Enter a Table Name from which you want to collect data. Use the pop-up list if necessary.

3. Enter a user name.
4. Enter a description if desired.
5. In the Usage column, select Collection, Calculation, or None from the drop-down list.
6. Use the details field to add any useful information. Click **Columns** in the details column to go to the [Columns](#) page.
7. If necessary, click **Restore** to return to the previously stored information.
8. Click **Update** to save your work.

5.5.1 Columns

Use the Columns page to link a user name for an attribute to the application's name for it. This process makes the names easier to use because they specifically describe the attribute. For example, *Sales Region* is easier to remember and apply than *Attribute 6*.

Select a view from the View drop-down list. Each of the four choices presents the column data differently. All four views display the Column Name, User Name, and External Call columns. Each view then displays relevant columns, as follows:

- Column View: Adds Data Type and Data Length columns, and Usage and Foreign key check boxes.
- Dimensions View: Adds Dimension Name column and Value check box.
- Classification View: Adds Classification drop-down list and Value Set Name column.
- Primary Key View: Adds Primary Key check box and Position column.

Prerequisites

None

Steps

1. Make a selection in the View drop-down list.
2. Click **Apply**.
3. Use the search drop-down list to narrow find the column name you need.
4. For all views, enter data in the User Name and External Call fields as required. Make sure the user name is easy to understand and use.

5. For the Columns view, perform the following steps:
 - a. The Data Type read-only field indicates if the column contains alphanumeric material (VARCHAR2), numerical data (NUMBER), or a date (DATE).
 - b. The Data Length read-only field shows the maximum number of characters that can be entered in the field.
 - c. Check the Usage check box if you plan to use the column for calculation.
 - d. Check the Foreign Key check box if you plan to use the column as a foreign key to collect data from the table.
6. For the Dimensions view, perform the following steps:
 - a. Enter a dimension name in the Dimension Name field. Click **Go** to select from a pop-up list.
 - b. Check the Value check box if you want to use the User Name field.
7. For the Classification view, perform the following steps:
 - a. Check the Value check box if you want to use the column in classification.
 - b. Select a classification from the Classification drop-down list. Choice include alphanumeric, Date, and Numeric.
 - c. Enter a value set name in the Value Set Name field. Click **Go** to search for value set names. You must enter at least four characters to search.
8. For the Primary Key view, perform the following steps:
 - a. Check the Primary Key check box if you want to use the column as the primary key in the table.
 - b. The Position column is unused in this release.
9. If necessary, click **Restore** to return to the previously stored information.
10. Click **Update** to save your changes.

5.6 Define External Table Mapping

Use this page to join external tables to destination tables in Oracle Incentive Compensation.

Steps

1. Click the Administration tab and click the Incentive Subtab.
2. Click **External Table** on the side panel menu.
The External Table Join Conditions page appears.
3. If the list is long, you can search for a join condition by entering a search string in the Name field at the top and clicking **Apply**. *Note: This search is case sensitive.*
4. Enter a name for the condition in the Name column. This is a required field.
5. In the Usage column, select Collection or Calculation from the drop-down list. This is a required field.
6. Enter the source table. You can click **Go** to open a pop-up list. Click your selection to enter it into the field.
7. The Alias is system generated.
8. Enter a name of the destination table in Oracle Incentive Compensation. Click **Go** to open a pop-up list from which to make a selection.
9. Click **Columns** in the External Columns column to another page where you can specify source and destination columns.
10. If you want to remove a line, check the Remove check box and the line will be deleted the next time Update is clicked.
11. If necessary, click **Restore** to return to the previously saved information.
12. Click **Update** to save your changes.

5.7 Define Calculation Expressions

Calculation expressions are interchangeable, reusable parts that are used in input and output expressions of formulas, expression-based rate dimensions, and performance measures.

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.

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 one calculation expression within another.

As part of the definition process you can select columns from a list of table columns on the Expressions subtab of the Incentive tab to create expressions. Once they have

been saved the expressions 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 pages for performance measure, input and output.

You can place a formula inside a calculation expression if you want to be certain that the expression is used after that formula. Sequencing plan elements in a compensation plan can also assure that calculations are performed in the order you need.

A performance measure can be an accumulation of transaction values that are captured by the plan element to which it is assigned. 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 can select and define the columns where revenue information for transactions is held. As transactions are entered and collected for the assigned plan element, the transaction values are accumulated. An example performance measure is:

TRANSACTION_AMOUNT

Input formulas tell Oracle Incentive 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 Oracle Incentive Compensation. An example input formula expression looks like this:

$(\text{TRANSACTION_AMOUNT} * \text{EVENT_FACTOR}) / \text{TARGET}$

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 established rate table tiers. If a transaction is collected in Oracle Incentive Compensation with the following attributes:

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

Oracle Incentive Compensation, using the input expression created matches the above transaction of \$100 with the rate table and determines that 4% will be paid on this order.

Outputs of the formula instruct the application 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 tell Oracle Incentive Compensation in which columns this information resides and then 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 \times 4\% \times 1.05 = \4.20).

Use the following procedure to define calculation expressions.

Prerequisites

Table and column mapping is complete.

Steps

1. Click the Incentive tab and click the Expression subtab.

The Calculation Expressions page displays a list of already created calculation expressions.

2. To create a new calculation expression, click **Create**.

The Calculation Expressions page with blank fields appears.

3. Enter a unique name for the expression. This is a required field.
4. Optionally, provide a description for the expression.
5. Select a Type from the drop-down list. The seven selections represent groups of calculation elements, such as expressions, formulas, and SQL functions. Only the calculation elements in that selection are displayed in the Calculation Values box.
6. From the Calculation Values box, select the column to be used in the expression.
7. Click the right arrow button to move the element in the Calculation Values box into the Expression box.

If you change your mind, you can click the left-arrow button to remove an entry from the Expression box.

8. If your expression requires it, select an operand from the row below the Expression box. It appears immediately in the Expression box without using the right arrow button.

Again, to remove an item from the Expression box, click the left arrow button.

9. Optionally, numeric constants or string values can be added to an expression. Enter the numeric value or string value desired and click the right arrow button to move it to the Expression box. As above, click the left arrow button to remove an entry from the Expression box.
10. Add elements and operands until the desired expression has been created.
11. Optionally, click **Restore** to return to the previously saved information.
12. Click **Update** to save and compile your expression.

The status of the expression should read Valid if it has compiled properly.

13. 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 Bonus calculation expression cannot include an element from the table `cn_srp_period_quotas` or any table that is mapped to this table. A Bonus calculation expression cannot be used as an embedded formula and cannot be mixed with a commission type formula. See [Formula Bonus](#) for more information.

User table names are listed under External Elements. You join an external table to an internal table by mapping them using Administration > External Tables.

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

The following Oracle Incentive 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_QUOTAS

A rate dimension calculation expression can only be defined from the following tables:

- CN_SRP_PERIOD_QUOTAS
- CN_SRP_PAN_ASSIGNS
- CN_SRP_QUOTA_ASSIGNS
- CN_SALESREPS

5.8 Define Rate Dimensions

Rate dimensions define the tiers that are used in a rate table.

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

Note: This version of Oracle Incentive 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 are assigned to roles that are assigned 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.

License Revenue	State	Product	Rate
0-100	Arizona	PCs	1%
0-100	Arizona	Peripherals	5%
0-100	California	PCs	1.5%

License Revenue	State	Product	Rate
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. Click the Incentive tab and click the Rate subtab.
The Rate Tables page appears.
2. Click the name of the rate table for which you want to create or edit a dimension.
The Rate Table Details page appears.
3. In the Dimension area, click **Details** next to any already created dimensions to open the Dimensions page. It contains the rate tiers assigned to the dimension.
4. To create a new dimension, click **Create**.
The Dimension page opens. The fields are blank.
5. On the Dimensions page, for a new dimension, enter a name in the Name field. If you are editing an existing dimension, be sure the field contains the name of the dimension on which you want to work.
6. Select or verify the type from the drop-down list.
7. Optionally, enter a description.

8. In the Rate Tiers area, enter numbers in the From and To columns to create rate tiers. Follow the sequence, and do not leave any gaps between the tiers.
9. If you want to add a tier, use the blank fields at the bottom of the table.
10. To delete a tier, click the Remove check box next to the tier and click **Update**.
11. If necessary, click **Restore** to return to the previously saved information.
12. Click **Update** to save your work.
13. Click **Back** to return to the Rate Table Details menu, where you can assign the dimension you created to the rate table.

Guidelines

If the application is unable to find a match in a string dimension in a rate table, the application picks 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 occur, and the rate table result is 9.25%, the last value in the Rate column.

If you do not 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. You can correct these failed transactions' attributes by changing their values and maintain a record of the adjustment through the manual adjustments window.

5.9 Define 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. Perform the following procedure to define rate tables.

Prerequisites

Rate dimensions must already be created.

Steps

1. Click the Incentive tab and click the Rate subtab.

The Rate Tables page appears

2. Click **Create**.

The Rate Table Details page appears.

3. Enter a name for the rate table.
4. Select a rate table type, either Amount or Percent, from the drop-down list.
5. In the Dimensions area below, assign rate dimensions to the rate table.
6. Click **Go** in the Dimension Name to open a pop-up window from which you can search for dimensions.
7. Click a dimension to add it to your list. The Number of Tiers and Type fields populate automatically.
8. After you have assigned your dimensions, use the drop-down list in the Sequence column to place the dimensions in the order that you want them.
9. After you have assigned the first dimension to the rate table, the Assign Commission Rates link at the top of the Rate Details page becomes active. After you have assigned all of the rate dimensions to the rate table and clicked **Update**, click the link to go to the Commission Rates page.
10. On the Assign Commission Rates page, assign commission rates to the rate table dimensions.
11. If necessary, click **Restore** to return the information to the previously saved version.
12. Click **Update** to save your work.

5.10 Define Formulas

You have complete flexibility to create formulas for calculating compensation. Some formulas can be used in another formula definition or in a plan element definition. You can save an incomplete formula and return to complete it later.

If you wish to incorporate calculation expressions into your formula, then these expressions must be created before you reach this stage. Calculation expressions can be repeated in your formula and can also be reused in other formulas as well. Please see the Guidelines section of [Define 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 [Define Calculation Expressions](#).)

Use the following procedure to create formulas.

Prerequisites

Rate tables must be created first (See [Define Rate Tables](#).)

Steps

1. Click the Incentive tab and click the Formula subtab.
The Formulas page appears.
2. Click **Create** to create a new formula.
The Formula Definition page appears.
3. Enter a unique name and a description for your formula.
4. Enter Commission or Bonus from the drop-down list in the Type field. (See Guidelines)
5. Select Individually or Group from the Apply Transactions drop-down list. (See Guidelines)
6. Make a selection from the Split drop-down list. (See Guidelines)
7. Check the Accumulative check box if you want to aggregate the transactions. (See Guidelines).
8. Check the Interval To Date check box if you want to base the calculation on a period different from the plan element interval. (See Guidelines)
9. Check the Planning check box if this formula is used for plan modeling purposes.
10. Click **Update** to save your work. If you are making changes to a previously saved formula, you can click **Restore** to return to the previously saved version.
11. Click the Expressions link at the top of the page to go to the Assign Expressions page.
The Expressions page appears.
12. In the Input area, select an expression from the drop-down list to represent your formula input. You can use more than one input expression, but the number of

input expressions must equal the number of dimensions in the rate table that you select later.

13. Assign a forecast, if desired.
14. Click the eraser icon in the Remove column to delete an expression from the formula.
15. In the Output area, select an expression from the drop-down list.
16. As with the input expression, you can select a forecast from the drop-down list.
17. In the Performance Measure area, select expression from the drop-down list. The performance measure, as well as the quota, is used in reports for comparison with achievement.
18. Click **Update** to save your work. If you saved the expression before, you can click **Restore** to return to the previously saved version.
19. Click the Rate Tables link to assign a rate table to the formula.
The Rate Tables page appears.
20. Click **Go** in the first blank field in the Name column to open a pop-up box. Select a rate table and click it.
21. Enter an effective start date and end date. You can view the rate table details and rates by clicking **Rate Table Details**.
22. Return to the Incentive > Formula > General and click **Generate**. If you have successfully created the formula, the status field above the Generate button will change from Incomplete to Complete.
23. Click **Update** to save.

Guidelines

A Bonus Formula is a type of Formula where there are no links or references to transactions. See the Guidelines section of [Define Calculation Expressions](#) for more information. Also see [Formula Bonus](#).

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 select No Split in the drop-down list, 2% is applied to the whole transaction amount of 1500. If you select Non-Proportional in the drop-down list, 1% is applied to 1000 and 2% is applied to 500.

The Proportional selection in the Split drop-down list is intended for use with amount rate tables. For 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 pays 80, and half of the second tier $[(1300-800)/(2000-1000)]$ pays 100 (half of the rate 200). Total commission for the second transaction is 180.

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

Use interval-to-date quotas and fixed amounts if:

- Calculation is to occur before the end of the plan element interval (for example, if the interval is quarter and calculation occurs monthly)
- Quotas are set cumulatively within the interval
- Performance to date is to be compared to the quota to date

Dependency Notes

Formula Commission

1. Individual Option for Transactions can be used with any Accumulate/Interval to Date option.
 - c. By default Interval to Date and Accumulate options must be used together. You cannot select Interval to Date by itself. Split options are selectable (each is mutually exclusive).
 - d. 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

5.11 Associate Responsibilities with Responsibility Groups

Any responsibility that is created for use in Planning needs to be put in a responsibility group. This can be done by setting the OSC: SFP Responsibility Group profile for the responsibility. Permissible responsibility groups are:

- Super User
- Finance Manager'
- Contract Approver
- Sales Manager

The data access privileges of a responsibility are determined by the responsibility group it is put in.

Prerequisites

System Administrator responsibility is required.

5.12 Default Contract Text

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

Prerequisites

Super User responsibility is required.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Settings** in the side panel Menu.
The Settings page appears.
3. Select a Transaction calendar from the drop-down list. You can choose from Five Day Week or a Six Day Week.
4. Enter the title of the contract in the Contract Title field.
5. Enter the Eligibility Rules in the Club Qualification text box.
6. Enter the Terms & Conditions of the Compensation Plan.

7. Enter the Approver's details in the Approver section.
8. If necessary, click **Restore** to retrieve the last saved set of information.
9. Click **Update** to save your work.

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

5.13 Define User Access

Use the User Summary page to select a User. After that, enter specific information on the User Access Detail page to make alterations to the selected User's access privileges.

Prerequisites

Users must be assigned Finance Manager responsibility to appear on the User Access screen.

Steps

1. On the Administration tab, click **Incentive**.
2. Click **User Access** on the side panel menu.
The User Access page opens.
3. Select a User by clicking on the name.
The User Access Details page opens.
4. On the User Access Details page, enter a compensation group in the Compensation Group column, or click **Go** to select one from the pop-up menu.
5. In the Organization column, select an organization from the drop-down list.
6. Select an access level of Update or View from the drop-down list.
7. If necessary, click **Restore** to return to the most recently saved information

8. Click **Update** to save your changes.

5.14 Define Quota Components

Use this page 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. Click the Administration tab and click the Incentive subtab.
2. In the side panel menu, click Component.
The Quota Components page appears.
3. Enter the name of the Component in the first blank field in the Name column.
4. Enter a short description for each component.
5. Select a component type from the Type drop-down list. This is a required field.
6. Select Unit or Revenue from the Unit column drop-down list.
7. Check the Compute Flag check box if the value of the component is to be derived from a formula.
8. Click **Update** to save your work. If necessary, click **Restore** to return to the previously stored information.
9. If you want to delete a component, check the Remove check box and click **Update**.

Guidelines

For example, the Component names can be 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.

In the Unit column, select how the quota is measured, by units or by revenue amount.

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.

5.14.1 Edit Computed Component Formula

Use this page 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.

5.15 Define 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

Super User responsibility required.

Steps

1. Click the Administration tab and the Incentive subtab.
2. Click **Attainment** in the side panel menu.
The Attainment Schedule Summary page appears.
3. Enter the name of the attainment schedule you want to create in the blank field in the Attain Schedule Name column.
4. Click **Update**.
5. Click the new name from the Attainment Schedule Summary.
The Define Attainment Schedule page opens.
6. 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.
7. Repeat step 6 until your attainment schedule is complete.
8. Click **Update** to save.

Guidelines

To delete an attainment schedule, check 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.

5.16 Define Roles

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

Use the following procedure to define the details of a sales role.

Prerequisites

Sales Roles must already be created in Oracle Resource Manager. Rate tables, components, and attainment schedules must be created first in Oracle Incentive Compensation.

Steps

1. Click the Incentive tab.
The Agreements page appears. It is the first page of the Agreement subtab.
2. Select a sales role name. Use the search parameter at the top of the page to search if needed. Enter all or part of the sales role name before the percent sign and click **Go** to use the search parameter. Click the sales role to go to the Sales Role Detail page.
3. If desired, copy the fields from an existing role by selecting a role from the drop-down list. Click **Apply**.
4. In the On Target Earning field, enter Total Earnings if the Salesperson assigned this role achieves 100% of quota.
5. Check the Club Eligible check box if this role is entitled to Club participation on achieving Club rules.
6. Use the Rounding Factor field if you want to round the assigned quota. For example, input 1000 if assigned quota is to be rounded up to the nearest 1000.
7. In the Quota Minimum and Quota Maximum fields, enter the range of quota figures that this role should have.
8. Input the Compensation Plan Level to indicate the position of the role in the sales hierarchy. For example, a street level salesperson will be assigned to Level 1.
9. Select an Attainment Schedule from the drop-down list that is applicable to the compensation plan for this role.
10. Select Fixed Pay Components and then enter numbers against each component to indicate the sequence that it is to appear in the Assign Quota and My Quota Estimate windows. Enter the fixed pay amount for each fixed component. (For example: if the fixed salary of a salesperson is 50,000, then enter 50,000 against the fixed salary component).
11. Select Variable Pay, Non Computed Components as in step 10:
 - a. Enter the name of the component. Click **Go** to open a pop-up list.

