

# Oracle® Incentive Compensation

Concepts and Procedures

Release 11*i*

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## Oracle Incentive Compensation Concepts and Procedures, Release 11i

Part No. A90475-02

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# Preface

## Audience for This Guide

Welcome to Release 11*i* of the Oracle Incentive Compensation Concepts and Procedures. 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 information you need to understand and use Oracle Incentive Compensation. The bulk of the information was written to be used as contextual online help. Therefore, it is not presented in a hierarchical structure, and navigation paths are not given.

- The Understanding section covers the major concepts and features of Oracle Incentive Compensation. The section includes an overview, new features in this release, and discusses the HTML user interface.

- The Using section presents specific instructions on how to perform the functions of Oracle Incentive Compensation. It is task oriented, and gives prerequisites and lists numbered steps for each procedure. The tasks are presented in the order they appear by tab and subtab in the graphical user interface.

## 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/>.

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## 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 Implementation Guide**

This guide contains the steps you need to install Oracle Incentive Compensation at your site. Appendices contain detailed tables of flexfields, lookups, profile options, and responsibilities. And, a road map is provided to help users who are upgrading from a previous release to navigate in the HTML interface.

### **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 11*i*. You cannot upgrade to Release 11*i* 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 Oracle<sup>®</sup> 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.



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# Understanding Oracle Incentive Compensation

This topic group provides an overview of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

## Overview of Oracle Incentive Compensation

Whether your organization is a start-up or a global enterprise, Oracle Incentive Compensation provides a unique online application for the design, distribution, and administration of variable compensation plans. Based on logic that can be configured or modified by an end user, the application determines:

- What events are eligible for incentive payments
- Who should receive credit
- How the credits are calculated and paid

Oracle's end-to-end Internet strategy ensures that everyone who needs to work with incentive information can do so online as part of a single, coherent system of compensation management. For example, the Sales Planner can configure new plans and allocate quota to the sales organization in collaboration with finance, marketing, and sales management. The resulting plans can be seamlessly rolled out to the sales force for online approval. When the sales force accepts, the new plan can be activated for commission processing in the application.

The application controls the ongoing task of determining incentive payments from incoming transactions. The first step in this process is collecting transactions from a source system. The Open Collections feature supports transaction information from any source, including legacy systems, provided that the other system's data can be

accessed in the same database instance. This is in addition to the collection abilities from the out-of-the-box integration with Oracle ERP systems, Order Management, and Receivables.

A typical compensation plan consists of one or more modular components, or *plan elements*. Plan elements may reflect variations of commission or perhaps a bonus based on the accumulated achievement of the sales agent. Plan elements can also be configured for tracking nonmonetary credits such as managerial points or production credits.

All modular components used in the system can be configured and reused in different combinations. Taking full advantage of this capability simplifies system configuration as well as administration. For example, from a relatively small library of plan elements, you can configure many compensation plans.

Plan elements consist of modular components that can be freely assigned in different combinations. These underlying components have several distinct functions:

- *Revenue Class* is used to classify a bundle of classification rules that establishes the event eligible for compensation and the basis of calculation.
- A *Formula* determines how the compensation will be calculated.
- A *Rate Table* is part of a formula that determines the rate at which achievements are commissioned.

The Oracle Incentive Compensation Payment process enables the application to process all the calculated transactions and complete payment. A Payment Plan can be in affect for some members of the sales force who need to receive a minimum payment regardless of their earnings.

Prepare your pay run for each pay group when due, adjust the calculated pay as needed, and submit the pay run to be paid. Use this procedure to edit scheduled compensation, hold payment on a transaction, and submit for 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

Pay Group assignment determines the frequency with which a salesperson receives payment. You exercise control over the total amounts paid to salespeople through Payment Plans. 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. In addition, there is control over commission payment for each transaction by a salesperson. Payments to non employees such as agents, brokers, and suppliers are automatically posted to Oracle Payable Invoice Interface Table.

In addition to timely and accurate transaction processing, Oracle Incentive Compensation serves as a feedback mechanism for the sales organization and management through compensation and performance reports.

Granting online access to all professionals involved in compensation management, such as sales planners, sales analysts, and internal and external salespeople, creates a large, collaborative community of stakeholders who can both use and contribute real-time information about incentive systems. Oracle Incentive Compensation supports a wide variety of sales relationships and alternative sales channels, letting sales representatives and managers access and view compensation information over the Web. You can use the Year to Date Commission Summary Report to look at achievements for each period until the current period in a given fiscal year. The report also has a summary of payments made and outstanding balance for a given salesperson. Salespeople can analyze their own performance and sales managers can measure their teams' performance using the Quota Performance report.

## 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 (See [HTML Navigation](#)). 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 change to HTML also means that the familiar 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

## 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.

## 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 list. Select a category, such as Elements or Formulas, from the drop-down list to display the choices for that category.

## 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 Incentive 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 agreement versions.

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.

## 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 compensation groups to which a logged in user is a member. It also displays details about those groups. 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.

## 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.

## The Transaction Tab

The Transaction tab provides nine subtabs: 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 using Excel spreadsheets. 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 Administration reports formerly found in HTML under the Setup tab in the Payment responsibility.

## 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.

## 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.

## 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:

Parameters - 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 Plans** - 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.

## 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.

## 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.

## 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 Detail 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. Click the Adjust Quota button.
12. Click **Update**.

The Resource Details - Quota Adjustment page appears.

13. Click 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 Salespeople Search page to find the salesperson you need. The Salespeople Found 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**.

## 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.  
The Collection Submission - View Request Status page appears.
2. Click the Submit Request link.
3. The Collection Submission - Submit Request page appears.
4. Be sure that Collect Invoices is showing in the Collection Type field. If it is not, select it from the drop-down menu.
5. Enter a start date and end date for the month that the invoices were posted to General Ledger.
6. Click **Submit Request**.
7. Click the Adjust subtab.  
The Transactions page appears.
8. Query the invoice number and verify the split percentages.

9. Query for the date of the credit memo.  
The transaction amount, direct resource name and split percentage are displayed.
10. Query the invoice and change the split percentage for the sales credit to the new resource.
11. 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.
12. 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.
13. Delete the resource you want to take out and add the new resource in his or her place.
14. A reversal will be created for the old resource and the new resource will appear.
15. 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. This means that changes made to the invoice type transaction will not be automatically applied to the credit memo transaction. Update the attribute column for the credit memo transaction if necessary.