- b. Enter the sequential order of display in the Sequence column.
 - c. In the % of Total Quota column, enter the percentage of the quota that you want this component to represent in the compensation plan. *This must be entered for the Distribute Quota function to work.*
 - d. Enter the amount of commission at 100% of attainment.
 - e. Select a seasonality schedule. Click **Go** to open a pop-up list from which to make your selection. The default seasonality schedule is even.
 - f. Select a calculation formula by clicking **Go** and selecting it from the pop-up list.
 - g. Select a rate table from the drop-down list.
 - h. Select a rate calculation method:
 - Anchors - These must be defined separately. If Anchors is selected, the Define link appears in the Anchors column.
 - Manual - Uses the predefined rate table.
 - Single Tier - All transactions are compensated at the same rate.
12. Select Variable Pay Computed Components and enter the sequential order of display. The selections are the same as the Non Computed Components in step 9, except that seasonality is not used but formulas are.
13. Select Variable Pay Non Quota Components. Click **Go** to open a pop-up list. Then, perform the following:
- a. Enter the sequential order of display.
 - b. Enter the calculation formula. Click **Go** to open a pop-up list from which to make your selection.
 - c. Select a rate table from the drop-down list.
14. The sections for variable components in steps 9, 10, and 11 also contain fields for selecting a Calculation Formula and Rate Table. Enter information into these fields to enable calculation for these variable components.
- a. Components with quotas additionally include an anchor column and a Disable Anchors check box.
 - b. Click **Define** in the Anchors column to go to the Agreement Details page.
 - c. Use anchors to indicate the maximum that can be earned at each tier of the rate table you selected.

15. Enter the name of the compensation plan in the Map to Compensation Plan field if you want the element to appear in that compensation plan after 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.

5.17 Agreement Details

Use this page 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. On the Sales Role Detail page, in the Variable Pay, Computed Components area, click **Define** in the Anchors column.
The Agreement Details page appears.
1. Select a calculation method, Line or Step, from the Anchor Rate Calculation Method drop-down list (See Guidelines).
2. In the Rate Range area, enter the Minimum Rate and Maximum Rate for each tier of the Rate Table (optional).
3. In the Multi-Tier Rate Table Anchors area, enter the Percent of Attainment in the first column. This is displayed based on the rate dimension definition. You can change only the first and last values in this column (See Guidelines).

4. In the drop-down list of the Anchor Type column, select the method of commission calculation to be used. Choose Amount if you are entering the commission earnings amount for each attainment/achievement level. If the percentage of quota is to be used, select Percent in the Anchor Type column and enter the percentage of quota for each attainment level. See Guidelines for more explanation.
5. Click **Update** to save new information.
6. If necessary, click **Restore** to retrieve the last saved set of information.

Guidelines

There are two methods of Anchor Rate calculation, Line and Step. These methods are used to fill in the Commission rates for the rate tables created in the Administration part of Oracle Incentive Compensation.

Step calculation simply uses the amounts in the anchor (expected commission column), with no calculation. When attainment reaches the percent in the tier, the commission amount shown in the tier is paid. The Line method calculates commission on a sliding scale, with commission depending on the exact rate in each separate tier of the rate table, calculated on a sliding scale.

Here is an example of how Line and Step calculation works:

Step 1. Create a rate dimension in the administration part of Oracle Incentive Compensation:

- 0 - 25%
- 25% - 50%
- 50% - 75%
- 75% - 100%
- 100% - 999%

Step 2. Assign the rate dimension to a rate table. Here the dimension type is percent and the rate type is amount:

From	To	Expected Commission
0	25%	To be calculated
25%	50%	To be calculated
50%	75%	To be calculated

From	To	Expected Commission
75%	100%	To be calculated
100%	999%	To be calculated

Step 3. Assign this rate table to a component in Incentive Planning and define the anchors as follows:

% of Attainment	Type	Expected Commission
0%	Amount	0
25%	Amount	100,000
50%	Amount	150,000
75%	Amount	180,000
100%	Amount	200,000
999%	Amount	200,000

Step 4. If the anchor method calculation is Step calculation, the commission rates for the rate table are:

From	To	Commission Rate
0	25%	0
25%	50%	100,000
50%	75%	150,000
75%	100%	180,000
100%	999%	200,000

Step 5. If the anchor calculation method is Line calculation, commission rates for the rate table will be calculated as follows (TQ = 20,000 total quota):

1st Tier (1 - 25%)

$$100,000 - 0 / (25\% - 0\%) \text{ TQ}$$

$$100,000 / 25\% * 20,000 = 20$$

2nd Tier (25% - 50%)

(150,000 - 100,000)/50% - 25% TQ

50,000/25%*TQ = 10

3rd Tier (50% - 75%)

(180,000 - 150,000)/(75% - 50%) TQ

30,000/25% *TQ = 6

4th Tier (75% - 100%)

(200,000 - 180,000)/(100% - 75%) TQ

20,000/25% *TQ = 4

5th Tier (100% - 999%)

(200,000 - 200,000)/(999% - 100%) TQ = 0

Note: Real data will be set up so that the commission rates increase from tier to tier.

Step calculation can be used only for rate type of amount.

Anchors are used only to calculate the commission rates for the rate table. After activation from Incentive Planning to Administration, these rates can be seen in Resource > Resources, which are customized rates for the specific salesperson.

If the step calculation method is used in Incentive Planning, the rate table in step 4 will be used to calculation commission. If the line calculation method is used, then the rate table in step 5 will be used to calculation commission.

In step 3 above, if the rate dimension for a rate table is defined as:

0 - 25%

20 - 50%

50 - 100%

then when this rate table is assigned to a compensation plan in Incentive Planning, the multi-tier rate table percent of attainment column is displayed as:

0%

25%

50%

100%

You can change only the 0% and 100% values.

5.18 Define Jobs

Job titles are used by Human Resources to categorize employees. Oracle Incentive Compensation uses roles, and a job title can be assigned to a particular role by using the Job Titles page.

Perform the following procedure to assign roles in Oracle Incentive Compensation to Job Titles.

Prerequisites

Super User responsibility is required. Resources must be set up in Oracle Resource Manager.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Job Titles** in the side panel menu.

The Job Titles page appears.

3. Select a Job Title by clicking its name. You can use the search parameters at the top of the page to search for a job title by name or by job code. Click **Go** to display the search results.

The Resource Details - Job Titles page appears. The page displays any roles that are already assigned to the job title.

4. To add a role, enter it in the Role column. You can click **Go** to open a pop-up window listing roles from which to select.
5. Enter a start date and end date. Click the calendar icon to open a pop-up calendar. A start date is mandatory; the end date is optional.
6. Click **Update** to save your work. If you are editing a role assignment, you can click **Restore** to return to the previously saved version.

Guidelines

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

5.19 Associate Jobs with Roles

This procedure is done in Resource Manager. See Resource Manager information in Oracle Incentive Compensation Implementation material (before step 1).

5.20 Define Resource Groups (Compensation Groups)

See step 5-42.

5.21 Define Resources

See step 5-43.

5.22 Assign Resources to Roles and Groups

See step 5-44.

5.23 Assign Roles to Job Titles

Job titles that are to be used in Planning need to be assigned to a role for a given date range.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. In the side panel menu, click **Job Titles**.
3. On the Job Titles page, search for a job title.
4. On the search results page, select a role for the job title and associate it over a date range.

5.24 Assign Job Titles to Salespeople

This procedure is performed in Resource Manager. See Resource Manager information in Oracle Incentive Compensation Implementation material (before step 1).

5.25 Customize On Target Earnings and Anchors

On Target Earnings and Anchors are part of the definition of a role. They can also be customized for individual salespeople. On the On Target Earnings page, you can view fixed and variable compensation plan elements for a resource, based on their compensation plan.

Prerequisites

The sales role must already be created in Resource Manager. The sales role details must already be created in the Agreement subtab of the Incentive tab. Rate tables must be created. Rate tables must also be assigned to the component to which you want to apply anchor values.

Steps

1. Click the Resource tab and click the Planning subtab.
2. Use the Resource Search page to search for a resource.
The Resource Search Results page appears.
3. Click the name of the resource you need.
The Resource Details - Main page appears.
4. Click the amount in the On Target Earnings column.
The On Target Earnings page appears.
5. Enter revised amounts in the fields for the Fixed and Variable Amount fields.
6. To customize anchors, click **Define** in the Anchors column in the Variable, Quota Based area.
The Resource Details - Customized Anchors page appears.
7. In the Rate Schedule Detail section, enter the commission rate range for each tier of the Rate Table.
8. 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.
9. If you are editing previously created information, you can click **Restore** to retrieve the last saved set of information.
10. Click **Update** to save your work.

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

5.26 Assign and Distribute Quotas to Salespeople

5.26.1 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. For example, when sales managers click the distribute button, their directs will receive an email that prompts them to view and accept their compensation plan.

Prerequisites

None.

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 Hidden panel. Transfer Compensation Plan Processing to the panel called Visible by clicking the Visible button. Click 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 the Body tab.
6. Edit the standard text message to suit user requirements.
7. Click 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 letters and preceded by &. You should edit message text around these Attributes and not to edit the Attributes themselves.

5.26.2 Workflow Background Process

The 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 must 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.

5.26.3 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 to do this.

5.27 Salespeople Accept Plans using Oracle Sales Online

Salespeople can log on to Oracle Sales Online and accept their Compensation Plans. To do this, perform the following procedure:

Steps

1. Log onto Oracle Sales Online.
2. Click the Compensation tab and click the Compensation Plan subtab.
3. Click the plan to be accepted.
4. Click the Accept button on the plan (contract).

5.28 Activate Pay Periods

To activate a pay period, perform the following procedure:

Prerequisites

Pay periods must be defined in Oracle Incentive Compensation.

Steps

1. Click the Administration tab, and click the Incentive subtab.
2. Select Pay Periods in the side panel menu.
3. Select a calendar from the list of values. Click **Apply**.

4. Activate a pay period by selecting Active from the list of values (LOV) in the Period Status column.
5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your changes.

5.29 Define Pay Groups

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

Prerequisites

Calendars must be defined in GL and pay periods must be activated in Oracle Incentive Compensation.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Paygroup from the side panel menu.
The Pay Groups page appears.
3. Assign a unique name to the pay group. This field is required.
4. Optionally, enter a description.
5. Select an effective start date and end date for the pay group. Click the calendar icon to open a calendar. These fields are required.
6. Select a calendar. Click **Go** to open a pop-up box from which to make a selection.
7. Select a period type from the list of period types that were defined for the selected calendar. Click **Go** to open a pop-up box.
8. If necessary, click **Restore** to return to the previously stored information.
9. Click **Update** to save the pay group.

Guidelines

The period type defines the frequency of payments for the pay group. Even if a period type, such as quarter or year, is displayed in the pop-up box, it must be activated in Oracle Incentive Compensation before it can be used.

Note: In this release of Oracle Incentive Compensation, the period type must be set to Month for values to roll over to the next year in Year to Date reports.

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.

5.30 Set Up Collection Mapping

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

Navigation Path

Administration > Incentive > Collection > Mapping

When you move to the Mapping page for the first time after creating a new Transaction Source, you will see that the Source/Destination list has been prepopulated 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 Incentive 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 prepopulated 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 cannot 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.

5.30.1 Direct Mappings

Direct Mappings are those in which 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, and 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 shown in the table in 5.12 refer either to no table data at all, or only to columns from one of the 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 click 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. Enter **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. Enter , 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.

5.30.2 Indirect Mappings

Indirect Mappings 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 mapping is performed: the Free-Form Indirect Mapping and the Relationship Indirect Mapping.

With a Free-Form mapping you must manually enter the exact FROM/WHERE clause 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.

For example, if you want 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 to store the Salesrep_Id from L_SALES_CREDITS. To set up the direct mapping, perform the following steps:

Steps

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, such as Attribute99, from the LOV. Do *not* use the Salesrep_ID destination column: the reason is explained later in *Mapping the Employee Number*.

To set up a Free-Form Indirect Mapping for Territory, perform the following steps:

Steps

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: If you use Source Builder to do this, the Table Name LOV will list all of the tables that are currently registered in Oracle Incentive 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, to set up a Relationship Indirect Mapping for Territory, perform the following steps:

Steps

1. Use the External Tables page (Administration > Incentive > External Tables) 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 page of the Collections subtab (Administration > Incentive > Collections > Transaction Source > Mapping). 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 automatically populated.
4. Enter **lte.territory_name** in the Source field.

Note: 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 exactly how your Indirect Mapping will be physically implemented.

When should you use a Free-Form Indirect mapping and when should you use a Relationship mapping?

The Relationship Mapping is more restrictive than the Free-Form version. On the External Tables form you can define simple equivalence joins only 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.

Therefore, Free-Form mapping is the one to choose.

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

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

A problem arises when importing transactions from a legacy system if the salesperson identifier on the legacy record does not match the Salesrep_ID that was allocated to the salesperson when they were registered in Oracle Incentive Compensation. The Resource Manager Salesrep_ID is an internal key that is not visible to the user and cannot be updated.

To create a link between legacy salespeople and Oracle Incentive Compensation salespeople, perform the following steps.

Steps

1. When you create a new Resource is created in Oracle Incentive Compensation, you must fill in the Resource Number field. In this field, record the user-visible unique identifier that this person has in the legacy system.
2. On the Mappings tab, set the Source of the mandatory Employee_Number mapping to be the person identifier column from your legacy system.

When records are subsequently imported from CN_COMM_LINES_API into Oracle Incentive 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.

5.30.3 Source Tables

This page is used to specify all the tables which are used during the creation of compensation transactions--the Direct Mapping tables. For the Resource Posting and Order Booking selections, all the transaction source data is predefined and cannot be deleted or modified. To define source tables for sources that allow definitions, perform the following procedure:

Prerequisites

Tables must be registered in the Tables subtab.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** in the side panel menu.
3. Click the Source Tables link.

The Collection - Source Tables page appears.

4. Select a transaction source from the drop-down list.
5. Click **Apply**.

The Type and Status fields populate, and any tables that are already defined populate in the fields below.

6. If a field can be changed, enter a table name, or click **Go** to open a pop-up list. Click your selection to enter it into the field.

Guidelines

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 also 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.

Optionally, you can specify a header table in the Header Table area. If you specify a Header Table, also specify a key column for it and in the Line Table Header Identifier field specify the field in the line record (foreign key) which allows it to be joined to the Key Column field of the Header Table.

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

5.30.4 Queries

On this page 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.

The Queries page is divided into two areas: Notification Query and Collection Query. The Notification Query area shows the exact query which will be used to create the Notification list of line-level transactions which are eligible for compensation. The Parameter subsection of the Notification Query area allows you to narrow your focus, for example, by start date and end date.

The second part is the Collection Query. The Collection Query area lists the exact tables and rows from those tables that you need to perform a collection.

To change or enter new parameters in the Notification Query area, perform the following procedure:

Steps

1. Click the Administration tab and click the Incentive subtab.

2. Click **Collection** on the side panel menu.
3. Click the Queries link.
The Collection - Queries page appears.
4. Enter the name of the parameter in the field.
5. Click **Update**.
The Type field populates.
6. While entering data, click the eraser icon to clear the field. If you want to return to the previously stored information, click **Restore**.

Guidelines

This Notification query joins together the mandatory Line table (L_ORDER_LINES) and the optional Header table (L_ORDER_HEADERS). You must specify a header table, even though the purpose of the notification query 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 page (*Setup -> Collection Parameters* menu option). A separate page is used because for any changes made on the Collections page to take effect, it is necessary to regenerate the collections package, whereas the parameter values can be changed without needing to regenerate.

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 page 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.

5.30.5 Actions

The Actions page allows you to change the Collection processing for the transaction source in two ways--the addition of User Code Blocks and the specification of Transaction Filters. User code blocks are PL/SQL statements that you can insert at certain points in the collection procedure. Transaction filters are especially relevant to Receivables and Order Management, because you cannot change the collection query for those standard transaction sources. Filters allow you to define criteria for unwanted transactions (See Guidelines).

To create a User Code Block, perform the following procedure.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collections** on the side panel menu.
3. Click the Actions link.

The Collections Setup - Actions page appears.

4. Select a location for the user code block from the Location drop-down list. Choices include:
 - Pre-Notification: at the beginning of the procedure
 - Post-Notification: between running the Notification and Collection queries
 - Post-Collection: after the Collection query has been run
5. Enter the code in the Code field.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your changes.

To create a filter, perform the following procedure:

1. Select the method of filtering by clicking one of two buttons:

- **Mark as Filtered:** The transaction will appear in CN_COMM_LINES_API but be marked as filtered.
 - **Physically Delete:** The transaction will be deleted from CN_COMM_LINES_API.
2. Enter the text of the action you want in the Filters area of the page.
 3. If necessary, click **Restore** to return to the previously saved information.
 4. Click **Update** to save your work.

Guidelines

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 blocks at three locations:

- At the beginning of the procedure
- Between running the Notification and Collection queries
- After the Collection query has been run

Because you cannot access the Queries page 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 page 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 than \$100 (assuming that all your sales are in dollars). You can specify this on the Actions page simply by entering the text *api.transaction_amount < 100* on a line in the Filters area.

You can also decide which method of filtering should be carried out for your transaction source, using the 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 Incentive Compensation.

5.30.6 Setting Up Collections

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

As a data collector, Oracle Incentive Compensation collects data from Oracle Receivables, Oracle Quoting - Forms, or other data sources and prepares that data to be transferred to the Oracle Incentive Compensation calculation processes.

To collect transaction data, specify the transfer batch size on the System Parameters page. A typical collection batch size is 2000 transactions, depending on your system.