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.

## 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 > Incentive > Payment Plan). 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.

See [Defining Payment Plans](#) for more details.

## 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. See [Imports Introduction](#) to perform this procedure.

## 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.

## 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 Roadmap* 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 the tab or subtab 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 list and an Advanced Search link. Many pages provide a wildcard search and drop-down lists 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

## How Oracle Incentive Compensation Relates to the E-Business Suite

Oracle Incentive Compensation shares modules and exchanges information with other applications in the Oracle e-Business Suite.

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

Oracle Resource Manager provides information about salespeople, whether they are employees or non-employees, compensation group hierarchies, and roles. Part of CRM Foundation modules.

Oracle Sales Online and Oracle Partners Online provide a mechanism to the sales force to estimate their commission based on their current compensations plans. This capability is in the Income Planner under the Compensation tab in Oracle Sales Online.

Compensation information can be made available to Oracle Sales Intelligence.

## Incentive Planning

The objective of Incentive Planning is to steer sales force effort towards achieving the organization's sales target through compensation plans. Sales Force Planning helps to automate the sales budgeting process by giving salespeople a tool to communicate their quota estimate to their sales managers. Sales managers can then allocate a quota based on their direct salespersons' estimates. Sales Force Planning generates compensation plans with quotas based on sales managers' quota allocation and track the approval process. Sales managers can apportion quotas between departing directs and new hires. Incentive Planning Contract Approvers can review and approve compensation plans, and then Incentive Planning Finance Managers can then pass the approved compensation plans to Oracle Incentive Compensation Administration for commission processing.

In addition, Incentive Planning analysts are able to assign new sales roles to salespeople and move salespeople to other compensation groups. There are reports to locate those salespeople with quotas outside a value range for senior management control purposes and also there are reports to calculate the quota over assignment percentages between each level of sales management hierarchy. Quota over assignments are quotas that are allocated to subordinate salespeople from a manager that add up to more than 100 percent of the manager's quota.

## Understanding Compensation Plans

The following information explains how you can use compensation plans to correctly compensate and provide incentives for your salespeople:

[What Is a Compensation Plan?](#)

[Purpose of Compensation Plans](#)

[Using Compensation Plans](#)

### What Is a Compensation Plan?

The conditions that control incentive compensation are defined in a **compensation plan**. A compensation plan captures your organization's unique practices for paying compensation, with individual rules that determine commission and track achievement.

You have complete flexibility to create incentive compensation plans that you can customize for your company's unique sales situations. You can:

- Create as many compensation plans as you need

- Customize existing plans for individual sales representatives or situations
- Build compensation plans using calculation expressions, rate tables, formulas, and other building blocks from existing compensation plans
- Control the validity of all aspects of the compensation plan using precise start and end dates

## Purpose of Compensation Plans

A compensation plan is a set of elements governing the compensation payments to a salesperson. Using compensation plans, you can:

- Determine commissions, bonuses, and nonmonetary compensation
- Provide incentives to salespeople to achieve specific and measurable sales goals, including yearly and periodic sales targets, as well as sales targets for individual sales categories. Sales categories are defined in Oracle Incentive Compensation as a hierarchy of revenue classes, which are often based on product or service types, but can also be based on factors like target markets, industry, or customer account.
- Vary compensation rates based on user-defined measures, such as quota achievement, gross sales, and unit sales
- Vary quotas or compensation rates based on the revenue class hierarchy
- Stage compensation payment over the life of a sale
- Specify compensation accelerators for sales promotions
- Specify goals to track achievement for recognition programs
- Customize plans for individual salespeople
- Specify plan changes to occur on specific dates

## Using Compensation Plans

A compensation plan relates to a sales role within your organization. Different roles require different pay components, and therefore different compensation plans.

In a sales organization that has highly varied tasks, much overhead is required to create a different compensation plan for every salesperson. To avoid overhead costs associated with maintaining a large number of plans, you can create a set of compensation plans that target general compensation needs for most of your sales

force, then adjust individual quotas, goals, accelerators, and compensation rates when you assign the plan to a sales role.

As you build a variety of plans for your sales force, remember that you can assign a formula to more than one plan element, and you can assign a plan element to more than one compensation plan.

## Quota Assignment

In this section, you will read about:

- [Overlay salespeople](#)
- [Quota distribution techniques](#)
- [Overassignment percentages](#)

### Overlay Salespeople

Checking the overlay check box enables you to segregate your salespeople into either overlay salespeople or nonoverlay salespeople.

Overlay salespersons' quotas are excluded from the over assignment percentage calculations. Some organizations define overlay as nonrevenue sales credits. The term "nonrevenue sales" indicates that the value is not posted to General Ledger. Consider the following example.

The Account Manager and the Hardware Salesperson of a company are the direct participants and they are responsible for closing the sale. The Business Development Manager is considered an overlay salesperson because he or she made contact with the customer on more general sales activities but was not responsible for price negotiations for example, that is specific to this sale. If the sale value is 10,000, an extract of the transaction lines would look like this:

#### Revenue TypeSales Value

Account Managerrevenue6,000

Hardware Salespersonrevenue4,000

Business Development Managernonrevenue2,000

The Business Development Manager in the above example received 20% nonrevenue credit for the sale (2000/(6000+4000) is 20%). The manager’s commission on this sale will depend on the compensation plan rules and rate table that can be applied to the transaction upon calculation.

Overlay salespersons’ quotas are excluded from the over assignment percentage calculations. See Over Assignment Percentages section for explanation on over assignment percentages. This is so that sales management can view total sales revenue that the sales force plan to deliver.

## Quota Distribution Techniques

You can perform an initial distribution of quota by using the Quota Allocation Details page. There are several methods for allocating quotas:

- Even distribution of manager’s quota over immediate direct salespeople, with or without an overassignment
- Minimum Quota allocation as preset on the Sales Role Detail page
- Allocation to each direct salesperson a quota amount as much as the manager’s, with or without an overassignment

## Overassignment Percentages

The table below shows a manager’s quota and how the manager can overassign the quota to his subordinates at a rate more than 100 percent.