5.30.7 Setting Up A New Transaction Source

Use this page to set up from which source you want to get the data for processing your transactions, and also to determine which Receivables events you want to generate the transactions. In the Transaction Source area, perform the following procedure:

Prerequisites

Tables must be set up already in the transaction source.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** on the side panel menu.
The Collection - Transaction Sources page appears. It is the first of six Collections pages.
3. Enter the name of the transaction source in the first empty field in the Transaction Source column.
4. Enter a type, such as AR (Accounts Receivable), OC (Oracle Quoting - Forms), or an abbreviation for a legacy source.
5. Enter a Line Table name. Click **Go** to open a pop-up list from which to select a line table name. Click your selection to enter it into the field.
6. Select a Key Column for the table. Click **Go** to open a pop-up list.
7. To remove a transaction source, check the remove check box and the line will disappear after the next update.
8. If necessary, click **Restore** to return to the previously saved information.
9. Click **Update** to save your work.

The Receivables Event area displays which receivables events are set up to collect transaction data. To set these events to collect data, perform the following:

1. Check the check box in the Collect Column next to the event for which you want to collect.
2. Click **Update**.
3. If necessary, click **Restore** before clicking **Update** to return to the previously saved information.

Guidelines

The Status column tells you whether the collection package has been generated for the Transaction Source since the latest setup changes were made.

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.

5.30.8 Report Generate

When the collection setup is complete, you are nearly ready to generate your Collections package. However, since clicking the Generate button on the Generate page 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 Test Generate button on the Generate page enables you to test the validity of the new package.

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

After the setup is complete, use the Generate page to generate a test collections package. After it tests successfully, you can generate the final collections package from this page as well.

Prerequisites

Collections setup must be complete.

Steps

1. Click the Administration tab and click the Incentive subtab.

2. Click **Collection** on the side panel menu.

3. Click **Generate**.

The Collection - Generate page appears.

4. In the Summary area, click the button in the Select column next to the transaction source for which you want to run a test generation.

5. Click **Test Generate**.

A test version is generated.

6. If Error appears in the Test Status column, click it to open the details area below the Summary area.

The Error Text and entire Package text are displayed.

7. Fix the errors and rerun the test generation until you are satisfied with the result.

8. You can click **Yes** or **No** in the Collect Flag to return to the Transaction Sources page and verify it or change it.

9. If everything is correct, click **Generate** to generate the actual Collection package.

Guidelines

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 in a User code Block. It is easy to identify such problems during the test generation, go back and fix them, and then rerun the test generate.

Apart from finding compilation errors, the other main use of this function 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.

5.30.9 Running Collections

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

Prerequisites

Collections setup must be complete. Oracle Incentive Compensation must be registered in Oracle Capture (see Guidelines).

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** on the side panel menu.
3. Click **Generate**.

The Collection - Generate page appears.

4. In the Summary area, click the button in the Select column next to the transaction source for which you want to run a test generation.
5. Click **Generate** to generate the actual Collection package.

Guidelines

To register the application in Oracle Order Capture, perform the following steps.

1. In Forms, log on as the Order Capture Sales Manager responsibility.
2. Click QuickCode menu to go to the Oracle Order Capture Lookups form.
3. Query the lookup type ASO_ORDER_FEEDBACK_CRM_APPS.

If the lookup code "CN" does not exist, create a record as follows:

Lookup Code: CN

Meaning: Oracle Incentive Compensation

Description: Oracle Incentive Compensation

Enabled: <checked>

4. Save the changes.

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 are set up.

Remember that if you created any parameters on your Queries page, you do not set their values on the Concurrent Program run page. You have to use the Collection Parameters page 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 Incentive Compensation is to run the Transaction Interface Loader concurrent program, or to click the Load Transactions button on the Maintain Transactions page.

5.30.10 Setting Up A Standard Transaction Source

Oracle Incentive Compensation is delivered with two predefined Transaction Sources: Oracle Receivables and Oracle Quoting - Forms.

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 Oracle Receivables and Oracle Quoting - Forms 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 page.

Both of 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.

Prerequisites

Tables must exist in the transaction source and in the destination.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** in the side panel menu.
3. Click **Mapping**.

The Collection - Mapping page appears.

4. Enter a source expression in the Source Expression field.

5. Enter a destination. Click **Go** to open a pop-up list. In the Select box, enter search parameters and click **Go**. Select from the list.
6. If you want to perform indirect mapping, click **Indirect** to open the Indirect Mapping Details area at the bottom of the page.
7. In the Indirect Mapping Details area, enter a join relationship or click **Go** to select one from a pop-up list.
8. If necessary, click **Restore** to return to the previously saved information.
9. Click **Update** to save your work.

Guidelines

When you first display the Mappings page 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, click 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.

5.30.11 Use Filters

See *Filters* in 5.30.5, Actions.

5.30.12 Oracle Receivables and Oracle Quoting - Forms Special Features

5.30.12.1 Oracle Receivables

The predefined Receivables data source differs slightly from any other data source because it really represents four transaction sources that have been combined into one so that the sources 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
- Takebacks (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 click the **Generate** button for the receivables transaction source (Administration > Incentive > Collections > Generate), four packages are 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 of these events. It is therefore possible to restrict the generation to only those packages for the events that you require.

To select which packages to collect, perform the following procedure:

Steps

1. Click the **Administration** tab and click the **Incentive** subtab.
2. Click **Collection** in the side panel menu.
The **Collection - Transaction Sources** page appears.
3. In the **Receivables Event** area, check the check boxes in the **Collect** column for which you want to collect transactions.
4. Click **Update** to save your changes. Click **Restore** to return to the previously saved information.
5. Click **Generate** to open the **Collection - Generate** page.
6. Click **Generate**.

Guidelines

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

5.30.12.2 Oracle Quoting - Forms

Compared with Receivables, the Oracle Quoting - Forms 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 an end period. The parameter entry is supported by a list of values.

Although this transaction source collects from Oracle Quoting - Forms, the transactions actually originate in Oracle Order Management. Oracle Quoting - Forms acts as an interface. The transactions themselves are sales credits for orders that have reached the Booked status in Order Management.

5.30.13 Oracle Quoting - Forms

See above.

5.30.14 Adjustments

Order information 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:

- Scenario 1: The compensation transactions have been collected but have not been loaded into Oracle Incentive Compensation.
- Scenario 2: The compensation transactions have been collected and also loaded into Oracle Incentive Compensation.

In the first scenario, 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 the second scenario, the transactions are already inside Oracle Incentive 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 a long time to complete. 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 called *Order Update Notification*.

The list of updates to Orders is maintained for Oracle Incentive Compensation by the Oracle Quoting - Forms application. However, this only occurs if you inform Oracle Quoting - Forms of this requirement. You must register Oracle Incentive Compensation with Oracle Quoting - Forms as follows:

1. Switch Responsibility to Oracle Quoting - Forms
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 Oracle Incentive 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 Oracle Quoting - Forms 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 the example legacy system. Also, those transactions are already imported into Oracle Incentive Compensation. Now, a change is made to one of the orders for that month. In the table below, the ID of the Order Header is 1001 and the ID of the Order Line is 1234. To notify Oracle Incentive 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 following 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`.

5.31 Set Up Expense/Liability Account Mapping

In this release of Oracle Incentive Compensation, information can be transferred and posted from Oracle Incentive Compensation to Oracle Payable. This function is used for outside suppliers and vendors, not for regular employees. Regular employees are paid using Oracle Payroll.

Expense and Liability Accounts can be assigned at three levels: plan element, revenue class, and classification. There is an interface table in Oracle Incentive 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 Incentive Compensation.

5.31.1 Account Generator

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

- REVENUE CLASS
- PLAN ELEMENT
- CLASSIFICATION

See Guidelines for more about the three levels. To set the level, perform the following procedure:

Steps

1. Click the Administration tab and click the Incentive subtab.
2. The system parameters page opens. It is the first selection on the side panel menu.
3. Scroll down to the Payment area.
4. Select the level of account generation from the Account Generation drop-down list.
5. Click **Update** to save your changes. If you are making changes to existing System Parameters, you can click **Restore** to return to the previously saved information.

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

Steps

1. Click the Administration tab and click the Incentive tab.
2. In the side panel menu, click Ruleset.
The Rulesets page appears.
3. Define the name of the ruleset
4. Enter a start date and an end date for the ruleset. Click the calendar icons to open pop-up calendars.
5. Select the type of Account Generator from the drop-down list.
6. Click Update to save your work.
7. Click Rules in the Rules column.
The Rules Hierarchy page appears.
8. Click the name of the rule to go to the Create Rules page.
9. On the Create Rules page, click Create Child.
10. Assign a name to the rule that you are about to define.
11. Click Go to choose a revenue class from the list of values.
12. On the Rule Attributes tab, choose a user column name from the list of values, choose the type of values form the drop-down list, and enter the value or values that apply.
13. Optionally, enter additional attributes for the rule.

Note: Every attribute is assumed to be linked to other attributes with AND. 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.
14. An additional value of Result1 appears in the first column and is added to the attribute list of values.
15. Continue to relate the remaining attributes. Use Result1 to relate a third attribute to the first two.
16. Save the rule.
The expression appears.
17. To add rules in the rules hierarchy, 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 are associated to the line item. The three levels are as follows:

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.

5.32 Set Up Plan Element to Oracle Payroll Pay Element Mapping

Use this page to map the plan elements in Oracle Incentive Compensation to the pay elements in Payroll. To add or change a record, perform the following procedure.

Prerequisites

Plan elements and pay elements must already be created.

Steps

If you want to make a change in mapping or dates to an existing line, perform the following procedure.

1. Click the Administration tab and click the Incentive subtab.
2. Click **Payroll** on the side panel menu.
The Payroll Mapping page appears.
3. Enter the changes. Click **Go** to open a pop-up list, or click the calendar icon to open a pop-up calendar.
4. Check the Remove check box if you want to eliminate the plan element to pay element mapping.

5. Click the Inactive Employees check box if you want to keep the mapping but not use it now.

Steps 2 and 3 are completed when you click **Update**.

6. You can click **Element Input** to go to the [Pay Element Input Values Mapping](#) page.
7. Click **Update**.
8. If necessary, click **Restore** before clicking **Update** to return to the previously stored information.

To enter a new mapping, perform the following procedure.

1. Enter a plan element in the first blank plan element field. Click **Go** to open a pop-up list.
2. Enter the pay element from Payroll that you want to use.
3. Enter a start date and an end date.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your mapping.

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 Oracle Incentive Compensation plan elements and Payroll pay elements, with the salesperson status indicated in the third column:

Plan Element (OIC)	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

5.32.1 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 Oracle Incentive Compensation that identifies which data columns in application tables map to the input value of a pay element. The following tables can be used to map Oracle Incentive 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 Oracle Incentive Compensation.

Prerequisites

Plan elements and pay elements must already be created.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Payroll** on the side panel menu.
The Payroll Mapping page appears.
3. Click the link in the Element Input column next to the plan element and pay element that you want to work on.
The Plan Element Input Value Mapping page appears.
4. Enter a table name in the first blank field in the Table Name column. Click **Go** to open a pop-up list.
5. Enter a column name in the Column Name column. Click **Go** if needed.
6. In a line that is not yet saved, you can click the eraser icon to clear the fields before entering new information.
7. To remove a saved line, check the check box in the Remove column.
8. If necessary, click **Restore** to return to previously saved information.
9. Click **Update** to save.

5.33 Map Classification Attributes and Collection Attributes

Use the Columns page to define the descriptive flexfields in CN_COMMISSION_HEADERS table. You can link a user Name for an attribute to the application's name for it. This process helps making the names easier to use because they specifically describe the attribute. For example, Sales Region is easier to remember and apply than Attribute 6.

Prerequisites

Incentive Compensation Super User responsibility is required.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Tables** in the side panel menu.

The Tables page appears.

3. In the schema search parameter field, enter CN% to query for Incentive Compensation tables.
4. Click **Update**.

The CN schemas are now listed.

5. In the Details to the far right, click **Columns**.
6. The Columns page appears.
7. In the View drop-down list, select which columns you want to view. Choices include Columns, Dimensions, Classification, and Primary Key.
8. Click **Apply**.
9. Use the search drop-down list to narrow find the column name you need.

For Columns or Dimensions, the following steps apply:

10. Enter the name of your choice in the User Name field. Make sure it is a name that is easy to understand and use.
11. The Data Type field indicates if the column contains alphanumeric material (VARCHAR2), numerical data (NUMBER), or a date (DATE).
12. Check the usage check box if you plan to use the column for calculation.
13. Check the Foreign Key check box if you plan to use the column as a foreign key to collect data from the table.

14. If necessary, click **Restore** to return to the previously stored information.
15. Click **Update** to save your changes.

5.34 Define Revenue Classes

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

Each revenue class represents a different type of sale for which an organization pays compensation. 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 plan element, assign the compensation plan to a role, and then assign the role to a salesperson. By assigning revenue classes, you specify the types of revenue for which each salesperson can earn compensation.

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.

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 Incentive 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 incentive compensation, paying compensation only for sales made in a salesperson's assigned set of industries.

For a specific example, a computer hardware company 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 the company, each product or service category is an Oracle Incentive Compensation revenue class.

Use the following procedure to define your revenue classes and build revenue class hierarchies.

Prerequisites

None.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Revenue Class from the side panel menu.
The Revenue Class page appears. The Revenue Class page displays all previously defined revenue classes.
3. To define a new revenue class, enter the name in the first blank Name field.
4. Optionally, enter a description. The description often is the same as the name.
5. Select a liability code and expense code if needed to integrate with Accounts Payable (optional).
6. To search for liability codes and expense codes, click **Go** to open a pop-up list. Use search parameters in the field to narrow your search.
7. If necessary, click **Restore** to return to the previously saved information.
8. Click **Update** to save your work.
A confirmation message displays across the top of the page when the save is successful.

5.35 Define Revenue Class 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 classified transaction is rolled up in the revenue class hierarchy to determine matches to any revenue class on the plan.

To assemble revenue classes into hierarchies, perform the following procedure.

Prerequisites

Revenue classes have been created.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Hierarchy in the side panel menu.
The Hierarchy Types page appears.
3. For a new hierarchy type, enter a name in the Name column. To access an already created hierarchy, click **Details**.
The Hierarchy page appears.
4. Enter the name of the new hierarchy in the Name field.
5. Click **Details** to enter or revise start and end dates to a hierarchy.
The Intervals page appears.
6. Enter the start and end dates for the hierarchy. Click the calendar icon to open a pop-up calendar.
7. If necessary, click **Restore** to return to the previously saved information.
8. Click **Update** to save your hierarchy.
9. Click **Details**.
The Hierarchies window opens. It displays the existing available root classes. The application provides a default root class called Base Node.
10. Enter one or more root class names.
When you select the root name, a plus sign next to the name 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.
11. Select the parent revenue class for which you want to add a child.
12. Click the Add Child button.
13. Enter a new child name in the Add Child field, or click **Go** to open a pop-up box with a listing of already created children.
14. Click **Update** to add the revenue class to the hierarchy.
The new revenue class appears in the hierarchy.
15. Repeat steps 10 to 14 to build your hierarchy.

16. If necessary, click **Restore** to return to the most recently saved information.
17. Click **Update** periodically as you go and at the end to save your work.

Guidelines

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

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

5.36 Define Classification Rulesets for Revenue Classification

A classification ruleset is used to classify sales transactions to determine the appropriate revenue class for the transaction. Then, 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.

Use the Rulesets page to create a classification ruleset and account generation. Name your rules after the revenue classes they describe. Rules do not require unique names.

Prerequisites

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

Steps

1. Click the Administration tab and the Incentive subtab.
2. Click Ruleset in the side panel menu.
The Rulesets page appears.
3. In the first blank field in the Ruleset Name column, enter the name of the ruleset.
4. Enter a start and end date of this ruleset. Click the calendar icons to open pop-up calendars.
5. Select the Ruleset Type of Revenue Classification from the drop-down list.
6. Click the Rules link in the Rules column of the row of your ruleset.

The Rules Hierarchy page appears.

7. Click the Rule Name link that you just created.

The Create Rules page appears.

8. Click **Create Child**.

The Rules window appears.

9. Assign a rule name to the rule that you are about to define.
10. Assign a revenue class name. Click **Go** to open a pop-up list.
11. Click **Update**.

12. Return to the Rules Hierarchy page. Click **Attributes** in the Rule Attributes column.

The Rule Attributes page appears.

13. In each of the three areas, click **Go** to open a pop-up window list and select an attribute.
14. For the Single Value attributes, enter a value in the Value field.
15. For Range Value attributes, enter a low value and a high value in the fields.
16. For Hierarchy values, enter a hierarchy and a value.
17. Each area has a Not Flag column. Check the check box in this field to turn off the attribute temporarily without removing it.
18. To get to the Build Expression page, Return to the Rules Hierarchy page. Click **Expressions** in the Rule Expression column. The Build Expression page appears.
19. If necessary, click **Restore** to return to the most recently saved information.
20. Click **Update** to save your attributes.
21. To add rules in the hierarchy of rules, click the rule on the Rules Hierarchy page and use the Create Rules page.
22. When you are done, return to the Rulesets page for every ruleset that has new or changed rules and check the Synchronize check box next to the changed ruleset. Click **Update**.

Guidelines

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

When you make changes to a ruleset, you must synchronize it. When you check the Synchronize check box and click **Update**, the application generates a PL/SQL script based on the revenue classes and revenue class rules and saves it in an internal table. You do not need to synchronize if you only rearranged the rules.

A hierarchy of rules can be defined for each ruleset.

Every rule must have at least one attribute.

You can build expressions on the rules using the Build Expression page.

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.

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

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.

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

5.37 Define Interval Types

Quota and payment targets are defined for a specific period of time. Intervals are used to accumulate achievements for a specific period of time. The accumulated achievements in turn determine the rate at which commission is calculated.

Commonly used intervals include period, quarter, and year. You must define these intervals using the Interval Types page before they can be selected during creation of plan elements.

The Interval Types page displays all intervals that have been created and enables creation of new intervals. To view or define an interval type, perform the following procedure.

Steps

To view details of an already created interval, perform the following procedure:

1. Click the Administration tab and click the Incentive subtab.
2. Select Interval Types from the side panel menu.
The Interval Types page appears.
3. Click the name of the interval in the Name column.
The Interval Numbers page displays.
4. The Interval Number column shows the interval number, based on the calendar and period type shown above.

To create a new interval type, perform the following procedure:

1. On the Interval Types page, click **Create**.
2. Enter a name and description for the new interval.
3. If needed, click **Restore** to return to the previously saved information.
4. Click **Update** to save your work.

Guidelines

The Interval Numbers page appears when you click an interval on the Interval Types page. It shows the interval numbers based on the parameters of your selected interval. Interval numbers must be unique for each period.

For example, for quarterly intervals:

JAN-01, FEB-01, MAR-01 are all numbered 2001001

APR-01, MAY-01, JUN-01 are all numbered 2001002, and so on.

For Monthly intervals:

JAN-01 is numbered 2001001

FEB-01 is numbered 2001002

MAR-01 is numbered 2001003, and so on.

Interval numbers are user definable.

5.38 Define Credit Types

Use this page to define all credit types to be used in Oracle Incentive Compensation. Credit types include Functional Currency, points, air miles, or any custom form of credit that you want. These definitions are optional, and nonmonetary credits must be converted to functional currency to be paid. Only nonmonetary credit types can be defined.

5.38.1 View, Change, or Remove a Credit Type

To view, change, or remove a credit type, perform the following procedure.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Credit Type from the side panel menu.

The Credit Types page appears.

3. Optionally, use the search parameters at the top of the page. Enter a name or description ahead of the percent sign and click **Apply**.
4. Change the values in the Precision and Extended Precision fields as needed.
Precision defines the number of decimal places in which the credit type can be expressed.
5. If desired, check the Remove check box next to a credit type to remove it from the listing when the next Update is performed.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your changes.

5.38.2 Add a New Credit Type

To add a new credit type, perform the following procedure.

Steps

1. Enter a name for your credit type into the Name column in the topmost empty row.
Click the eraser icon to erase any mistakes in the current row as you work.
2. Enter precision and extended precision information.
3. Check the functional currency check box if you want the new credit type to be used as the functional currency.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your work.

5.39 Define Plan Elements

A **plan element** is part of a compensation plan. It specifies the conditions a salesperson must meet to be eligible for compensation, and it determines how the compensation is calculated. Use the following procedure to define plan elements.

Prerequisites

If the plan element includes a formula, then the formula must be created first. (See [Define Formulas](#).)

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

If the plan element includes a revenue class, then the revenue class must be defined first. (See [Define Revenue Classes](#).)

Steps

1. Click the Incentive tab and click the Element subtab.
The Plan Elements page appears.
2. Navigate to the Plan Element Details page by performing one of the following.
 - To view or make changes to the plan element, click a plan element name in the Name column. The Plan Element Details page will contain the previously entered information.
 - To create a new plan element, click **Create**. The Plan Element Details page will be blank.

3. Enter or verify information in the Name, Description, Start Date and End Date fields in the top area of the page. Name and Start Date are required fields.
4. In the Parameters area, select an incentive type from the drop-down list. Selections include Commission and Bonus. See Guidelines.
5. Select an interval type from the drop-down list. An interval type is the regular period of time used for setting quotas and commission payments. See Guidelines.
6. Select a credit type from the drop-down list. The credit type is normally the functional currency, but it can be any type that you define in the application.
7. Select a formula type from the drop-down list. This is a required field. See Guidelines.
8. If you select a formula type of Formula, select a formula from the drop-down list in the Choose Formula field. See Guidelines.
9. Check the Eligible for Payee Assignment check box if you want the eventual payment to be assigned to someone other than the salesperson credited with the sale.
10. In the Variables area of the Plan Element Details page, enter information in the Target, Fixed Amount and Goal fields. See Guidelines.
11. If you are updating a plan element, you can click **Restore** to return to the previously saved version.
12. Click **Update** to save your work.

Guidelines

In step 4, the Commission incentive type is based on formulas in a compensation plan. Bonus incentives are additional compensation based on aggregated transactions.

In step 5, commonly used intervals are Period (month), Quarter, and Year. After a compensation plan has been assigned to a sales role, you can 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. You should not change the credit type of a plan element once the plan element is in use.

In step 7, if you choose an external formula type, you must enter the name of the PL/SQL package in the Package Name field. If you select a formula type of Formula, be sure to select a formula with a status of Complete.

How the Accelerators and transaction factors are used will depend on how your calculation expression is defined. For example, a common input expression that complements a percentage rate table is as follows:

`EVENT_FACTOR* QUOTA_FACTOR*TRANSACTION_AMOUNT/TARGET.`

A typical output expression looks like this:

`Rate_Result* TRANSACTION_AMOUNT* EVENT_FACTOR* PAYMENT_FACTOR.`

You can change the rate table assigned to a plan element at any time, regardless of the rate table assigned to the formula.

In step 10, target, fixed amount, and goal are measurements that will be compared against actual achievements. If you have target, fixed amount, and goal figures against more than one revenue class assigned to this plan element, you can check the sum amounts from the Revenue Classes check box and the totals from all revenue classes will appear in these three fields. The Distribute function allows you to seasonalize your quota, fixed amount and goals.

In general, 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.

5.40 Define Compensation Plans

A compensation plan is built from plan elements. After the plan is assigned an effective start date and an effective end date, it can be assigned to multiple sales roles.

In this release of Oracle Incentive Compensation, four pages are used to define compensation plans. The main page is called Compensation Plan. This page lists all defined compensation plans. It also contains a Create button to go to another page to create new compensation plans.

The three other pages are subheadings of Incentive > Plan, and are called General, Assign Plan Elements, and Sales Roles. The General subheading displays the [Compensation Plan Details](#) page, where you name the compensation plan and enter basic information for it. The second page, [Assign Plan Elements](#), is where you assign the already defined plan elements to the compensation plan. You also can sequence the elements to run in a particular order. The third page, [Sales Roles](#), is where the compensation plan is assigned to sales roles.

Prerequisites

Plan elements must be created.

Steps

1. Click the Incentive tab and click the Plan subtab.
The Compensation Plan page appears.
2. To view or change details for an already created compensation plan, click the plan name in the Name column to go to the Compensation Plan Details page.
3. You can use the search field at the top of the page. Select a saved search from the drop-down list, or click **Personalize** to create a new search.
4. To create a new compensation plan, click **Create**. This takes you to a blank Compensation Plan Details page.
5. Check the Remove check box to delete a compensation plan.
6. If you are updating an existing compensation plan, you can click **Restore** to return to the previously saved information.
7. Click **Update** to save your work.

5.40.1 Compensation Plan Details

The Compensation Plan Details page is where you can make changes to an established compensation plan or create a new plan. If you have arrived at this page by clicking the name of the plan on the Compensation Plan page, some fields will be filled in already. If you clicked **Create**, the fields are blank. To create a new compensation plan, perform the following procedure:

Steps

1. In the Name field, assign a unique name to the new compensation plan.
2. Enter an objective description for this plan based on the associated sales role. The description is used as part of a contract for the salesperson.
3. Assign a start date and end date to the plan. Click the calendar icon to open a pop-up calendar.
4. Check the Allow Revenue Class Overlap check box if you want your plan elements to share some revenue classes.

5. If you are updating an existing plan, you can click **Restore** to return to the previously saved information.
6. Click **Update** to save your work.
7. Click **Assign Plan Elements** to go to the [Assign Plan Elements](#) page.
8. On the Assign Plan Elements, assign the plan elements. (See 5.40.2 below for specific steps.)
9. Return to the Compensation Plan Details Page.
10. Click **Validate**

Guidelines

For easy identification, define plan names by job titles or area of sales you are compensating.

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

5.40.2 Assign Plan Elements

In the Name field of the Assign Plan Elements page, perform the following procedure to assign plan elements you want in the compensation plan.

1. To open the list of compensation plan names for the Name field, enter search parameters and Click **Go**. This opens a pop-up list of available plan elements. Click your selection.
2. Enter a sequence number in the sequence column. This tells the application the order in which to process the plan elements.
3. You can remove a plan element by checking the Remove check box and clicking **Update**.
4. If you are updating an existing compensation plan, you can click **Restore** to return to the previously saved information.
5. When you are finished, click **Update** to save the plan element assignment. The Description, Start Date and End Date fields will populate automatically.

6. Optionally, you can click **Details** next to any plan element to review the plan element details.
7. After the plan elements are assigned and saved, click **General** to return to the Compensation Plan Details page.
8. Click **Validate** to ensure that you have entered the plan information correctly. If everything is correct, the status in the Status field changes from Incomplete to Complete. See Guidelines.
9. Click **Sales Roles** to go to the [Sales Roles](#) page. That is where you assign the compensation plan to a sales role.

Guidelines

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 and uplift factors assigned, with 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 met, then the Status field shows **Complete**. If the Status field displays **Incomplete**, the plan cannot be used to calculate compensation.

5.41 Define Roles

Roles are defined in Resource Manager. Refer to appropriate sections of the *CRM Foundation Implementation Guide* (Defining Role Types) or *CRM Foundation Concepts and Procedures* (Understanding Resource Manager).

5.42 Define Compensation Groups

Compensation Groups are defined in Resource Manager. Refer to appropriate sections of the *CRM Foundation Implementation Guide* (Implementing Resource Manager) or *CRM Foundation Concepts and Procedures* (Understanding Resource Manager).

5.43 Define Resources

Resources are created in Resource Manager. Refer to appropriate sections of the *CRM Foundation Implementation Guide* (Implementing Resource Manager) or *CRM Foundation Concepts and Procedures* (Understanding Resource Manager).

5.44 Assign Resources to Roles and Groups

Resources are assigned to roles and groups in Resource Manager. Refer to appropriate sections of the *CRM Foundation Implementation Guide* (Defining Dynamic Groups) or *CRM Foundation Concepts and Procedures* (Understanding Resource Manager).

Prerequisites

Refer to Resource Manager documentation.

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. The following steps are in the Forms user interface.

1. In the Toolbar, click **Tasks > Import Resources**
2. In the Resource Category field, select **Supplier Contact** from the list of values.
3. Enter information into the Name and Contact fields or select from the list of values.
4. Click **Search**. This populates the Search Results field.
5. Click **Create Resource**.
6. Verify the start date, then click **OK**.
7. Click **Save Resource**, then click **Details**.
8. Create Sales Role and Compensation Group.

9. In the Resource form, assign a valid Salesperson number.
10. Click the Roles tab. Assign a role type from list of values as Incentive Compensation.
11. Assign a Role from the list of values. Save.
12. Click the 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. Save.

5.45 Assign Compensation Plans to Roles

After you have created a compensation plan, you can assign it to multiple sales roles. Perform the following procedures to assign sales roles to a compensation plan.

Prerequisites

The sales roles and a valid compensation plan must already be created.

Steps

1. Click the Incentive tab and click the Plan Subtab. Or, alternatively, you can click the Resource tab and click the Role subtab.
The Compensation Plan page opens.
2. In the Name column, click the compensation plan that you want to assign. Click **Search** or use a saved search for quick access to a list of plans.
The Compensation Plan Details page appears.
3. Click **Sales Roles** to go to the Sales Roles page.
The sales roles already assigned to the compensation plan are listed.
4. Click **Go** next to the first blank name field to open pop-up list of sales roles.
5. Select a sales role and click it.
6. Enter a start date and an end date for the role. If desired, use the calendar icons to open pop-up calendars.
7. Enter additional sales roles in the blank rows provided.
8. As you work, you can click the eraser icon at the left to clear information in a specific row.

9. To delete a sales role, check the Remove check box. The sales role is deleted the next time Update is clicked.
10. If you are updating a compensation plan assignment, you can click **Restore** to return to the previously saved information.
11. Click **Update** to save your work. If the sales role has a description, it will be displayed.

Guidelines

A sales role cannot be assigned to overlapping plans.

5.46 Define Payment Plans

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

In this release of Oracle Incentive Compensation, you can set up the recovery schedule and draw amount independently of the earnings for the period, and you can waive a recovery amount due from a salesperson.

Prerequisites

Credit types must be defined.

Steps

1. Click the Administration Tab and click the Incentive subtab.
2. Select **Payment Plan** on the side panel menu.
The Payment Plan page opens.
3. In the Name column, assign a unique name to the payment plan.
4. Enter a start date and an end date in the appropriate columns. Click the calendar icons to use a pop-up calendar. The Start Date field is required.
5. In the Credit Type column, select a credit type from the drop-down list. Functional Currency is the default, but you can select other, previously defined credit types. The Credit Type field is required.

6. In the Payment Interval column, select a pay interval from the drop-down list. Period is the default, but you can select any previously defined pay interval from the list.
7. Optionally, establish a minimum amount to be paid at the end of each pay interval. Check the check box in the Recoverable column if it is recoverable from later earnings.
8. Optionally, establish a maximum amount that can be paid for any pay interval. If you check the check box in the Pay Later column, any amounts over the maximum to be paid can be rolled over and paid in future periods.
9. Select a recovery interval from the drop-down list. The default setting is the same as the pay interval.
10. Check the Pay Against Commission check box if you want the payment plan to apply its rules using earnings that have been collected in the application when it calculates draw recovery at the end of the recovery interval.
11. If necessary, click **Restore** to return to the previously saved information
12. Click **Update** to save the payment plan.

The payment plan is assigned to a salesperson in the Resources subtab of the Resource tab.

Guidelines

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

5.47 Assign Pay Groups to Salespeople

A pay group defines the frequency of payments, such as monthly or semi-monthly, for the resources who are assigned to the pay group. To assign a pay group to a resource, perform the following procedure.

Prerequisites

The pay group is defined in Administration > Incentive > Paygroup. The resource has been selected from the Salesperson Summary.

Steps

1. Click the Resource tab and click the Resources subtab.

2. Enter the name of a valid resource by using the search parameters. Click **Search**.

The Employees page appears.

3. Click the name of the resource to whom you want to assign a pay group.
4. Click **Pay Groups** in the side panel menu.

The Assign Pay Groups page opens.

5. Enter a pay group name in the Name field. Or, enter the first four characters of a pay group name and click **Go** to search.
6. Enter a start date and an end date in the fields. An end date is optional.
7. Click **Update** to save.
8. If needed, click **Restore** to return data to the previously saved information.

Guidelines

A salesperson can be assigned multiple pay groups, but only one pay group can be active at a time.

5.48 Assign Payment Plans

Prerequisites

Payment plan must be created in Administration > Incentive > Payment Plan.

Steps

1. Click the Resource tab and click the Resources subtab.
2. Enter the name of the resource to whom you want to assign a payment plan. Or, enter full or partial information into one or more search parameter fields and click **Apply** to search.
3. In the side panel menu, select Assign Payment Plans.
The Assign Payment Plans page opens.
4. Enter the name of a payment plan in the first open Name field. Or, enter the first four or more characters of a plan name and click **Go** to search.
5. Enter a Start Date and End Date for the payment plan. Click the calendar icon to the right of each field to use the calendar entry.

6. Enter minimum and maximum amounts to be used in the plan.
7. If necessary, click **Restore** to return to the previously saved information.
8. Click **Update** to save.

A confirmation is displayed across the top of the page if your payment plan assignment was successful. Also, the Recoverable and Pay Later fields are populated.

5.49 Customize Quota and Rates for Salespeople

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

Prerequisites

None

Steps

1. Click the Resource tab and click the Resources subtab.
2. Enter the name of the resource whose plan you want to customize.
The Assign Pay Groups page appears.
3. Click **Compensation Plans** at the top of the page to go to the Compensation Plans page.
4. Enter search parameters into the Role Name field at the top of the page and click **Go**.
5. Click the sales role that you want and click **Apply**.
The compensation plans and plan elements for the resource and sales role are displayed.
6. Check the check box in the Customized Flag column next to the plan element to be customized.

Note: 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. If you check the check box, that element will not be affected by any overall changes you make to it.
7. Click the plan element name.

The Plan Element Details page is displayed.

8. 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 on the Plan Element Details page.
9. If necessary, click **Restore** to return to the previously saved information.
10. Click **Update** to save your changes.

Guidelines

Although you can customize the rates for individual resources, they 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 tier in the rate table assigned to that compensation plan, 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.

References

The table below shows the editable fields to customize a plan.

Tab Location	Field
General	Quota
	Fixed Amount
	Goal
General > Distribute Variables	All fields (quota, fixed amount, and goals allocated by amount and percentage)
Revenue Class	Quota
	Fixed Amount
	Goal
	Payment Accelerator
	Quota Accelerator
Rate Tables	Commission rate
Payees	Alternate payees can be selected along with effective dates for this plan element.

5.50 Reports

The following reports are available in this release:

Incentive Planning Reports

There are ten Incentive Planning reports. Click the link in the report name column on the Reports subtab on the Quota tab to go to a search page. For the first nine reports, you arrive at the Resource Search page. On the Resource Search page, enter search parameters and click **Apply**, and the report appears.

For the Role To Compensation Plan Mapping Report, clicking the link takes you to a specific search page with three fields. Enter search parameters, click **Apply**, and the report appears.

Note: The report link name on the Reports summary page may vary slightly from the actual name of the report.

These are the ten Incentive Planning reports:

[Quota Modeling Summary](#)

[Average Quota Report](#)

[Quota Overassignment Report](#)

[Quota Range Report](#)

[Compensation Contract Status](#)

[Overlay Report](#)

[Vacancy Report](#)

[Transition Report](#)

[Plan Activation Status Report](#)

[Role to Compensation Plan Mapping Report](#)

Compensation Reports

Oracle Incentive Compensation provides eight Compensation Reports in HTML format. The Summary of Compensation Reports page lists these reports. Click the links to access them.

For some of the reports, when you click the link, a Salespeople Search page appears. Use search parameters to get to a Salesperson Search Results page. A few reports

display another search parameter page after you make a selection from the Salesperson Search Results page.

Three reports do not use the Salesperson Search page or Salesperson Search Results page. The Classification Rules Report link leads to the Classification Rules Search page. The Commission Summary Report and the Quota Performance Report open directly from their Summary of Compensation Reports page links.