	Hardware	Software	Main Revenue	Support Service	Total Quota	Overlay
Manager	3000	1000	4000	160	4160	No
Direct 1	1200	330	1530	75	1605	No
Direct 2	1200	330	1530	75	1605	No
Direct 3	1200	400	1600	80	1680	No
Direct 4	3000	1000	4000	160	4160	Yes

The Direct overassignment is 117.55%

Explanation of calculation:

Total quota excluding overlay is  $1605+1605+1680= 4890$

Manager's quota = 4160

Therefore, direct overassignment is  $4890/4160 = 1.1755$

This means that this manager has divided his or her quota to the subordinate salespeople plus 17.55% extra.

If any of these directs have subordinate salespeople and they in turn have quota as well, then a street level overassignment calculation will be performed. If the street level total quota is 5000, then the street level overassignment is  $5000/4160$ , or 120.19%.

Overassignment percentages exclude quota allocated to overlay salespeople, such as Direct 4, as they are regarded as nonprimary salespeople. See section on overlay salespeople for explanation of the term *overlay*.

## Quota Approval Process

This section covers:

- [Approval Sequence](#)
- [Workflow](#)

### Approval Sequence

After a quota is locked by the sales manager, the sales manager needs to generate the compensation plan. The compensation plan incorporates the quota allocated by the sales manager to the direct salesperson, calculates the commission rates based on the input of On-Target-earnings and quota, and incorporates the Terms and Conditions text. The electronic document as a whole is referred to as a contract.

Next, using Oracle Sales Online, the Contract Approver reviews the contract and either accepts or rejects it.

If the Contract Approver accepts the contract, then the sales manager distributes the contract to the direct salesperson using Oracle Sales Online. The salesperson, also using Oracle Sales Online, can then view, accept, and print the contract.

If the Contract Approver rejects the contract, then the sales manager needs to adjust the quota if that is the solution to the rejection. The approval process repeats after the sales manager locks the quota again.

## Workflow

Oracle Workflow must be installed so Sales Force Planning users can be notified by email to prompt the email receiver that an action is required to move along the approval process for the compensation plans. Sales Force Planning approval process has been captured in a Oracle Workflow definition file. This flat file is accessible after Oracle Workflow is installed. Refer to the Implementation Guide for instructions on how to customize workflow notification messages for Sales Force Planning.

## How Transactions are Compensated

You choose the source transactions, the orders, invoices, or customer payments on which to base your compensation payments. Transactions are classified based on business rules, into revenue classes. A revenue class is assigned to a **plan element**, a set of conditions a salesperson must meet to be eligible for compensation. For each revenue class assigned to a plan element, you need to specify how much compensation you want to award for each type of transaction you collect. Each sale corresponds to one or more transactions, depending on when during the life of the sale your organization pays compensation.

For each revenue class, you define transaction factors or multipliers for each type of transaction relevant to that class. Transaction factors help you stage **sales credit** (sales amount accredited to a salesperson) over the life of a sale, assigning percentages of the transaction amount to the events that are important to your sales organization.

When calculating the compensation payment, the sales credit is multiplied by the transaction factor you defined for that transaction type, resulting in **net sales credit** for the compensation transaction.

Transaction types supported by Oracle Incentive Compensation are listed below. They are automatically identified when collecting against an Oracle ERP system (Accounts Receivable, Order Management). For external sources, distinguish the transactions by populating this column before collecting into Oracle Incentive Compensation:

- **Order Booked:** The order is processed when it is booked and its status changes to booked.
- **Invoice:** The invoice is processed when posted to Oracle General Ledger. After it is posted, no changes can be made to the invoice.
- **Payment:** Payment is received in Oracle Receivables.

- **Take Back:** When the invoice due date grace period is exceeded, the amount of compensation credited for this sale is taken back.
- **Credit and Debit Memo:** An invoice is fully or partially reversed and posted to Oracle General Ledger.
- **Give Back:** A payment is received for a take back.
- **Manual Adjustment:** An adjustment is made.
- **Write Off:** A sale is written off the books for a variety of reasons and posted to Oracle General Ledger.

For all revenue reducing transactions, such as take backs and credit memos, the application creates a new transaction for a negative amount of the sales credit.

**Note:** The application does not check to see whether the salesperson(s) credited on the original invoice is the same salesperson(s) on the revenue reducing transaction. Therefore, it is possible to reduce a salesperson's commission on transactions for which he or she did not receive sales credit previously.

When you choose a particular transaction factor, you are specifying that you want to pay compensation based on the state of the compensation system at the time that transaction occurred. For example, if an organization chooses to pay 50% on order and 50% on invoice, one compensation payment is made based on the plan elements on the date of the order and the remaining payment is made based on plan elements on the date the invoice is posted.

## Revenue Classes

A **revenue class** is a user-defined category of sales for which your organization awards compensation. Each revenue class represents a different type of sale for which your organization pays compensation. Thus, different companies have different revenue classes because each sales organization awards compensation differently. By assigning revenue classes, you specify different ways in which each salesperson can earn compensation.

After defining your organization's revenue classes, you assign one or more revenue classes to a plan element and assign the plan element(s) to a compensation plan.

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

- Your sales organization can have customer account teams, where salespeople only receive compensation for sales to their assigned set of accounts. In this case, each customer account can be a separate Oracle Incentive Compensation revenue class.
- Your company can organize its sales strategy around expansion into new markets, where each new market can be a separate revenue class.
- Your company can use product-based incentive compensation, paying compensation only for sales made in a salesperson's assigned set of products.

For example, an organization 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 authorized to sell only 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.

## Hierarchy Terminology

While the functions of hierarchies differ, the concepts and terminology used are the same for all hierarchies.

The term ***dimension*** refers to a named and defined type of hierarchy. As many hierarchies as needed can be created for each dimension. However, only one hierarchy per dimension can be effective at any given time.

A dimension is a high-level hierarchy type that is based on a table, which must be defined in Oracle Incentive Compensation. A dimension can be used

- To create a hierarchy that you use to define rules, or
- To hold the primary and foreign key links between Oracle Incentive Compensation and other tables

Oracle Incentive Compensation provides one default dimension: Revenue Classes. Create as many dimensions as you need, for example, for product code or customer, to use for referencing in defining the rules classification. To define a dimension, these criteria must be met:

- The dimension must be based on an existing table in the database.
- There can be only one dimension per base table.
- The table must be defined in Tables in Oracle Incentive Compensation.

- The database table must have either a numeric primary key assigned or have no primary key and numeric columns in the table.
- Table information defined in Tables must accurately describe the table.