The steps below apply to the reports that use the Salesperson Search page and Salesperson Search Results page.

[Year To Date Summary](#)

[Transaction Details](#)

[Compensation Group Hierarchy](#)

[Classification Rules Report](#)

[Commission Summary](#)

[Quota Performance](#)

[Commission Statement](#)

[Unprocessed Transactions](#)

5.50.1 Quota Modeling 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 accumulating 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.

Navigation

Quota > Report > Quota Model Summary

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

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

5.50.2 Average Quota Report

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 *Oracle Incentive Compensation Concepts and 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.

Note: The percentage values shown are percentages of the actual quota and not rounded figures.

Navigation

Quota > Report > Average Quota Summary

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

Column Title	Description
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.

5.50.3 Quota Overassignment Report

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.

Navigation

Quota > Report > Overassign Quota Summary

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

5.50.4 Quota Range Report

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.

Navigation

Quota > Report > Quota Range Summary

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

5.50.5 Compensation Contract Status

This report shows the number of people at each state of the approval process for a selected manager in a compensation group. To create a report for a specific manager, enter information into one or more fields below.

Navigation

Quota > Report > Compensation Contract 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 Salespeople Found. Select a name in the salesperson Name column.

Data

In the Compensation Contract Status report, the columns represent lines of business, including a total. The rows represent stages in the contract process, including Pending Approval, Pending Distribution, Pending Acceptance, and Accepted. There is a total row for each line of business.

5.50.6 Overlay Report

This report lists all overlay salespeople, if any, who are members of the compensation group and groups below this group. (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.

Navigation

Quota > Report > Overlay Summary

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

5.50.7 Vacancy Report

This report lists all positions, by sales role and compensation group, that have not been filled for a particular manager. It is a concise means of listing vacancies and additional headcount requirements on one report.

Navigation

Quota > Report > Vacancy Summary

Parameters

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

Prompts	Choices	Mandatory
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 vacancies in the compensation group selected
Compensation Group	Lists the compensation group manager's name
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
Final Quota	Displays the rounded figure of the total quota assigned

5.50.8 Transition Report

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

Navigation

Quota > Report > Transitional Salespeople

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

5.50.9 Plan Activation Status Report

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. 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.

Navigation

Quota > Report > Plan 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 %

Prompts	Choices	Mandatory
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

5.50.10 Role to Compensation Plan Mapping Report

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.

Navigation

Quota > Report > Role to Compensation Plan Mapping

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"

Prompts	Choices	Mandatory
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
Start Date	Displays the beginning date of the compensation plan
End Date	Displays the lapsed date of the compensation plan

5.50.11 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, Incentive Compensation Payment, and Incentive Compensation 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.

You can click the Download button to save the report in an Excel file. Note: If all of the digits do not display properly in the downloaded report, right-click in the cell and format the cell as General.

Navigation

Transaction > Report > Year to Date Summary

Parameters

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

Prompts	Choices	Mandatory
Fiscal Year	List of Values	

Data

Column Title	Description
Quota Category	Displays each quota assigned to the resource
Period	Periods of the year displayed, for example, Jan-01 through Dec-01, with earnings shown below them.
Other	Begin Balance, Quota Earnings, and Payment rows shown at the bottom for each column.

5.50.12 Transaction Details

This report shows transactional details of the specified salesperson and is used primarily by the Analyst. 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.

Navigation

Transaction > Report > Transaction Details Report

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	

Prompts	Choices	Mandatory
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
Period (for example, Jan-01)	Amount
Invoice Date	Invoice Date
Order Date	Order Date
Order Number	Order Number
Commission Amount	Commission Amount
Credit Receiver	Credit Receiver

5.50.13 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.

Navigation

Transaction > Report > Compensation Group Hierarchy Report

Parameters

Prompts	Choices	Mandatory
Effective Date	List of Values	Yes

Prompts	Choices	Mandatory
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

5.50.14 Classification Rules Report

This report displays the Rule Name, Revenue Class, and Expression for classification rules selected from the list on the Rules Found page.

Click **Download** to generate an Excel report.

Navigation

Transaction > Report > Classification Rules Report

5.50.15 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 three extra columns (on the far right) available through this report. This report is accessible through Incentive Compensation Super User by default whereas the Quota Performance report is accessible by default to those users with Manager and Salesperson responsibilities.

You can change four fields before displaying the report by selecting from drop-down lists.

Steps

1. Select an Analyst from the drop-down list. The default is All.

2. Select a period from the drop-down list.
3. Select Functional Currency in the Credit Type field.
4. Select a Reporting Currency for the report from the drop-down list.
5. Click Apply.
The report displays.
6. Click the Personalize button at the end of the report to customize the report.
Check check boxes to select Display Quota Groups (Bonus or Quota) and Display Periods (Annual, Year to Date, Period to Date).
7. Click the Download button at the end of the report to download the report as a file.

Navigation

Transaction > Report > Commission Summary

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

Column Title	Description
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
Draw	Amount of Draw paid
Net Due	Amount due after deductions

5.50.16 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.

Navigation

Transaction > Report > Quota Performance

Parameters

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

Prompts	Choices	Mandatory
Credit Type	List of Values	Yes

Data

Column Title	Description
Name	Salesperson Name
Employee Number	Salesperson's Employee 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 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)

5.50.17 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.

You can change four fields before displaying the report by selecting from drop-down lists.

Steps

1. In the Period Type field select Period, Quarter, or Year from the drop-down list.
2. In the Period field select a period.
3. In the Compensation Category field, make a selection. The default setting is All.
4. In the Reporting Currency field, you can select from a list of currencies in which to display the report.
5. Click Apply to display the report.

Guidelines

After the report is displayed, you can drill down on a amount in the Invoice Number column to display the Invoice Detail page. This page displays the following information:

- Number
- Payment Type
- Receipt Date
- Maturity Date
- Customer Name
- From Bank
- From Account

Payment information includes the following:

- Currency
- Payment Amount
- Amount Applied
- On Account
- Unapplied Account

The Line Details area displays eleven columns of information related to the transaction.

You can click the amount in the Order Number column to display the Order Detail page. This page shows the following general information:

- Number
- Date
- Type
- Salesperson

The Order Detail page displays the following shipping information:

- Ship to Person
- Ship to Address
- Ship Method

The area below the shipping information displays billing information:

- Bill to Person
- Bill to Address
- Taxable
- Currency
- Freight Terms
- Total

The Line Details area at the bottom of the screen shows nine fields of information related to the order itself, including the product, quantity ordered, and extended price.

Navigation

Transaction > Report > Commission Statement

Also, you can drill down to this report from the Year to Date Summary.

Parameters

Prompts	Choices	Mandatory
Salesperson Name	List of Values	Yes
Period	List of Values	Yes

Prompts	Choices	Mandatory
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

5.50.18 Unprocessed Transactions

This report shows all transactions that:

- a. Have not been loaded, or
- b. Are in the status of Failed Classification, Classified, Rolled Up or Failed Rollup.

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.

Navigation

Transaction > Report > Unprocessed Transactions

Parameters

Prompts	Choices	Mandatory
Salesperson Name	List of Values	Yes
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

5.50.19 Report Access by Responsibility

The headings list six Incentive Compensation report users. An **x** indicates that the report is accessible with the corresponding default responsibility

	Incentive Planning Analyst	Incentive Planning Finance Manager	Incentive Compensation Payment	Incentive Compensation Manager	Incentive Compensation Salesperson	Incentive Compensation Super User
Incentive Planning Reports (Quota tab)						x
Quota Model Summary	x	x				x
Average Quota Summary	x	x				x
Quota Overassignment Report	x	x				x
Quota Range Report	x	x				x
Compensation Contract Status						x
Overlay Report	x	x				x
Vacancy Summary	x	x				x
Transition Report	x	x				x
Plan Activation Status Report	x					x
Role To Compensation Plan Mapping Report	x					x

	Incentive Planning Analyst	Incentive Planning Finance Manager	Incentive Compensation Payment	Incentive Compensation Manager	Incentive Compensation Salesperson	Incentive Compensation Super User
Compensation Reports (Transaction tab)						x
Year to Date Summary			x	x	x	x
Transaction Details			x			x
Compensation Group Hierarchy			x			x
Classification Rules						x
Commission Summary			x			x
Quota Performance			x	x	x	x
Commission Statement			x	x	x	x
Unprocessed Transactions			x			x

5.50.20 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 the System Administrator.
2. Select AK Developer responsibility.
3. Select Define Regions.
4. Query the specific JSP Name.
5. Click the 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'.

Verifying the Implementation

6.1 Oracle Incentive Compensation Implementation Verification Tasks

This material will be supplied later.

Diagnostics and Troubleshooting

7.1 Common Implementation Errors

This material will be supplied later.

7.2 Log Files and Error Messages

This material will be supplied later.

Integration with Other Oracle Products

Oracle Incentive 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 Incentive Compensation and custom interfaces, you can accomplish some of the critical tasks of an incentive compensation process:

- Collect sales transaction data from Oracle Receivables, Oracle Order Management, and other sources
- Pay supplier contract type resources using Oracle Accounts Payable
- Integrate with Oracle Payroll for employee type resources
- Generate reports related to compensation and other useful sales benchmarks (see 5.50).
- Use Oracle Sales Online for Income Planner and salesperson self service needs

Using Oracle CRM Foundation Resource Manager module, you can:

- Maintain sales roles and compensation groups
- Maintain salespeople information

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

8.1 Overview

Oracle Incentive Compensation exchanges information with other products within the Oracle e-Business Suite. Transactions, the raw material that fuels Oracle Incentive 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 incentive 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 Incentive Compensation, as well as all other applications in the Oracle e-Business Suite, must use the Oracle Quoting - Forms module to interface to Order Management.

Resource Manager is the common source for resource definition, and the ability of Oracle Incentive Compensation 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 and assign salespeople to them
- Create compensation groups, the basis of a sales hierarchy

In addition to these traditional sources of information, release 11*i* of Oracle Incentive Compensation provides two-way integration to applications such as

Oracle Sales Online, Business Intelligence Systems (BIS), and other applications within the e-Business Suite.

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.

8.2 Oracle Sales Online

The Compensation tab > Compensation Plan subtab in Oracle Sales Online can be used by:

- A salesperson to accept a compensation plan.
- A manager to distribute compensation plans for salespeople in his or her hierarchy.

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.

Perform the following procedure to enable access to the Compensation tab in Oracle Sales Online.

Prerequisites

System Administrator responsibility is required. This procedure is performed in the Forms version of Oracle Incentive Compensation.

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. 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.)
6. Assign Sales Online user responsibility to the user.
7. In Resource Manager, assign the role type of Sales to the user with a manager or member role.
8. Assign Group usage Sales and Telesales for the group to which the user belongs.

8.2.1 Year to Date Summary

This report is an overview of a salesperson's achievements, commission and bonus earnings and advances or draws.

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 check box on the Plan Element form. The pay out section is grouped by earnings type and by period.

Prerequisites

You must have access to Oracle Incentive Compensation through Oracle Sales Online.

Steps

1. Click the Compensation tab and click the Year to Date Summary subtab.
2. Select a credit type from the drop-down list. Functional Currency is the default setting.
3. Select a reporting currency from the drop-down list. Functional Currency is the default setting.
4. Select a fiscal year from the drop-down list.
5. Click **Apply**.

8.2.2 Planning

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

Prerequisites

A compensation plan must already be created.

Steps

1. Click the Compensation tab and click the Planning subtab.
The My Compensation Groups page appears.
2. Select an organization from the drop-down list.
3. Select an effective date. You can click the calendar icon to open a pop-up calendar.
4. Any compensation groups within the parameters is displayed below.

Guidelines

For more information, see Incentive Planning in Chapter 5.

8.2.3 Compensation Plan

This subtab is divided into two areas: My Compensation Plans and My Salespeople.

As a manager, you can see compensation plans for which you are responsible in the first area and also the resources to whom the plans can be assigned. You can then distribute compensation plans in the My Salespeople area.

Steps

In the Distribute column, check the check box for each plan you want to distribute.
Click **Distribute**.

8.2.4 Income Planner

Income planner enables salespeople to plan their sales volumes to reach their commission earning goals. A salesperson can enter a Commission Forecast number and see the amount of commission he or she will earn, based on their compensation plan. Click the Compensation tab in Oracle Sales Online to access Income Planner.

Before you can use Income Planner in Oracle Sales Online, you need to assign forecast input and output formulas to your Compensation Plan in Oracle Incentive Compensation. The forecast formulas are the same as the formulas used in the elements of your compensation plan, except that you must insert Forecast Amount as a calculation expression in order to use Income Planner in Oracle Sales Online.

To enable Income Planner in Oracle Sales Online, perform the following procedures in Oracle Incentive Compensation.

Steps

To create Forecast expressions, do the following:

1. Click the Incentive tab and click the Expression subtab.
The Calculation Expression page appears.
2. Click Create to open a blank page.
3. Enter a name for the input formula.
4. In the Details area, enter Forecast Expressions from the Type drop down list.
5. 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.
6. Click Update to save your input expression.
7. Repeat steps 2 through 6 to create an output expression.

Note: The output expression must contain Rate Table Result as the first element selected and Forecast Amount should appear in the expression as well.

8. Click Update to save your output expression.

To assign your Forecast expressions to the formula in your plan element, do the following:

1. Click the Formula subtab in the Incentive tab.
2. Select the formula you want from the table or use the search parameters to search by name, type, or status.
The Formula Definition page appears.
3. Click Assign Expressions to open the Assign Expressions page.
4. In the Input area, select your input forecast expression from the drop down list.
5. In the Output area, select your output forecast expression from the drop down list.
6. Click Update to save your work.
7. Perform this series of steps for each formula in your compensation plan.

8. When making revisions to a saved page, click Restore to return to the previously saved version.

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 $\text{Forecast amount}/\text{TARGET}$ and the output forecast formula is $\text{Rate Table Result} * \text{Forecast amount}$. 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.

A forecast amount based on each plan element is displayed if the Interest Type from Oracle Sales is mapped to the plan element.

8.2.5 Reports

Users of Oracle Sales Online can click the Reports subtab of the Compensation tab to see three Oracle Incentive Compensation reports:

- [Year to Date Summary](#)

See 8.2.1 above for details.

- 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.

- Commission Statement

This report shows transaction details broken down by period for a salesperson. It is configurable and you can hide or show selected columns. You can use search parameters to make the report specific to your needs.

8.2.6 Top Performers Bin

The Top Performers bin in Oracle Sales Online enables you to monitor the performance of your direct reports and indirect reports in a number of ways. You can:

- View total payments by quarter.

- Drill down to the top performers reports.
- Show reports for direct and indirect salespeople in the same organization or across organizations.
- Show Year to Date as well as quarterly information.
- View payments and earnings in the currency you select.
- View the payments and earnings for the accounting calendar by manager.

8.2.7 Forecast Hierarchy Drilldown to Year to Date Summary

You can drill down to the Year to Date Summary from the Forecast page in Oracle Sales Online. Perform the following procedure to do this:

Steps

1. Click the Forecast tab.
The Forecast page appears.
2. In the Subordinate Forecasts area, click the icon in the Compensation column to the far right of the table.
3. The Year to Date Summary page appears.

8.3 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 > Roles**.
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 Incentive Compensation choose Incentive 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.

8.4 Oracle Payable

Oracle Payable recognizes Salespeople for payment only if they are activated as Suppliers through Oracle Purchasing. To pay full-time, regular employees, use Payroll. Please refer to Oracle Purchasing documentation.

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, the user will send payrun details to the Oracle Payable Invoices Interface table.

The following two tables show the columns that 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.

8.5 Oracle Partners Online

Oracle Partners Online permits access to some pages in Oracle Incentive Compensation, much the same as Oracle Sales Online does, through the Compensation tab. However, Oracle Partners Online does not allow access to a Year to Date Summary or a Top Performers Bin, and there is no drilldown to the Year to Date Summary in the Forecast Hierarchy. See [Oracle Sales Online](#) for more details.

Flexfields

A.1 Flexfields

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

In Oracle Incentive Compensation there are 13 flexfields, as listed in the table below. In the current release, flexfields are enabled only in compensation plans and the adjustments screen. 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
CN SRP Quota Rules	CN_SRP_QUOTA_RULES_ALL
CN Trx	CN_TRX_ALL
CN Trx Batches	CN_TRX_BATCHES_ALL

Flexfields	
CN Trx Lines	CN_TRX_LINES_ALL
CN Trx Sales Lines	CN_TRX_SALES_LINES_ALL

B.1 Lookups

Lookups enable quick selection from drop-down menus. Oracle Incentive 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. You can add lookups and add values to the default lists.

To view lookups, perform the following procedure.

Prerequisites

Log in as the Super User responsibility in the Forms version of the application.

Steps

1. From the Toolbar, click Systems.
2. Select Lookups from the drop-down menu.
The Oracle Incentive 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 Incentive Compensation Lookups window displays the lookups individually as they are currently configured.

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

1. Perform steps 1 to 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 Incentive Compensation Lookups window appears.
3. Click the Application field and select Oracle Incentive 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 Oracle Incentive Compensation Lookups, including a description, Access Level, and Seeded Values and Meanings.