## Classification Rules

Classification rules are used by Oracle Incentive Compensation to determine how transactions are classified as they enter the application from a feeder system. Each rule contains one or more conditions. These conditions specify the characteristics a transaction must have to classify into a given revenue class. Each rule is associated with a revenue class. During commission calculation the revenue class is assigned to a transaction when it passes all conditions in the rule. The transaction attribute value expresses each condition.

For example, an organization awards compensation based on the type of products or services sold, thus defining a transaction attribute for product code. This transaction attribute is represented in the compensation transaction tables as the column `PROD_TYPE`. To determine whether to award consulting revenue, the organization checks whether the product code is `CON`. Vision creates a rule to check for this type of revenue. The rule has one condition: `PROD_TYPE = CON`.

Because the application classifies a transaction by checking values of specific transaction attributes, be sure to specify all attributes you need for classification when you set up transaction collection.

## How the Classification Rules Hierarchy Works

The following information explains the hierarchy of revenue classes classification rules and how transactions roll through the hierarchy to determine compensation:

[The Rules Hierarchy](#)

[Comparing Transaction Attributes with Revenue Classes Classification Rules](#)

[Multiple-Condition Rules](#)

[Changes](#)

## The Rules Hierarchy

When you define classification rules, notice the common conditions among the classification rules. For economy of expression and ease of maintenance, assign the common conditions once to the parent of rules that share the same conditions. For

example, the Standard Multimedia PC and the ATO Multimedia PC are in the same hierarchy and share the condition `Product_Code=MM`. This condition is specified once in the application for the parent rule of the two rules that differentiate Standard Multimedia PC and the ATO Multimedia PC.

## Comparing Transaction Attributes with Revenue Classes Classification Rules

The application uses rules in the hierarchy starting with the rule at the top, and moving down from left to right. When a compensation transaction passes a rule (all conditions are true), the application then compares the children of that rule, working left to right, until it finds a match. Then it looks at the children of that rule, and so on, until it reaches the bottom of the hierarchy, returning the revenue class of the last matching rule. After the classification process, the matching revenue class' name is marked on each transaction as an additional attribute.

## Multiple-Condition Rules

If *any* one of several conditions associated with a revenue class qualifies a compensation transaction to be assigned to a class when the condition is true, you can define multiple sibling rules in the hierarchy, one for each condition. Because the application evaluates other sibling rules if a transaction does not satisfy the first rule on a level in the hierarchy, the application processes these rules as if they were joined by an AND operator. When a transaction fails a rule, the application compares the transaction attributes with other sibling rules from left to right.

For example, suppose that an organization classifies products by ID number and decides to sell its products via telesales in addition to its existing direct channel. The organization can add a new rule:

- `PROD_TYPE BETWEEN 1201 and 1600` (existing condition or rule)
- `CHANNEL_TYPE is 03` (new rule)

Therefore, if a transaction's attributes satisfy *all* rules, then the transaction will classify against the revenue class. If the OR condition is used, then the transaction will classify against that revenue class if the transaction attributes meet *any* of the revenue class' rules.

If several revenue classes share multiple conditions, you can minimize data entry by creating a parent rule that includes the shared conditions, and by defining only the unique conditions as child rules.

## Changes

You can make changes to your revenue classification setup. You can add, change, or delete:

- Revenue classes
- Revenue classes in a hierarchy
- Rules in the classification rules hierarchy
- Conditions for a rule

## How Compensation Groups Work

The following information explains how hierarchies of compensation groups are used to compensate multiple salespeople for one sales transaction:

[Purpose of Compensation Groups](#)

[Credit Sharing](#)

### Purpose of Compensation Groups

A **compensation group** is a group of salespeople who share sales credit, directly or indirectly, when a sale is made. They are placed together in a 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.

In many sales organizations, multiple salespeople can receive sales credit for the same commission transaction. If you choose to compensate multiple salespeople for the same commission transaction, you use a compensation group hierarchy to specify the relationships among the credit receivers.

A salesperson can have more than one sales role and belong to more than one compensation group. For example, at one organization, sales representatives A, B, and C are in the same compensation group because their sales roll up to manager X. Manager X also belongs to a different compensation group that includes a separate group of salespeople who are working on another project.

A salesperson can have the same role in multiple groups, or multiple roles in the same compensation group. In either case, sales commission can be calculated with no problem. However, if a salesperson is in multiple compensation groups with

different roles, and another salesperson's transactions are set to roll up to him along multiple paths, the application may not be able to process the commissions correctly. See [Credit Sharing](#) or [Phases of Calculation](#) for more information on credit rollups.

## Credit Sharing

You can allocate sales credit for a commission transaction:

- To one or more of a salesperson's managers in an organizational hierarchy. This type of credit allocation is called a rollup, because the application rolls credit up within the sales organization.
- When transactions are processed, the manager(s) automatically receive all sales credit applied toward subordinate salespeople, provided that they have the same revenue classes as their subordinates. Therefore, the manager need not be named on the transaction.
- To peers of a salesperson. To enable Oracle Incentive Compensation to process a single transaction that credits more than one salesperson for a single transaction, each transaction that is fed from feeder system(s) must identify all the salespeople to be credited. Therefore, the system(s) must allow the user to create orders and/or invoices with many transaction lines, each line crediting a salesperson.

Salespeople need not be members of the same Compensation Group to share credit for the same transaction.

## How Data Collection Works

You can also read about:

- [Listing Notification](#)
- [Creating compensation transactions](#)
- [Updating compensation transactions](#)
- [Purging](#)

The Collections function of Oracle Incentive Compensation is responsible for collecting compensation transactions from different feeder systems, including AR, OM, and external sources, and storing them in an API table (CN\_COMM\_LINES\_API). The compensation transactions subsequently can be imported from this API table into Oracle Incentive Compensation. A compensation transaction is a record

which identifies a compensation event (such as the sale of an item). The main attributes of a transaction are the:

- Type of compensation event
  - Order
  - Invoice
  - Payment
  - Takeback
  - Giveback
  - Credit Memo
  - Manual
- Identity of the person who is directly credited for the event
- Value of the transaction

A transaction may optionally contain other attributes, such as transaction currency, product identification, and customer identification.

When compensation transactions are loaded into Oracle Incentive Compensation, they are stored in the CN\_COMMISSION\_HEADERS table. The columns in this table are direct equivalents of columns with the same names in CN\_COMM\_LINES\_API.

Collections allows you to collect compensation transactions from the Oracle Receivables and Oracle Quoting - Forms applications. These are known as Standard Transaction Sources. You can also create your own Transaction Sources from the database tables of any legacy applications that you wish. The process of setting up Collections to collect from a legacy system consists of the following components:

- **Source Tables.** Identify the tables from which the transactions are to be built.
- **Queries.** Specify how these tables are to be joined together and how appropriate rows are identified.
- **Mappings.** Specify how data from the Source tables are used to populate the destination fields in the compensation transaction.
- **Actions.** Specify filters to remove unwanted transactions, and extra logic to be incorporated into the collection procedure.

- **Collection Package.** Generate a collection package which will build compensation transactions based upon the setup from the previous steps, and will store those transactions in CN\_COMM\_LINES\_API.
- **Concurrent Program.** Collect transactions from the required transaction source whenever you want, by running a predefined Concurrent Program.

For example, assume that a Transaction Source is an Order database and that each order consists of an Order Header containing general information about the order, plus a set of Order Lines where each Line represents an ordered item. This information is stored in an Order Header table (L\_ORDER\_HEADERS) and an Order Line table (L\_ORDER\_LINES). In the Order system it is possible for a number of salespeople to receive credit for each Order Line. There is therefore also a Sales Credits table (L\_SALES\_CREDITS) to hold this information.

The end result of setting up Collections for a particular Transaction Source is a PL/SQL package that is stored in the applications database. The Collect procedure within this package builds compensation transactions from the Transaction Source and stores them in CN\_COMM\_LINES\_API. The Collect procedure executes the listing notification and the creation and updating of compensation transactions.

## Listing Notification

This feature makes a list of all individual transaction lines from the Transaction Source for which compensation is payable. The feature stores the unique identifier of each line in a Notification Table. In the example, the list of individual transactions is obtained by examining the Order Lines table, L\_ORDER\_LINES, and the unique identifiers of rows in this table are stored in the Notification Table.

## Creating Compensation Transactions

For each unprocessed individual transaction line identifier in the Notification Table, you can build as many compensation transactions as are required. In the example Transaction Source, it is necessary to join together the Order Lines and Sales Credits tables. Suppose there is a particular Order Line for which three salespeople earned credit. The Order Line identifier was stored in the Notification Table, but you need a join to the Sales Credits table to find out that three transactions need to be created and three salespeople must be identified.

The compensation transactions are created using a single SQL query. As a minimum, this query must join together all the tables necessary to decide the number of individual compensation transactions which are created from each line

item (L\_ORDER\_LINES and L\_SALES\_CREDITS in the example). The tables used in this query are referred to as the **Direct Mapping** tables.

## Updating Compensation Transactions

Suppose that you need to include the salesperson's territory identifier into each compensation transaction but this information is stored in a separate L\_TERRITORIES table. The key of this table is Salesrep\_ID. There are two ways that this information can be pulled into the compensation transaction.

- The first way would be to add a join to this table in the query that creates compensation transactions, thus making it a **Direct Mapping** table. This is a valid approach, but not always practical. For example, if not every salesperson has territory information, then you have to know how to make the join to this table an Outer Join, without which no compensation transactions will build for salespeople without territories. If you need your compensation transaction to contain 10 informational fields, all of which are sourced from different tables, the Collection Create query would have to join all these tables together, resulting in a query that is difficult to maintain and does not improve performance.
- You can set up Collections to delay populating territory identifier fields until after the initial creation of the compensation transaction. After the compensation transaction has been created and inserted into CN\_COMM\_LINES\_API, the territory identifier field is populated by a series of update statements. For example:

```
UPDATE cn_comm_lines_api SET attribute1 =
```

```
(SELECT territory_name FROM l_territories lte WHERE lte.salesrep_id =  
api.salesrep_id);
```

When a destination field in the compensation transaction is populated in this manner, it is known as an **Indirect Mapping**.

## Purging

There is no purge utility in this release of Oracle Incentive Compensation.

## Calculation

Calculation is a process used by the system to calculate commission and bonus plans for salespeople. This calculation section explains:

Types of Calculation

Phases of Calculation

Calculation Process

## Types of Calculation

- **Commission Incentive:** Transaction based compensation, based on formulas in a compensation plan.
- **Bonus Incentive:** Additional compensation based on aggregated transactions.

## Phases of Calculation

When you calculate a set of transactions, the application performs these steps:

- **Revert:** This feature restores the transactions within your specified parameters back to their original unprocessed state. When a full calculation is performed, the application deletes any system-generated (rollup) transactions and reverts the status of transactions to unprocessed.
- **Unprocessed:** The transaction has not been processed. The application displays a status for unprocessed transactions in transaction status.
- **Classification phase:** The application checks the revenue classification rules that have been defined for the affected transactions, and determines if the transactions were successfully classified. Using the classification rules you defined, the application is able to determine a unique revenue class for each transaction.
- **Failed Classification:** Indicates that the transaction did not have a matching revenue class. Be sure that you have defined and synchronized revenue classification rules before further investigation.
- **Rollup phase:** Oracle Incentive Compensation runs a process to determine all salespeople who should receive credit for this transaction based on the rollup date, and the salespeople hierarchy effective for that date. For every credit receiver, the application creates a new system-generated transaction for each manager entitled to a rollup credit.
- **Population phase:** Oracle Incentive Compensation identifies the appropriate plan elements that are associated with the revenue classes that have been matched with each transaction. The application updates each transaction with the plan element information.

- **Failed Population:** The transaction did not match the quota rules for the credited salesperson. Although the transaction had a matching revenue class, the credit salesperson did not have the revenue class assigned to his or her plan element.
- **Calculation Phase:** Based on the information gathered, Oracle Incentive Compensation performs calculation on all transactions for salespeople during the specified period.
- **Failed Calculation:** The transaction failed to be calculated. Oracle Incentive Compensation indicates a failed status for transactions that have failed the calculation phase in the transaction status. Check your calculation rules, ensure that your calculation expressions, rate tables (if applicable), plan elements, and compensation plans are valid.

## Calculation Process

Efficient calculation is accomplished by automatically recording in the Notify Log every change in the system that affects the calculation. The log also lists what part of the calculation is affected and therefore must be rerun as a result of the event.

For example, a new transaction is collected and all salespeople affected by that transaction are recorded in the log. Other examples of events include changes made to rate tables, compensation plans, and classification rules. The log also records the point where calculation needs to restart.

When you perform an incremental calculation, the application calculates everything in the notify log. For better performance, use the incremental calculation for your normal calculation needs.