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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 Processing Error) OE_ERROR (Error During Order Entry) OTHER SHARED (Commission should be Split)
ADJUSTMENT_STATUS	Manual Adjustment Status	E	CANCELLED POSTED REVERSED REVIEW TRIAL
ADJUST_STATUS	Transaction Adjust Status	E	DEALASGN (Deal Move) DEALSPLIT (Deal Split) FROZEN INVLOAD (Invoice Captured) MANUAL MASSADJ (Move Credits) MASSASGN (Share Credits) ORIGINAL REVERSAL SPLIT (Splits)
AMS_CUSTOM_SET_OBJECTS	AMS Custom Set Objects		PLAN_ELEMENT
AMS_CUSTOM_SETUP_OBJECTS	AMS Custom Setup Objects		PLAN_ELEMENT

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
AMS_SYS_ARC_QUALIFIER	AMS System Architecture Qualifier		PE_ARC (Revenue Classes) PE_ART (Rate Tables) PE_DTLS (Main)
ANC_CALC_METHOD	Anchor Calculation Method		LINE_CALC (Line Calculation) STEP_CALC (Step Calculation)
APPLICATION_TYPE	Application Type	E	AR (Oracle Receivables) CN (Oracle Commissions) 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	COMPLETED FAILED INCOMPLETE PROCESSING (In Progress)
CALCULATION_TYPE	Types of Calculation	E	BONUS COMMISSION

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
CALC_SUBMISSION_OBJECT_TYPE	Calculation Submission Object	E	CALC_TYPE (Calculation Type) CONCURRENT_FLAG (Concurrent Calculation) EMPLOYEE_NUMBER EMPLOYEE_TYPE END_DATE HIERARCHY_FLAG (Entire Hierarchy) INTELLIGENT_FLAG (Do incremental calculation) INTERVAL_TYPE 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_OPERAND	Incentive Compensation Operand		0 (AND) 1 (OR)
CN_OPERATOR	Incentive Compensation Operator		0 (AND) 1 (OR)
CN_PAY_GROUP_DTLS_TYPE_CODE	Pay Group Details Type Code		PERIODS SALESPEOPLE

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
CN_PROMPTS	Prompt Texts used in UI	E	DIMENSION_NAME EXP_NAME (Expression Name) FORMULA_NAME RATE_TABLE_NAME
CN_SEARCH_CATEGORIES	Incentive Compensation Search Categories	U	JOB_TITLE ROLE SALESREP (Salespeople)
CN_USAGE_FLAG	Incentive Compensation Usage Flag		C (Collection) Y (Calculation)
COLLECTION_TYPE	Collection Type	U	CN_COLLECT_CLAWBACK (Clawbacks) CN_COLLECT_CUSTOM (Collect Custom Transaction Source) CN_COLLECT_INVOICES CN_COLLECT_ORDERS CN_PAYMENTS_AND_GIVEBACKS CN_COLLECT_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 Name) DESC (Description) END_PERIOD REV_CLS_OVERLAP (Allow Revenue Class Overlap) START_DATE START_PERIOD STATUS_CODE

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
CP_PHASE_CODE	Concurrent Request Phase Code	E	C (Complete) I (Inactive) P (Pending) R (Running)
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

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
DELIMITER_TYPE	Delimiter Type		COMMA (Comma) QUOTE (Single Quotation) DOUBLEQ (Double Quotation) SEMICOL (Semicolon) SPACE (Space) TAB (Tab)
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 (Revenue Class Rollup) SALESREP (Sales Representative Rollup)
DISTRIBUTE_METHOD	Method for distributing quota	E	EQUAL EVEN MIN (Minimum)
DYNAMIC_PROMPT	Period Processing Status Dynamic Prompt	E	DISTRIBUTE_DRAQW DISTRIBUTE_TARGET DRAW PAYMENT PERIOD_DRAW PERIOD_TARGETS TARGET
ELEMENT_TYPE	Element Type	U	-1000 (Recoverable Payment) -1001 (Nonrecoverable Payment)
ENCLOSED_TYPE	Enclosed Type		COMMA (Comma) QUOTE (Single Quotation) DOUBLEQ (Double Quotation) SEMICOL (Semicolon)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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 (And) BET (Between) GT (Greater than) IIH (Is in Hierarchy) IS (Is) LT (Less than) NOT (Not) OR (Or) RES (Result) WV (With Value)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
EXPRESSION_TYPE	Expression Type		EXPRESSIONS(EXTERNAL_ELEMENTS FORECAST_AMOUNT FORMULAS GROUP_FUNCTIONS NUMBER_FUNCTIONS OSC_ELEMENTS (Sales Compensation Elements) OTHERS PLAN_ELTS (Plan Elements) RATE_TABLE_RESULT SQL_FUNCTIONS
EXTERNAL_TABLE	External Table		ALIAS (Alias) CN_CALC_EXT_TABLE_ID (Table) COLUMN (Columns) EXTERNAL_COLUMN_ID (External Column Name) EXTERNAL_TABLE_ID (External Table Name) INTERNAL_COLUMN_ID (Internal Column Name) INTERNAL_TABLE_ID (Internal Table Name) NAME (Name) SCHEMA (Schema) USED_FLAG (Used Flag)
FORMULA_STATUS	Formula Status	E	COMPLETE FAILED INCOMPLETE IN_PROGRESS INVALID VALID

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
FORMULA_TYPE	Formula Type	E	B (Bonus) C (Commission)
HEADER_TRX_STATUS	Header Transaction Status		CLS (Classified) COL (Unprocessed) ROLL (Rolled Up) XCLS (Failed Classification) XROLL (Failed Rollup)
HOLD_REASON_CODE	Hold Reason Code		HOLD
IMPORT_STATUS	Import Status		CANCEL (Canceled) COMPLETE (Completed) FAIL (Failed) IMPORT_FAIL (Failed at Importing) NEW (New) SCHEDULE (Scheduled) STAGE (Staged) STAGE_FAIL (Failed at Staging) SUBMIT (Submitted)
IMPORT_TYPE	Import Type		TRXAPI (Transaction API)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
INPUT_TOKEN	Input Token	E	NAME (Name) PE_NAME (Plan Element Name) QC (Quota Category) QSR (Quota Category/Sequence/Role) RC (Revenue Class) RCS (Role, Compensation Plan/Start Date) RP (Base Quota Component/Percent) SD (Start Date) 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)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
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
MODEL_ACTIVATE_STATUS	Model Activate Status		ACTIVATED NOT_ACTIVATED
MODEL_STATUS	Model Status		MODELED NEW PENDING GENERATED
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
NOTIF_LOOKUP_TYPE	Lookup used by SF Planning workflow process	E	ACCEPT/REJECT APPROVE CUSTOMIZED DISTRIBUTE NOTIFIED (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

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
PAYABLES_CCID_LEVEL	Payables CCID Level		REVCLS (Revenue Class) PLANELEM (Plan Element) CUSTOM (Custom) CLASSIFICATION (Classification)
PAYGROUP_UPGRADE_TYPE	Paygroup Upgrade Type	E	UPGRADE_PAYGROUP
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_DTLS_TYPE_CODE	Pay Group Details Type Code		PERIODS SALESPEOPLE
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
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)
PERIOD_PROCESSING_STATUS	Period Processing Status	E	CALCULATED CLASSIFIED CLEAN POPULATED PROCESSING (In Progress) ROLLED_UP UNCLASSIFIED
PERIOD_TARGET_DIST_RULE	Period Target Distribution Rule	E	EQUAL USER_DEFINED
PERIOD_TYPE_CODE	Period Type	E	PERIOD QUARTER YEAR

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
PE_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) QUOTQ_TYPE (Element Type) RATE_TB (Rate Table) RATE_TB_ID (Rate Table ID) REV_CLS_ID (Revenue Class ID) REV_CLS_NAME (Revenue Class Name)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
PE_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

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
PLAN_TYPE_SUMMARY_STATUS	Plan Type Summary Status		PLGS (Pending Approval) APPROVED (Pending Distribution) ISSUED (Pending Acceptance) ACCEPTED (Accepted)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
PRE_PROCESSED_CODE	Preprocessed Code		CRPN (Skip Calculation) CRPC (Skip Nothing) CRNC (Skip Population) CRNN (Skip Population and Calculation) CNPC (Skip Rollup) CNPN (Skip Rollup and Calculation) CNNC (Skip Rollup and Population) CNNN (Classification Only) NRPC (Skip Classification) NRPN (Skip Classification and Calculation) NRNC (Skip Classification and Population) NRNN (Rollup Only) NNPC (Skip Classification and Rollup) NNPN (Population Only) NNNC (Calculation Only) NNNN (Skip All)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
QUOTA_CATEGORY	Quota Category Type	E	FIXED TOTAL_QUOTQ 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)
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
RATE_CALC_METHOD	Rate Calculation Method		ANCHORS SINGLE_RATE

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
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)
RETURN_STATUS	API Return Status	E	E (Error) S (Success) U (Unexpected Error) W (Warning)
REVENUE_TYPE	Transaction Credit Type	E	NONREVENUE REVENUE
RS_OBJECT_TYPE	Rate Table Objects	E	COMM_AMT (Commission Amount) COMM_UNIT_CODE (Commission Unit Code) MAX_AMT (To Tier Maximum Amount) MIN_AMT (From Tier Minimum Amount) RATE_TB_NAME (Rate Table Name) TIER_UNIT_CODE

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
RULESET_TYPE	Ruleset Type	E	DATA_FLAG END_DATE EXPRESSION (Expressions) MODULE_TYPE OBJECT_NAME PARENT_RULE_ID (Parent Rule Identifier) RULES (Rules) RULE_ATTRIBUTES (Attributes) RULESET_ID (Ruleset Identifier) RULESET_NAME RULE_ATTRIBUTE_ID (Rule Attribute Identifier) RULE_ID (Rule Identifier) RULE_NAME SEQUENCE_NUMBER START_DATE
SALESREP_OPTION	Salesrep Option	E	ALL_REPS (All Salespeople) REPS_IN_NOTIFY_LOG (Salespeople in Notify Log) USER_SPECIFY (Salespeople specified by you)
SALESREP_STATUS	Salesrep Status		A (Active) I (Inactive)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
SCENARIO_STATUS	Scenario Status		SET NOT_SET

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code 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)
SPLIT_FLAG	Split Flag		N (No Split) P (Proportional) Y (Proportional)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
TABLE_LEVEL	Table Levels	E	D (Dimension) H (Header Level) I (Internal) L (Line +) N (None) S (Sales Line)
TABLE_TYPE	Table Types	E	T (Table) V (View)
TABLE_USAGE	Table Usage		C (Collection) N (None) Y (Calculation)
TBL_COL_DETAIL	Table Column Detail		COL (Columns)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
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)
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)

Incentive Compensation Lookup Type	Description	Access Level	Lookup Code and Meaning
UNIT_OF_MEASURE	Measurement unit	E	AMOUNT EXPRESSION PERCENT STRING
UNIT_TYPE	Unit Type		UNIT REVENUE
VIEW_PROCESS_LOG_TYPE	View Process Log Type		ALL BRIEF MILESTONE (Milestone Only) ERROR (Errors Only) DEBUG (Debugs Only)
YES_NO	Yes or No	E	N (No) Y (Yes)

System Profile Options

C.1 System Profile Options

The table below lists the profile options which need to be set to implement Oracle Incentive 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 incentive compensation. The options can be set in any sequence.

To set system profile options:

1. Log in to the Forms version of Oracle Incentive Compensation and choose the Incentive 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:
 - *Site*: Use if the profile option applies to all users at your site.
 - *Application*: Oracle Incentive 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 Oracle Incentive Compensation, along with a description of each.

Guidelines

The *OSC: Multi Rollup Path* profile option is used to set up managerial rollups for a salesperson who is assigned the same role in multiple groups. This release of Oracle Incentive Compensation does not support rollup along multiple paths when the managers receiving the credit have different roles in the compensation groups along the rollup paths.

Profile Option Name/Default	Description	Site Level	Application Level	Responsibility Level	User Level
OSC: Collect on Account Credits CN_COLLECT_ON_ACCT_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.	Yes	Yes	Yes	Yes
OSC: Commission Rate Precision CN_COMM_RATE_PRECISION Default: Null	Determines the commission rate precision. For example, 1.035 has a precision of 3.	Yes	Yes	Yes	Yes
OSC: Debug Mode CN_DEBUG 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.	Yes	Yes	Yes	Yes
OSC: Default Custom Flag CN_CUSTOM_FLAG Default: Yes	When set to Yes, the compensation plans are customized. Otherwise, they are not customized.	Yes	Yes	Yes	Yes

Profile Option Name/Default	Description	Site Level	Application Level	Responsibility Level	User Level
OSC: Log File CN_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.	Yes	Yes	Yes	Yes
OSC: Log File Directory CN_LOG_FILE_DIR	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.	Yes	Yes	Yes	Yes
OSC: Mark Events CN_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.	Yes	Yes	Yes	Yes
OSC: Prior Adjustment CN_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.	Yes	Yes	Yes	Yes
OSC: Sleep Time in Seconds CN_SLEEP_TIME 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.	Yes	Yes	Yes	Yes

Profile Option Name/Default	Description	Site Level	Application Level	Responsibility Level	User Level
OSC: Default Conversion Type CN_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)	Yes	Yes	Yes	Yes
OSC: Salesforce Planning FY CN_SP_PLANNING_FY	Enter planning financial year.	Yes	No	No	No
OSC: Scaling Factor CN_SCALING 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".	Yes	Yes	Yes	Yes
OSC: Salesforce Planning Debug Mode CN_SP_DEBUG Default: No	Determines whether input variables show on the window	Yes	No	No	No
OSC: Multi Rollup Path CN_MULTI_ROLLUP_PATH Default: Yes	Enables rollup of sales credits through multiple paths of the compensation group hierarchy.	Yes	Yes	Yes	Yes
OSC: Currency Exchange Rate Date CN_SP_GL_RATE_DATE Default: System date	Enter date for reading the exchange rate in Oracle GL.	Yes	No	No	No

Profile Option Name/Default	Description	Site Level	Application Level	Responsibility Level	User Level
OSC: Workflow Initial Wait Time in Hours CN_WF_INIT_WAIT_TIME	Enter number of hours before the first reminder is issued.	Yes	Yes	Yes	Yes
OSC: Workflow Reminder Frequency in Hours CN_WF_REMINDER_TIME	Enter number of hours interval between each subsequent reminder.	Yes	Yes	Yes	Yes
OSC: SFP Responsibility Group CN_SFP_RESP_GROUP	Profile that is to be set up for each responsibility created for use in Salesforce Planning. The four permissible values are Super User, Contract Approver, Finance Manager, and Sales Manager. The profile setting identifies the data access privileges that are assigned to a particular responsibility.	No	No	Yes	No
OSC: Import Server Side Data File Directory CN_IMP_SERVER_PATH	The absolute path where the excel files for server side transaction import are located.	Yes	Yes	Yes	Yes
OSC: Import Control File Directory CN_IMP_CONTROL_PATH	This profile should be set to absolute path for \$CN_TOP/bin. This is the directory where the control file for SQLLOAD for transactions is generated.	Yes	Yes	Yes	Yes
OSC: Tracking Invoice Lines CN_TRACK_INVOICE	When this profile is set to 'Y', any splits or moves done to Invoices are updated to the credit memos and payments, unless the transactions are delinked.	Yes	Yes	Yes	Yes

Profile Option Name/Default	Description	Site Level	Application Level	Responsibility Level	User Level
OSC:Display Draw Related Data in YTD Report CN_DISPLAY_DRAW	In OSO, the draw related information is displayed on the YTD report when this profile is set to 'Y'. Otherwise, the draw related data is not displayed.	Yes	Yes	Yes	Yes
OSC: Use Work Day Calendar CN_SFP_USE_WRKDAY	This profile enables use of the Workday Calendar in proration calculation. (Default is No). Only when this profile is set to Yes is the Workday calendar that is defined for the organization used in proration calculation.	Yes	No	Yes	No
OSC: Disable Workflow Notifications CN_SFP_DISABLE_WF	Profile to disable Workflow Notifications being sent in Salesforce Planning (Default is No). If set to Yes, no notification will be sent to appropriate authority in the case of compensation plan submission, approval or distribution.				
OSC: Currency Code	Select a base currency.				

D.1 Moving from Forms to HTML Navigation

This version of Oracle Incentive Compensation uses an HTML user interface. The following road map is provided to help you determine the new navigation. The previous Forms and new HTML navigation are shown.

The following tables contain five columns. The first two list the Navigation and Screen Name in the 11.5.5 release. The third column details the changes made in the 11.5.6 and 11.5.7 releases. Columns four and five list the Navigation and Screen Name for 11.5.7.