You can choose to perform a full calculation to recalculate everything within a given date range. The full calculation takes longer than the incremental calculation.

## Payment

In Oracle Incentive Compensation, payment is a multistep process, but it is easier in this version of the application. Using the Requests tab places the functions you need in one place.

Payment in Oracle Incentive Compensation is made by creating payruns. The application does not actually pay people, but a list is created, which is then sent to Payroll.

To set up a payrun, first run the Posting concurrent program, accessible through Requests > Posting, or Transaction > Post.

Next, create a Payrun using Transaction > Payment. You can view and adjust the payment amount for each transaction, for each salesperson (Transaction > Payment > Payrun Details). Select a salesperson on the Payrun Details page to view or adjust the payment for that person.

When ready to pay, go to Transaction > Payment, search for the payrun, and Pay Payrun from the list. Run the Concurrent Request.

The CN\_POSTING\_DETAILS table is updated with pay information. Pay data for non employees go further when posted to the Oracle Payable Invoice Interface Table (user activation required).

In the previous version of Oracle Incentive Compensation, the application allowed holds and control payment to be applied to each transaction (Pay By Transaction). In this new version, the holds and control payment can be applied only to an aggregate transaction. The aggregation is done by plan element if the resource is an Employee or of type "other" and by liability and expense accounts if the resource is of type "Vendor".

## Using Multiple Currencies

Oracle Incentive Compensation can be viewed in different currencies and rolled up in functional currency. With the choice of multiple currencies, you can:

- Use a functional currency  
The functional currency is the currency that is used by the parent company, and is defined in the General Ledger set of books. The functional currency is used for calculation.
- Associate a currency for each salesperson  
The currency you associate with each salesperson is the **salesperson** currency, and all transactions credited to that salesperson can be reported in that currency.
- Handle different currencies at the transaction level  
Each transaction can have up to two currencies: transaction currency, which is the original currency in which the transaction occurred, and the functional currency.
- View salespeople's account balances in functional or salesperson currency.

For example, a Mexican national who works for a U.S. company can see reports in dollars (the company's functional currency) or in pesos (the salesperson currency) when using Oracle Sales Online.

- Run reports in any currency, one at a time.  
Commission statements and reports can be displayed in the transaction currency, the salesperson's currency, and the parent company's functional currency.

On January 1, 2002, the euro replaced 12 European Union currencies. However, since adjustments may be made in Oracle Incentive Compensation for previous transactions, the 12 discontinued currencies are still part of the application. The 12 replaced currencies are: Austrian Schillings (ATS), Belgian Francs (BEF), Dutch Guilders (NLG), Finnish Markka (FIM), French Francs (FRF), German Marks (DEM), Greek Drachmas (GRD), Irish Punt (IEP), Italian Lira (ITL), Luxembourg Francs (LUF), Portuguese Escudo (PTE), and Spanish Pesetas (ESP).

If your functional currency is one of the 12 European currencies replaced by the euro, be sure that your feeder systems perform conversions to functional currency satisfying the EU Triangulation Rules. The conversion applies only to transactions expressed in nonfunctional currency.

See General Ledger documentation for more information.

To associate a currency for a salesperson, perform the following procedure:

### **Prerequisites**

Log in as Incentive Compensation Super User.

### **Steps**

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

The Advanced Search page appears.

2. Enter the name of the resource in the Name field, or use some other search criterion, such as the Employee Number field.

To search, enter the first few letters of the name or digits of the number, followed by a percent sign (%), and click **Search**.

3. After the search results appear, click the name of the person for whom you want to see information.

The Employees page appears.

4. Click **Compensation Summary** in the side panel menu.
5. Enter the salesperson currency in the Compensation Currency field, or select it from the list of values. Click **OK**.
6. Save and close the form.

## Using Oracle Incentive Compensation

This topic group provides process-oriented, step-by-step instructions for using the application to perform essential business tasks.

## Agreements

This page lists Agreements that have been defined in Oracle Resource Manager.

A sales role describes a set of salespeople who share a common compensation structure. Examples are PC Salesperson, Education Salesperson, Consultant, and PC Regional Sales Manager. The Agreements page displays important basic information about each defined sales role

### Prerequisites

Sales roles must be created in Oracle Resource Manager.

### Steps

1. Enter a search parameter in the search field.
2. Click **Go**.  
A list appears of Agreements that match your search parameter.
3. Click a Sales Role name to go to the Sales Role Detail window.

## Sales Role Detail

Use this page to view or edit details of a Sales Role.

### Prerequisites

Sales Roles, Rate Tables, and Single Dimension Rate Tables must be created first. Components and Attainment Schedules must be created in Incentive Planning. Only single dimension rate tables are supported with Incentive Planning.

## Steps

1. If desired, use the Copy Role drop-down list to select a role from which to copy. Click **Apply**.
2. In the On Target Earnings field, enter the total earnings if a salesperson achieves 100% of quota.
3. Select the Club Eligible check box if this Role is entitled to Club participation on achieving Club rules.
4. 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.
5. In the Quota Minimum and Quota Maximum fields, enter the range of quota figures that this Role should have.
6. Input the Compensation Plan Level. For example, a street level salesperson will have Level 1.
7. Select an Attainment Schedule from the drop-down list that is applicable to this Role's Compensation Plan.
8. Select Fixed Pay Components and then enter ascending 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).
9. Select Variable Pay, Non Computed Components as in step 8:
  - 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 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
10. 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.
  11. 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.
  12. 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. Components with quotas additionally include an anchor column and a disable anchors check box. Click **Define** in the Anchors column to go to the [Agreement Details](#) page. Use anchors to indicate the maximum that can be earned at each tier of the rate table you selected.
  13. 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**

The contract text on the Sales Role Detail page is not updateable if the Customized check box is checked on the Resource Details - Main page.

Entering the Quota range enables the Quota Range Report to be run. The minimum quota on the Sales Role Detail page 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.

The Quota Maximum field information is not used in quota allocation. It is used only in the Quota Range Report.

Make sure that figures in the % of Total Quota column add up to 100 percent.

## 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 **Update** 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.

## 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 table must also be assigned to the component to which you want to apply anchor values.

## Steps

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:

<b>From</b>	<b>To</b>	<b>Expected Commission</b>
0	25%	To be calculated
25%	50%	To be calculated
50%	75%	To be calculated
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:

<b>% of Attainment</b>	<b>Type</b>	<b>Expected Commission</b>
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:

<b>From</b>	<b>To</b>	<b>Commission Rate</b>
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%)

$(150,000 - 100,000) / (50\% - 25\%) \text{ TQ}$

$50,000 / 25\% * \text{TQ} = 10$

3rd Tier (50% - 75%)

$(180,000 - 150,000) / (75\% - 50\%) \text{ TQ}$

$30,000 / 25\% * \text{TQ} = 6$

4th Tier (75% - 100%)

$(200,000 - 180,000) / (100\% - 75\%) \text{ TQ}$

$20,000 / 25\% * \text{TQ} = 4$

5th Tier (100% - 999%)

$(200,000 - 200,000) / (999\% - 100\%) \text{ TQ} = 0$

**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.

## Role Activation

Use this page to activate a role.

### Prerequisites

Role must already be created and mapped to a compensation plan. Quota components are mapped to plan elements.

### Steps

1. To activate a role, check the check box in the Activate column.
2. Click **Update**.  
A reason for failure will appear if your activation was unsuccessful.
3. If necessary, click **Restore** to return to the previously saved version.
4. If you wish to see the details of a role, click the role name in the Role Name column to go to the Sales Role Detail page.

## Agreement Details - Contract Text

Use this page to define the text that accompanies the Agreement. The text can be customized for each agreement version. This page, by default, displays the text definition from the Default Contract Text page.

### Prerequisites

Incentive Planning Analyst or Incentive Compensation Super User responsibility is required.

### Steps

1. Enter the title of the Contract at the Contract Title field.

2. Displayed Quotas area
3. Non Quota Components area
4. Enter the Eligibility Rules in the Club Qualification text box.
5. Check the Display Quota Amount check box
6. Attainment Table
7. Enter the Terms and Conditions of the Compensation Plan in the text box.
8. Enter the Approver's details in the Approver area.
9. Click **Update** to save new information.
10. If desired, click **Restore** to retrieve the last saved set of information.

### **Guidelines**

The text in the Terms and Conditions text box can be made to refer to the location of the Terms and Conditions. For example, "I accept the Terms and 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.

## **Defining Compensation Plans**

A compensation plan is built from plan elements and is assigned an effective start date and an effective end date. The plan can then be assigned to multiple sales roles. Compensation plans can be defined directly in Oracle Incentive Compensation or alternatively can be activated from an approved and accepted agreement in the planning area of Oracle Incentive Compensation.

In this version of Oracle Incentive Compensation, four pages are used to define compensation plans. The main page is called Compensation Plan. This page lists all compensation plans that are already defined. 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. The third page, [Sales Roles](#), is where the compensation plan is assigned to Sales Roles.

### Prerequisites

Plan elements and formulas must be created.

### Steps

1. 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.
2. 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. See [Search Saved Searches](#) for instructions on this procedure as it was done for plan elements.
3. To create a new compensation plan, click **Create**. This takes you to a blank Compensation Plan Details page.
4. Check the Remove check box to delete a compensation plan.
5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your work.

## 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:

### Prerequisites

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

### 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 necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your work.
7. Do not click **Validate** yet. Instead, click the Assign Plan Elements subheading to go to the [Assign Plan Elements](#) page. After assigning the plan elements, you can return to the Compensation Plan Details page to validate the new compensation plan.

### Guidelines

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.

## Assign Plan Elements

Perform the following procedure to assign plan elements to a compensation plan.

1. Enter the plan element name in the Name field. Click **Go** to open a pop-up list of available plan elements. Enter search parameters (at least four characters). Click your selection.
2. If you are using more than one plan element, place them in order by entering a sequence number in the sequence column using the drop-down list.
3. When you are finished, click **Update** to save the plan element assignment. The description, start date and end Date fields will populate automatically.
4. Optionally, you can click **Details** next to any plan element to review the plan element details.
5. If necessary, you can remove a plan element by checking the remove check box and clicking **Update**.
6. If necessary, click **Restore** to return to the previously saved information.

7. After the plan elements are assigned and saved, click **General** to return to the Compensation Plan Details page.
8. Click **Validate**. If you entered the plan information correctly, 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 assigned that has start and end dates within the plan start and end dates.
- Each plan element has a rate table structure that makes sense for the plan element type.
- Each revenue class has at least one key transaction factor and at least one other transaction factor.

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

Optionally, edit the start and end dates for individual salespeople. When the compensation plan is assigned to a sales role, the sales role and resources assigned to the sales role display in the compensation plan window. (See [Defining Sales Roles](#).)

## Sales Roles

After you have created a compensation plan, you can assign it to multiple sales roles. Use the Sales Roles page to do this. Perform the following procedures to assign sales roles to a compensation plan.

### **Prerequisites**

Sales role and valid compensation plan must both be created.

### **Steps**

1. Click **Go** to open pop-up list of sales roles.
2. Select a sales role and click it.
3. Enter start date and end date for the role. If desired, use the calendar icons to open a pop-up calendar.
4. Enter additional sales roles in the blank rows provided.
5. Optionally, click the eraser icon to clear information in that specific row.
6. To delete a sales role, check the Remove check box.
7. If necessary, click **Restore** to return to the previously saved information.
8. 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. If you attempt to make that assignment, an error message will display.

## **Defining Plan Elements**

A **plan element** is a set of conditions a salesperson must meet to be eligible for compensation. Compensation plans contain one or more plan elements that are used to determine how compensation is calculated. The Plan Element definition process uses three main steps, each with their own page. These are [Plan Element Details](#), [Assign Revenue Classes](#), and [Assign Rate Tables](#). Use the following procedure to define plan elements.

### **Prerequisites**

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

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

If the plan element includes a revenue class, then the revenue class must be defined first.

## Steps

1. To view Plan Elements, click the Incentive tab and the Element subtab.  
The Plan Elements page displays.
2. Select a plan element from the list or use the Saved Searches field at the top.
3. To customize and save a search that you expect to use frequently, click **Personalize** to go to the [Search Saved Searches](#) page.
4. To see plan element details, On the Plan Elements page, click the plan name in the Name column.  
The [Plan Element Details](#) page appears. Go to this page to see Name, Start and End Dates, Parameters, and Variables.
5. On the Plan Elements page, click the description column to see the full text of any description for the plan element.
6. Also on the Plan Elements page, you can view and also change the Start Date and End Date of any plan element:
  - a. Click the calendar icon next to each column to open a pop-up calendar.
  - b. Specify the new dates.
  - c. Click **Update** to save changes or **Restore** to return to the previously saved version.