D.1.1 Financial

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar - Financial > Set of Books	Set of Books	No change.	N/A	N/A
Menu bar > /Financial > Calendar	Accounting Calendar	No change.	N/A	N/A
Menu bar > Financial > Period Types	Period Types	No change.	N/A	N/A
Menu bar > Financial > Open Close Periods	Open and Close Periods	New navigation flow.	Administration > Compensation > Financial > Open and Close Periods	Open and Close Periods
Menu bar > Financial > Define Currencies	Currencies	No change.	N/A	N/A

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Financial > Define Currency Rates	Period Rates	No change.	N/A	N/A
Menu bar > Financial > Interval Types	Interval Type	New navigation flow.	Administration > Incentive > Interval Types	Interval Types
Menu bar > Financial > Accumulation Periods	Accumulation Periods	New navigation flow.	Administration > Incentive > Accumulation Periods	Accumulation Periods
Menu bar > Financial > Pay Periods	Pay Periods	New navigation flow.	Administration > Incentive > Pay Periods	Pay Periods
Menu bar > Financial > Credit Types	Credit Types	New navigation flow.	Administration > Incentive > Credit Types	Credit Types
Menu bar > Financial > Credit Type Conversion	Credit Type Conversion Factor	New navigation flow.	Administration > Incentive > Credit Conversion	Conversion Factors

D.1.2 System

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > System > System Parameters	System Parameters	New navigation flow. New HTML page fields related to integration with Oracle Payroll and Oracle Accounts Payable.	Administration > Incentive > Parameter	System Parameters
Menu bar > System > System Profiles	Find System Profile Values	No change	N/A	N/A
Menu bar > System > System Profiles	System Profile Values	No change.	N/A	N/A
Menu bar > System > Security Profiles	Security Profile	No change.	N/A	N/A
Menu bar > System > Lookups	Oracle Sales Compensation Lookups	No change.	N/A	N/A

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > System > Tables and Columns	Tables (with Columns tab)	New navigation flow. Columns tab moved to separate HTML page called Columns.	Administration > Incentive > Tables	Tables
Menu bar > System > Tables and Columns	Tables (with Columns tab)	New navigation flow. Columns tab moved to a separate HTML page called Columns.	Administration > Incentive > Tables > Columns	Columns
Menu bar > System > Tables and Columns	Tables (with Dimensions tab)	New navigation flow. Dimensions tab moved to a separate HTML page called Dimensions	Administration > Incentive > Tables > Dimensions	Dimensions
Menu bar > System > Tables and Columns	Tables (with Classification tab>	New navigation flow. Classification tab moved to separate HTML page called Classification	Administration > Incentive > Tables > Classification	Classification
Menu bar > System > Tables and Columns	Tables (with Primary Key tab)	New navigation flow. Primary Key tab moved to separate HTML page called Primary Key.	Administration > Incentive > Tables > Primary Key	Primary Key
Menu bar > System > Collections	Collection and Mapping (Collection tab)	No change.	N/A	N/A
Menu bar > System > Collections	Collection and Mapping (Mapping tab)	No change.	N/A	N/A
Menu bar > System > Collections	Collections	No change.	N/A	N/A
Menu bar > System > External Tables	External Table	New navigation flow. List of external tables is on a summary page called External Tables. Table details are on a page called External Tables - Join Conditions.	Administration > Incentive > External Tables	External Tables

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu Bar > System > External Tables	External Table	New navigation flow. List of external tables is on summary screen called External Tables. Table details are on a page called External Tables - Join Conditions.	Administration > Incentive > External Tables > Join Conditions	External Tables - Join Conditions
Menu bar > System > Flexfields	Descriptive Flexfield Segments	No change.	N/A	N/A
Menu bar > System > Flexfields	Segments Summary New	No change.	N/A	N/A
Menu bar > System > Collection Parameters	Collections Runtime Parameters	New navigation flow.	Administration > Collection > Runtime	Collection, Runtime Parameter

D.1.3 Tasks

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Tasks > Import Resources	Selection Criterion	Combined with Advanced Search HTML page.	N/A	N/A
Menu bar > Tasks > Define Resources	Find Resources	New navigation flow. Page is in HTML style.	Quick Find > Resource > Advanced Search	Advanced Search
Menu bar > Tasks > Define Resources > Find button	Resource Search Results	New navigation flow. Page is in HTML style. HTML page shows only employees; Search for nonemployees is through existing form.	Resource > Resources > Summary	Employees
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Roles tab)	No change, still in Forms.	N/A	N/A

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Groups tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Teams tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Service tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Interaction tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Compensation tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Receivables tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Miscellaneous tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Roles	Roles	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Groups	Define Groups (Members tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Groups	Define Groups (Roles tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Groups	Define Groups (Usages tab)	No change, still in Forms.	N/A	N/A

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Tasks > Define Groups	Define Groups (Parent Groups tab)	New navigation flow. Page is in HTML style.	Resource > Resources > Hierarchy	Group Detail - Child and Parent Groups
Menu bar > Tasks > Define Groups	Define Groups (Child Groups tab)	New navigation flow. Page is in HTML style.	Resource > Resources > Hierarchy	Group Detail - Child and Parent Groups
Menu bar > Tasks > Define Teams	Define Teams	No change, still in Forms.	N/A	N/A
Tasks > Adjustments	Maintain Transactions (Basic tab)	New navigation flow. Renamed field labels	Transaction > Adjustments > Search	Transaction Search
Tasks > Adjustments	Maintain Transactions (Advanced tab)	New navigation flow. Renamed field labels. Column display and sort selection.	Transaction > Adjustments > Personalize	Transaction Search
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Commission Lines tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Transaction History tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Customer Address tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (User Notes tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > Adjust Transaction button > Move Credits button	Maintain Transactions > Move Credits	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Tasks > Adjustments > Adjust Transaction button > Share Credits button	Maintain Transactions > Share Credits	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > Adjust Transaction button > Deal Split button	Splits	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > Adjust Transaction button > Deal Move button	Deal Move	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Submit Calculation	Calculation Submission	New navigation flow. New fields. Notify log and find salesperson on Calculations tab.	Transaction > Calculate > Create	Create Calculation Submission
Tasks > Process Log > Find Processes	Process Log	New navigation flow. One field only.	Transaction > Calculate > Process Log.	Calculation Process Log
Tasks > Concurrent Request Set	Multiple Request Set	Does not exist in HTML.	N/A	N/A
Tasks > Process Log	Find	New navigation flow.	Transaction > Calculate > Process Log or Transaction > Collect > View Log	Calculation Process Log or Process Log
Tasks > Posting Details	Posting Details	New navigation flow. New UI. New fields.	Transaction > Payment > Total	Payrun Details
HTML UI > Reports	Reports	New navigation flow. New reports, renamed report, no Adjustments Report.	Transaction > Report	Reports
Tasks > Rate Dimensions	Rate Dimensions	New navigation flow. Add Update and Restore buttons.	Incentive > Rate > Rate Table Details > Create Rate Dimension	Create Rate Dimension

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Tasks > Run Concurrent Requests > Submit a New Request > Single Request	Single Request	New navigation flow. Exists in HTML Calculation, Loading, and Collection tabs.	Transaction > Calculate > Create or Transaction > Load or Transaction > Collect > Create	Create Calculation Submission or Load Transactions or Submit Collection Request
Tasks > Run Concurrent Requests > Submit a New Request > Request Set	Request Set	New navigation flow. Exists in HTML Calculation, Loading, and Collection tabs.	Transaction > Calculate > Create or Transaction > Load or Transaction > Collect > Create	Create Calculation Submission or Load Transactions or Submit Collection Request
Tasks > View Requests > Find Requests	Find Requests	New navigation flow. Exists in HTML pages under Search button.	All search buttons, for example Transaction > Collect > Search	Transaction Search
Tasks > User Notifications	Notify Log	Not replaced in HTML.	N/A	N/A

D.1.4 Salespeople

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
N/A	N/A	New navigation flow. New HTML page from Resource Manager. It has the ability to search for compensation groups based on certain search parameters.	Resource > Groups	Advanced Group Search

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Sales People icon > Navigator > View by Compensation Groups > select Compensation Group name	Compensation Groups	New navigation flow. The new HTML page lists all compensation groups satisfying your search criteria. List of Group members is found on the Group Detail screen	Resource > Groups	Groups
N/A	N/A	New page fro Resource Manager with more details on the group.	Resource > Groups > Group Name	Group Detail
Sales People icon > Navigator > View by Compensation Groups > select Compensation Group name > Admins button	Admin Details	No replacement.	N/A	N/A
Sales People icon > Navigator > View by Compensation Groups > select person's name.	Salespeople Workbench (Salesperson tab)	New navigation flow.	Resource > Resources > Pay Groups	Resource Detail, Pay Groups
Sales People icon > Navigator > View by Compensation Groups > select person's name > Sales Role tab	Salespeople Workbench (Sales Role tab)	New navigation flow. For the list of the compensation groups to which the selected person is assigned, see Resource Detail, Compensation Groups page.	Resource > Resources > Sales Roles	Resource Detail, Sales Roles
Sales People icon > Navigator > View by Compensation Groups > select person's name > Sales Role tab	Salespeople Workbench (Sales Role tab)	New page containing list of compensation groups to which the selected person is assigned.	Resource > Resources > Compensation Groups	Resource Detail, Compensation Groups
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab	Salespeople Workbench (Compensation Plans tab)	New navigation flow. For the list of plan elements of the compensation plan, click a compensation plan name.	Resources > Resources > Compensation Plans	Resource Detail, Compensation Plans

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab	Salespeople Workbench (Compensation Plans tab)	New page containing list of plan elements of the selected compensation plan.	Resource > Resources > Compensation Plans > Compensation Plan name.	Resource Detail, Compensation Plan
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button	Compensation Summary	New navigation flow.	Resource > Resources > Compensation Summary	Resource Details, Compensation Summary
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button > Compensation Summary > View Details button	Compensation Detail	No replacement.	N/A	N/A
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button > Compensation Summary > View Details button > Compensation Detail > View Performance button	Performance Summary	This information can be found in the Quota Performance Report.	Transaction > Report	Quota Performance Report
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button > Compensation Summary > View Sales Credit button	Sales Credit	This information can be found in the Transaction Details Report.	Transaction > Report	Transaction Details Report

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Sales People icon > Navigator > View by Compensation Groups > select person's name > Payment Plans tab	Salespeople Workbench (Payment Plans tab)	New navigation flow.	Resource > Resources > Payment Plans	Resource Details, Payment Plans
Sales People icon > Navigator > View by Sales Roles > select a Role	Define Sales Roles	New navigation flow. Page is in HTML style. List of Roles assigned to each compensation plan is found on Compensation Plan Details, Roles page. List of people assigned to a specific Role is not available on HTML page.	Incentive > Plan > Roles	Compensation Plan Details, Roles
N/A	N/A	New HTML page from Resource Manager.	Resource > Resources	Advanced Search
N/A	N/A	New HTML page from Resource Manager.	Resource > Resources > Advanced Search	Employees
N/A	N/A	New HTML page from Resource Manager	Resource > Resources > Advanced Search > Employees > employee name	Resource Detail
N/A	N/A	New HTML page from Resource Manager	Resource > Resources > Detail	Employee Hierarchy

D.1.5 Compensation Plans

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Compensation Plans icon > View by Compensation Plans > select a compensation plan	Compensation Plans	New navigation flow. Details of a compensation plan are found on the Compensation Plan Details HTML page.	Incentive > Plan	Compensation Plans

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Compensation Plans icon > View by Compensation Plans > select a compensation plan	Compensation Plans	New navigation flow.	Incentive > Plan > select a compensation plan name	Compensation Plan Details
Compensation Plans icon > View by Compensation Plans > select a compensation plan	Compensation Plans (Plan Elements tab)	New navigation flow.	Incentive > Plan > Plan Elements	Compensation Plan Details, Plan Elements
Compensation Plans icon > View by Compensation Plans > select a compensation plan > Salesperson Assign tab	Compensation Plans (Salesperson Assigns tab)	No replacement.	N/A	N/A
Compensation Plans icon > View by Compensation Plans > select a compensation plan > Sales Roles tab	Compensation Plans (Sales Roles tab)	New navigation flow.	Incentive > Plan > Roles	Compensation Plan Details, Roles
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element	New navigation flow.	Incentive > Element	Plan Elements
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (General tab)	New navigation flow.	Incentive > Element > select a plan element name	Plan Element Details
Compensation Plans icon > View by Plan Elements > select a plan element > Distribute Variables button	Plan Element Distributions	New navigation flow.	Incentive > Element > Plan Element Details > Distribute Variables button	Plan Element Details, Distribute Variables
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (Revenue Classes tab)	New navigation flow. For accelerators and transaction factors, see Plan Element Details, Accelerators page.	Incentive > Element > Plan Element Details > Revenue Classes	Plan Element Details, Revenue Classes
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (Revenue Classes tab)	New navigation flow.	Incentive > Element > Plan Element Details, Revenue Classes > Details button in the Factors column	Plan Element Details, Accelerators

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (Formula tab)	New navigation flow.	Incentive > Element > Plan Element Details > Details icon beside Formula field	Formula Details
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (Rate Tables tab)	New navigation flow.	Incentive > Element > Plan Element Details, Rate Tables	Plan Element Details, Rate Table
N/A	N/A	New HTML page.	Incentive > Element > Plan Element Details, Compensation Plans	Plan Element Details, Compensation Plans
Compensation Plans icon > View by Formula > select a formula	Formulas	New navigation flow.	Incentive > Element > Formulas	Formulas
Compensation Plans icon > View by Formula > select a formula > General tab	Formulas (General tab)	New navigation flow. Performance Measure expression now located on the Formula Details, Expressions HTML page.	Incentive > Element > Formulas > select a formula name	Formula Details
Compensation Plans icon > View by Formula > select a formula > Input tab	Formulas (Input tab)	New navigation flow. Details of the expression are on the Calculation Expression Details HTML page.	Incentive > Element > Formulas > select a formula name > Expression	Formula Details, Expressions
Compensation Plans icon > View by Formula > select a formula > Rate Table tab	Formulas (Rate Table tab)	New navigation flow.	Incentive > Element > Formulas > select a formula name > Rate Table	Formula Details, Rate Tables
Compensation Plan icon > View by Formula > select a formula > Output tab	Formulas (Output tab)	New navigation flow. Details of the expression are on the Calculation Expression Details HTML page.	Incentive > Element > Formulas > select a formula name > Expression	Formula Details, Expressions
N/A	N/A	New HTML page.	Incentive > Element > Formulas > Plan Element	Formula Details, Plan Elements

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Compensation Plan icon > View by Rate Tables	Rate Tables	New navigation flow. See Rate Table Details HTML pages.	Incentive > Rate	Rate Tables
Compensation Plan icon > View by Rate Tables	Rate Tables	New navigation flow.	Incentive > Rate > select a Rate Table name	Rate Table Details
Compensation Plan icon > View by Rate Tables > select a rate table	Rate Tables	New navigation flow.	Incentive > Rate > Commission Rates	Rate Table Details > Commission Rates
N/A	N/A	New HTML page.	Incentive > Rate > Formula	Rate Table Details, Formula Assignments
N/A	N/A	New HTML page.	Incentive > Rate > Plan Element	Rate Table Details, Plan Element Assignments
Compensation Plan icon > View by Calculation Expressions	Calculation Expressions	New navigation flow.	Incentive > Expression	Calculation Expressions
Compensation Plan icon > View by Calculation Expressions > select an expression	Calculation Expressions	New navigation flow.	Incentive > Expression > select an expression name	Calculation Expression Detail
N/A	N/A	New HTML page.	Incentive > Expression > Formula	Calculation Expression Detail, Formulas

D.1.6 Payment Setup

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment Setup icon > View by Pay Groups > select a pay group	Pay Groups	New navigation flow.	Administration > Incentive > Pay Groups	Pay Groups

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment Setup icon > View by Pay Groups > select a pay group	Pay Groups (Pay Periods and Salespeople tabs)	New navigation flow. Information on both tabs in Forms has been combined into one HTML page.	Administration > Incentive > Pay Groups > Select pay group name	Pay Group Details
Payment Setup icon > View by Payment Plan > select a payment plan	Payment Plan	New navigation flow. To edit details, go to the Payment Plan Details HTML page.	Administration > Incentive > Payment Plan	Payment Plans
Payment Setup icon > View by Payment Plan > select a payment plan	Payment Plan	New navigation flow.	Administration > Incentive > Payment Plan > select payment plan name	Payment Plan Details

D.1.7 Classification Rules

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Classification Rules icon > Revenue Classes node > Revenue Class name	Revenue Classes	New navigation flow.	Administration > Incentive > Revenue Classes	Revenue Classes
Classification Rules icon > Classification Rules node > right click > New	Ruleset	New navigation flow.	Administration > Incentive > Ruleset	Rulesets
N/A	N/A	New HTML page showing a list of rules and their details.	Administration > Incentive > Ruleset details icon	Rules Hierarchy
Classification Rules icon > Classification Rules node > Ruleset name > Rules name	Rules (Rule Attribute tab)	New navigation flow.	Administration > Incentive > Ruleset details icon > Rules Hierarchy > Attributes hyperlink	Rule Attributes
Classification Rules icon > Classification Rules node > Ruleset name > Rules name > Build Expression tab	Rules (Build Expression tab)	New navigation flow.	Administration > Incentive > Ruleset details icon > Rules Hierarchy > Expressions hyperlink	Build Expression

D.1.8 Hierarchies

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Hierarchies icon > Hierarchies node > Customers	Hierarchies	New navigation flow. All hierarchies are listed on the summary HTML page called Hierarchies.	Administration > Incentive > Hierarchy	Hierarchies
Hierarchies icon > Hierarchies node > Customers > View Details	Hierarchies - Customers	New navigation flow.	Administration > Incentive > Hierarchy	Hierarchies
Hierarchies icon > Hierarchies node > Revenue Classes	Hierarchies	New navigation flow. All hierarchies are listed on the summary HTML page called Hierarchies.	Administration > Incentive > Hierarchy	Hierarchies
Hierarchies icon > Hierarchies node > Revenue Classes > View Details	Hierarchies - Revenue Classes	New navigation flow.	Administration > Incentive > Hierarchy	Hierarchies
Hierarchies icon > Hierarchies node > Trx Types	Hierarchies	New navigation flow. All hierarchies are listed on the summary HTML page called Hierarchies.	Administration > Incentive > Hierarchy	Hierarchies
Hierarchies icon > Hierarchies node > Trx Types > View Details	Hierarchies - Trx Types	New navigation flow.	Administration > Incentive > Hierarchy	Hierarchies

D.1.9 Payment and Reports in HTML

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment > Setups	Pay Element Mapping	New navigation flow.	Administration > Incentive > Payroll	Pay Element Mapping
Payment > Summary	Payrun Search	New navigation flow.	Transaction > Payment	Payrun Search

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment > Summary	Payrun Summary	New navigation flow.	Transaction > Payment	Payments
Payment > Summary > select a total	Payrun Details	New navigation flow.	Transaction > Payment > select a total	Payrun Details
Payment > Summary > Payrun Details > select a total	Payment Transactions	New navigation flow.	Transaction > Payment > Payrun Details > select a total	Payment Transactions
Payment > Summary > Payrun Details > select Add a Payment Plan	Payment Plans	New navigation flow.	Transaction > Payment > Payrun Details > select Add a Payment Plan	Payment Plans
Payment > Create	Create Payrun	New navigation flow.	Transaction > Payment > Payment Search > Create Payrun	Create Payrun
Payment > Reports	Payment Reports	No longer available.	N/A	N/A
Payment > Reports > Commission Summary	Commission Summary Report	New navigation flow.	Transaction > Report > Commission Summary Report	Commission Summary Report
Payment > Reports > Payrun Signoff	Payrun Signoff Report	No longer available.	N/A	N/A
Reports > Compensation	Summary of Compensation Reports	New navigation flow.	Transaction > Report	Summary of Compensation Reports
Reports > Compensation > Year To Date Summary > Salespeople Search Results > Salesperson Name	Year to Date Summary	New navigation flow.	Transaction > Report > Year to Date Summary	Year to Date Summary
Reports > Compensation > Transaction Details Report > Salespeople Search Results > Salesperson Name	Transaction Details Report	New navigation flow.	Transaction > Report > Transaction Details Report	Transaction Details Report

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Reports > Compensation > Compensation Group Hierarchy Report > Salespeople Search Results > Salesperson Name	Compensation Group Hierarchy Report	New navigation flow.	Transaction > Report > Compensation Group Hierarchy Report	Compensation Group Hierarchy Report
Reports > Compensation > Classification Rules Search > Rules Found > Rule Name	Classification Rules Report	New navigation flow.	Transaction > Report > Classification Rules Report	Classification Rules Report
Reports > Compensation > Commission Summary Report	Commission Summary Report	New navigation flow.	Transaction > Report > Commission Summary Report	Commission Summary Report
Reports > Compensation > Quota Performance	Quota Performance Report	New navigation flow.	Transaction > Report > Quota Performance Report	Quota Performance Report
Reports > Compensation > Commission Statement Report > Salespeople Search Results > Salesperson Name	Commission Statement	New navigation flow.	Transaction > Report > Commission Statement	Commission Statement Report
Reports > Compensation > Unprocessed Transactions > Salespeople Search Results > Salesperson Name	Unprocessed Transactions	New navigation flow.	Transaction > Report > Unprocessed Transactions	Unprocessed Transactions

D.1.10 Salesforce Planning/Incentive Planning in HTML

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Salesforce	Resource Search	New navigation flow.	Resource > Planning	Resource Search
Salesforce	Resource Search Results	New navigation flow.	Resource > Planning	Resource Search Results

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Salesforce	Resource Details - Main	New navigation flow.	Resource > Planning	Resource Details - Main
Salesforce	Resource Details - Job Titles	The select field for Job Titles is on the Resource Details - Main page. Job Titles is in a separate, smaller browser window.	Resource > Planning	Resource Details - Job Titles
Salesforce	Resource Details - On Target Earnings	On Target Earnings is a field in the Job Titles section of the main page.	Resource > Planning	Resource Details - Main
Salesforce	Resource Details - Customized Anchors	Customized Anchors is a field in the Job Titles section of the main page.	Resource > Planning	Resource Details - Main
Quota > Allocate	My Compensation Groups	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups	My Compensation Groups
Quota > Allocate	Quota Modeling Summary	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click name in Name column to drill down	Quota Allocation Details
Quota > Allocate	Add To-be-hired	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click on Add Vacancy button	Add To-be-hired
Quota > Allocate	contract	New navigation flow.	Quota > Allocate > Allocate Contract	Allocate Contract

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Quota > Allocate	Assign Quota	New navigation flow. New screen name.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click value in Name column drilldown > Allocation Details	Allocation Details - Quota and Pay Assignment
Quota > Allocate	Quota from Field	New navigation flow. New screen name.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click value in Name column drilldown > Allocation Details	Allocation Details - Quota and Pay Assignment
Quota > Allocate	Compensation Plan History	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click value in Plan Status column drilldown >	Compensation Plan History
Quota > Approve	Approve Contracts	New navigation flow.	Quota > Approve > Contract Approval	Contract Approval
Quota > Distribute	Distribute Contracts	New navigation flow.	Quota > Distribute > Salesperson Search > Salesperson Found	Distribute Contract
Quota > Activate	Activate Contracts	New navigation flow.	Quota > Activate > Salesperson Search > Salesperson Found	Compensation Plan Activate
Reports	Reports	New navigation flow.	Quota > Report	Reports
Reports	Resources Found	New navigation flow.	Quota > Report > Quota Model Summary (or any other report name) > Salespeople Search > Resources Found	Resources Found
Reports	Quota Modeling Summary	New navigation flow.	Quota > Report > Quota Model Summary > Salespeople Search > Resources Found > click name in Name column drilldown	Quota Model Summary

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Reports	Average Quota Summary	New navigation flow.	Quota > Report > Average Quota Summary > Salespeople Search > Resources Found > click name in Name column drilldown	Average Quota Summary
Reports	Overassign Quota Summary	New navigation flow. New report name.	Quota > Report > Overassign Quota Summary > Salespeople Search > Resources Found > click name in Name column drilldown	Quota Over assignment Report
Reports	Quota Range Summary	New navigation flow. New report name.	Quota > Report > Quota Range Summary > Salespeople Search > Resources Found > click name in Name column drilldown	Quota Range Report
Reports	Compensation Contract Status	New navigation flow.	Quota > Report > Compensation Contract Status > Salespeople Search > Resources Found > click name in Name column drilldown	Compensation Contract Status
Reports	Overlay Summary	New navigation flow. New report name.	Quota > Report > Overlay Summary > Salespeople Search > Resources Found > click name in Name column drilldown	Overlay Report
Reports	To-be-hired Summary	New navigation flow. New report name.	Quota > Report > Vacancy Summary > Salespeople Search > Resources Found > click name in Name column drilldown	Vacancy Report

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Reports	Transitional Salespeople Summary	New navigation flow. New report name.	Quota > Report > Transitional Salespeople > Salespeople Search > Resources Found > click name in Name column drilldown	Transition Report
Reports	Plan Status	New navigation flow. New report name.	Quota > Report > Plan Status > Salespeople Search > Resources Found > click name in Name column drilldown	Plan Activation Status Report
Reports	Role to Compensation Plan Mapping	New navigation flow. New report name.	Quota > Report > Role to Compensation Plan Mapping > Salespeople Search > Resources Found > click name in Name column drilldown	Role to Compensation Plan Mapping Report
Setup > Sales Roles	Sales Role Summary	New navigation flow. New screen name.	Incentive > Agreement	Agreements
Setup > Sales Roles > select a role	Sales Role Detail	New navigation flow. New screen name.	Incentive > Agreement	Agreement Details
Setup > Sales Roles > Sales Role Detail > role name hyperlink	Configure Contract Text	New navigation flow. New screen name.	Incentive > Agreement > name hyperlink	Agreement Details - Contract Text
Setup > Sales Roles > Sales Role Detail > edit formula hyperlink	Edit Computed Component Formula	New navigation flow. New screen name.	Incentive > Agreement > edit formula hyperlink	Agreement Details - Contract Text
Setup > Sales Roles > Sales Role Detail > define anchors hyperlink	Define Quota Anchors	New navigation flow. New screen name.	Incentive > Agreement > define quota anchors hyperlink	Agreement Details - Variable Pay, Computed Components, Rates
Setup > Components	Components	New navigation flow. New screen name.	Administration > Incentive > Components	Quota Components
Setup > Attainment	Attainment Schedules	New navigation flow. New screen name.	Administration > Incentive > Attainment	Attainment Schedule Summary

11.5.5			11.5.7	
Navigation	Screen Name	Changes	Navigation	Screen Name
Setup > Job Titles	Job Titles	New navigation flow.	Administration > Incentive > Job Titles > search for name and drill down on value in Name column	Job Titles
Setup > User Access	User Access	New navigation flow.	Administration > Incentive > User Access	User Summary
Setup > User Access > select a name	User Access Details	New navigation flow.	Administration > Incentive > User Access > click value in Name column drilldown	User Access Detail
Setup > Plan Text	Plan Text	New navigation flow. New screen name. New field enables you to select a transaction calendar.	Administration > Incentive > Settings	Settings
Setup > Activate Roles	Role Activation	New navigation flow.	Incentive > Activation	Role Activation

Responsibilities

E.1 Responsibilities in Oracle Incentive Compensation

People are assigned different responsibilities in Oracle Incentive Compensation to allow them appropriate access to the application. Those responsibilities changed for the 11.5.6 version of Oracle Incentive Compensation. The seven responsibilities in this 11.5.7 version of the product are listed below, with responsibilities for 11.5.5 listed to the right. One responsibility is not carried over: Sales Compensation Analyst.

Oracle Incentive Compensation 11.5.7 (HTML)	Oracle Sales Compensation 11.5.5 (Forms and HTML)
Incentive Compensation Super User	Sales Compensation Super User (Forms)
Incentive Compensation Payment	Sales Compensation Online Super User (HTML)
Incentive Compensation Reports	Sales Compensation Online Analyst (HTML)
Incentive Planning Analyst	Salesforce Planning Super User
Incentive Planning Contract Approver	Salesforce Planning Contract Approver
Incentive Planning Finance Manager	Salesforce Planning Finance Manager
Incentive Planning Sales Manager	Salesforce Planning Sales Manager
<i>Discontinued in OIC 11.5.6</i>	Sales Compensation Analyst

E.1.1 Tab Usage in Oracle Incentive Compensation 11.5.7

The table below shows the tabs in Oracle Incentive Compensation, along with their subtabs. If a responsibility has access to a tab, the word Yes appears in the column below its name.

Responsibilities in Oracle Incentive Compensation

Tab Name	Subtab Name	IC Super User	IC Payment	IC Reports	IP Analyst	IP Contract Approver	IP Finance Manager	IP Sales Manager
Home	Home	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	News	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Tools	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Incentive	Agreement	Yes			Yes			
	Activation	Yes			Yes			
	Plan	Yes			Yes			
	Element	Yes			Yes			
	Formula	Yes			Yes			
	Rate	Yes			Yes			
	Expression	Yes			Yes			
Modeling	Agreement	Yes			Yes			
	Comparison	Yes			Yes			
	Performance	Yes			Yes			
Resource	Planning	Yes			Yes	Yes	Yes	Yes
	Resources	Yes			Yes	Yes	Yes	Yes
	Role	Yes			Yes	Yes	Yes	Yes
	Group	Yes			Yes	Yes	Yes	Yes
Quota	Allocate	Yes			Yes	Yes		
	Approve	Yes			Yes	Yes		
	Distribute	Yes			Yes		Yes	Yes
	Activate	Yes			Yes			
	Report	Yes			Yes		Yes*	Yes**
Transaction	Collect	Yes						
	Import	Yes						
	Adjust	Yes						
	Load	Yes						
	Calculate	Yes						

Tab Name	Subtab Name	IC Super User	IC Payment	IC Reports	IP Analyst	IP Contract Approver	IP Finance Manager	IP Sales Manager
Requests	Notify Log	Yes						
	Post	Yes						
	Payment	Yes						
	Report	Yes						
	Collection	Yes						
	Transaction	Yes						
	Calculation	Yes						
	Posting	Yes						
	Payment	Yes						
Admini- stration	All	Yes						

* Incentive Planning Finance Manager has access is set by Incentive Compensation Super User using the User Access page.

**Incentive Planning Sales Manager has access only to information regarding his direct reports.

Glossary

These are the terms most commonly used in Oracle Incentive Compensation.

Accelerators

Types of incentives that vary compensation. Payment accelerators are a multiplier on the compensation rate without affecting the quota. Quota accelerators work on sales credit, sometimes changing compensation amounts by moving calculation to a different tier in a rate table

Accumulation Period

The time interval during for which commissions are collected. For example, a salesperson can have an accumulation period of a month and a pay period of semimonthly.

Agreement

An agreement is an early stage of a compensation plan used in the planning area of Oracle Incentive Compensation. In the Modeling tab, incentive planners experiment with creating an agreement and assigning it to a role before defining details and associating a resource with a role in the Quota tab.

Application Programmable Interface (API)

A set of procedures to import or export information to and from Oracle Incentive Compensation.

Attainment Schedule

Attainment schedules enable planners to pay different levels of compensation depending on the percentage of attainment of a set sales goal. Attainment schedules are used in the Compensation Contract where earnings for each level of achievement are displayed.

Bonus

Incentive compensation typically paid for meeting a goal, including quantitative and qualitative goals.

Classification Rules

User defined categories used to classify sales transactions. The classified transactions are part of a classification ruleset. Classification rules vary greatly from one company to another, depending on the product or service provided and the different ways that salespeople are compensated.

Classification Ruleset

A group of classification rules assigned to a specific time period or location that sorts transactions into preset categories, so that they can be compared to revenue classes in a salesperson's compensation plan. Only one classification ruleset can be active at a time.

Collection

The process of collecting transactions from feeder systems into Oracle Incentive Compensation.

Compensation Group

A group of salespeople who share sales credit, directly or indirectly, when a sale is made. They are placed together in a *compensation group hierarchy* to accurately account for the payment of commission and sales credit. For example, at one company, when salespeople close a sale, they receive commission, their managers receive sales credit toward their quotas, territory sales managers receive sales credit from the manager's transactions, and territory sales consultants also receive indirect credit for performing consulting work that helped to close the business.

Compensation Plan

A collection of one or more modular plan elements used to calculate a compensation payment. One compensation plan is assigned to a sales role, which is then assigned to a salesperson. Some parts of a compensation plan can be customized for individual salespeople, such as a payment plan or pay group.

Concurrent Program

Concurrent programs run at the same time as other Oracle Incentive Compensation functions. For example, you can run a concurrent program to collect transactions from a transaction source while you are building compensation plans.

Credit Memo

A document generated when an invoice is fully or partially reversed. Credit memos are later collected and applied against transactions.

Dimension

Rate dimensions define the tiers that a rate table uses to apply rates. A dimension contains rate tiers to establish different levels of achievement to be compensated at different rates.

Direct Sales Credit

Sales credit directly assigned to a salesperson in a transaction in a feeder system, such as Order Capture or Order Management, or another nonOracle legacy system.

Draw

Draws are a mechanism to pay salespeople a minimum amount of compensation for a specified period of time. As part of the agreement with salespeople, this amount can be recoverable or nonrecoverable. You can define the period that the draw and recovery will be in effect.

Formula

A set of instructions that determines how compensation will be calculated. Formulas are built from input expressions, output expressions, and rate tables.

Indirect Sales Credit

Credit inherited by a salesperson according to his or her place in the salesperson hierarchy. Indirect credit can roll up from a subordinate to a manager.

Interval

Intervals are time periods during which a compensation or a plan element is effective. Plan element intervals must be contained within the effective interval of a compensation plan.

Interval Type

The time period of the interval, for example, month, quarter, or year.

Job Title

Job titles are used by Human Resources to categorize employees. Oracle Incentive Compensation uses Roles, and a Job Title can be assigned to a particular Role by using the Job Titles page.

Manual Transaction

A user-entered transaction created for reversing or changing sales credit.

Mapping

Rules defining collection that connect the table columns of a feeder system to the transaction columns in Oracle Incentive Compensation.

Notification Log

The Notification log automatically records every change in the system that affects calculation and lists what part of the calculation must be rerun as a result of an event.

Pay Group

An assignment that determines the frequency with which a salesperson receives payment. A salesperson cannot belong to more than one pay group at a time.

Payment

There are three types of payment:

- Regular Payment: The application collects data, prepares it, and formats it to be used by a non-Oracle Payable system.
- Accounts Payable Integration: Used for vendors, this method prepares payment for Oracle Accounts Payable by classifying the resources as suppliers.
- Payroll Download File: The application collects data and creates a file that can be used by Oracle Payroll

Payment Plan

An arrangement in affect for some salespeople who need to receive a minimum payment regardless of their earnings. You can specify a minimum and/or a maximum payment as well as whether any minimum payments are recoverable or not against future amounts payable. Payment recovery can be on a separate schedule from the pay period.

Performance Measure

An accumulation of transaction values that is captured by a Plan Element and grouped for use in reports that compare achievements to Quota, Goal and Performance Measure. Performance measures are not used to calculate commission.

Plan Element

Parts of a compensation plan that may reflect variations of commission or perhaps a bonus based on the accumulated achievement of the salesperson. Plan elements can also be configured for tracking nonmonetary credits such as managerial points or production credits. Plan elements consist of modular components that can be freely assigned in different combinations, including revenue classes, formulas, and rate tables.

Push

Push is a way of referring to the movement of an approved and accepted compensation plan from the planning area into the administrative area of Oracle Incentive Compensation.

Rate Table

Part of a formula, along with input and output expressions, that determines the amount of compensation based on amount or percentage of achievement compared to quota.

Regoaling

A new functionality that enables managers to change the quota or variable pay of a salesperson's compensation plan at any time. These changes could be required because of a change in business circumstances, a salesperson is receiving too much or too little commission, or if a salesperson receives a promotion to a new role with a new goal. Regoaling can only be used if a plan is already accepted and activated.

Revenue Class

A user-defined category of business revenue used to classify a transaction for compensation and calculation. Revenue classes are assigned to plan elements and help Oracle Incentive Compensation determine whether classified sales credit is applied toward a compensation payment.

Revenue Class Rules

One or more conditions a revenue class must meet to classify into a given revenue class.

Revenue Class Hierarchy

An arrangement of revenue classes and subclasses in which the broadest classes are at the top of the structure. Classified transactions are

Role

A role describes a set of salespeople who share a common compensation structure. Examples are Salesperson, Consultant, and Regional Sales Manager. In Oracle Incentive Compensation, you assign each individual salesperson to a predetermined role, which can be customized in some ways. Changes to a role affect everyone assigned to that role who does not have the "Customized" check box checked on the compensation plan. A resource can have more than one role at the same time.

Sales Credit

An amount of revenue or nonrevenue credit that is awarded to a salesperson.

Seasonality

Seasonality schedules show how a product/service income or cost/expense is distributed throughout the year, expressed in percentages of the year's total. Seasonality schedules can be assigned to multiple agreements, and agreements can use multiple seasonality schedules for different components.

Takeback

The amount of compensation credited for a sale that Oracle Incentive Compensation takes back when the invoice due date grace period is exceeded. If the invoice is subsequently paid, then a giveback can be used to restore credit to a salesperson. Takebacks are sometimes called clawbacks.

Transaction Calendar (Workday Calendar)

A calendar that can be defined to contain only workdays and exclude weekends and holidays. The workday calendar is a type of transaction calendar. A calendar's duration can be defined to match the organization's financial year. A new workday calendar can be assigned every year as the dates of holidays and weekends will differ.

Transaction Factor

A multiplier on sales credit that determines net sales credit given for each type of transaction.