To create a new Plan Element, click Create and go to the [Plan Element Details](#) page.

## Guidelines

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

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

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

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

## Search Saved Searches

To create a customized search, perform the following steps. You can access this page by clicking Personalize on the Plan Elements page.

1. In the Plan Elements area, enter a plan element name in the Name field.
2. Enter an effective date. You can use the calendar icon to the right of the Effective Date field.
3. In the Display Options area, select which columns you want to display in your search. Use the arrow buttons in the center of the display to move columns back and forth between the Available group on the left to the Displayed Columns group on the right. Use the up and down arrows at the far right to move through the display in the displays.
4. Select how you want to sort the rows. The application allows for three levels of sorting. In the left hand three fields, choose your sort parameters from the drop-down lists. In the right hand fields, select ascending or descending order from the drop-down lists.
5. Enter a number of rows you want to have displayed at a time.
6. In the Save As area, give your search a unique name.
7. Click **Save** to save it, or Save and Apply Search to use the new saved search.
8. Check the Default check box if you want your new customized search to be the default selection on the Plan Element page.

### Guidelines

If you are creating a customized search, you can set the number of rows that you want to display in step 5. However, you *cannot* change the number of rows that are displayed in any saved search that is seeded data. In addition, you *cannot* change the number of rows displayed in a customized search by clicking the Profiles icon in the upper right part of the page.

## Plan Element Details

The Plan Element Details page enables you to view information about plan elements that have already been created. You can also use this page to make changes in those plan elements or to define new plan elements. You can get to this page by clicking a plan element name in the Name column or clicking the create button on the Plan Elements Page.

If you are viewing or changing an existing plan element, the Plan Element Details page will already contain some information in the fields. If you are creating a new plan element, you must enter the information into the blank fields.

Perform the following procedures:

1. Enter or verify the Name, Description, Start Date and End Dates in the top area of the page. Name and Start Date are required fields.
2. In the Parameters area, select an incentive type from the drop-down list. Selections include Commission, Bonus, and Manual. See Guidelines.
3. Select an Interval Type from the drop-down list. See Guidelines.
4. 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.
5. Select a Formula Type from the drop-down list. This is a required field. See Guidelines.
6. If you select a Formula type of Formula, select a formula from the drop-down list in the Choose Formula field. See Guidelines.
7. If you select Formula type of External, you must enter the package name in the Package Name field. See Note in the Guidelines section.
8. 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.
9. In the Variables area of the Plan Element Details page, enter the Target, Fixed Amount and Goal figures. See Guidelines.
10. If you make a mistake, click **Restore** to return to the previously saved version.
11. Click **Update** to save your work.

### Guidelines

The Commission incentive type is based on formulas in a compensation plan. Bonus incentives are additional compensation based on aggregated transactions. Manual incentive is an amount that is made at the discretion of a manager and is not based on a preset percentage or on an aggregated amount.

The Interval Type is the regular period of time used for setting quotas and commission payments. Commonly used intervals are Period (month), Quarter, and Year.

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**Note:** You can use an **external formula** in a plan element in this release of Oracle Incentive Compensation. External formulas are similar to system generated formulas, except that they contain customized material. This means that when you upgrade the application, any changes that were made are not automatically applied to the external formula, so they must be applied manually.

To use an external formula in a plan element, select External Formula type in the Formula Type field and enter the name of the PL/SQL package in the Package Name field.

To create an external formula, perform the following steps:

- Start with a system generated formula that resembles your desired formula as closely as possible.
  - In the PL/SQL code, rename the formula, changing the name in every place it appears.
  - Change the formula number to Null.
  - Add customization as required.
- 
- 

If you select a formula type of Formula, be sure it has a status of Complete.

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.

## Assign Revenue Classes

Revenue classes are user-defined categories of business revenue used to determine whether sales credit is applied toward a compensation payment. Revenue classes are defined in the Revenue Class subtab of the Administration tab. Use the Assign Revenue Classes page to assign already defined revenue classes to a plan element.

### Prerequisites

Revenue classes must already be defined. Plan element details have been defined in the Plan Element Details page.

To assign revenue classes to a plan element, perform the following procedure:

### Steps

1. Select a revenue class by clicking **Go** next to the first empty field in the Revenue Class column under any previously assigned revenue classes.  
A pop-up window appears listing all available revenue classes.
2. Select a revenue class by clicking it.
3. Assign a quota to the plan element for the selected revenue class and enter it in the Quota column.
4. Assign a fixed amount to the revenue class for this plan element.
5. Assign a goal in the Goal column for this plan element.
6. If necessary, click **Restore** to return to the previously saved version.
7. Click **Update** to save your work.
8. Click **Details** in the Details column to go to the [Plan Element Details](#) page. On that page you can specify transaction factors and other factors that affect commission payments.

## Plan Element Details

On the Plan Element Details page you can modify the incentive amounts by using payment and quota accelerators, as well as transaction factors and other factors. You define the effective period for these temporary changes by assigning a Start Date and an End Date. These accelerators increase compensation during that time period, and can be used as incentives for salespeople.

Transaction factors help you stage **sales credit** over the life of a sale, assigning percentages of the transaction amount to the events that are important to your sales organization.

### Prerequisites

Revenue class is already created.

### Steps

1. In the Accelerators area, enter a start date and end date for each accelerator.

Click the calendar icons to the right of each field to use the calendar pop-up window.

2. Enter numbers in the Payment% and Quota% fields to show the amount of acceleration you want to assign. The default is 100, which is the full amount. Entries can be above or below 100.
3. If necessary, click **Restore** to return to the previously saved information.
4. Click **Update** to save your work.
5. In the Transaction Factors area, enter numbers in the Factor% fields to stage the payment of commission. See Guidelines.
6. If there are more transaction factors than can be seen at one time, use the drop-down list at the bottom of the area to scroll through them.
7. In the Other Factors area, assign any changes you want to make to the listed events. The default entry for the Factor% column is 100 for each field.
8. If there are more other factors than can be seen at one time, use the drop-down list at the bottom of the area to scroll through them.
9. If necessary, click **Restore** to return to the previously stored information.
10. Click **Update** to save your work.

### **Guidelines**

Make sure that your transaction factors add up to 100% in total. For example, you can have 50% of the commission calculated upon order, 20% calculated at invoice value and the final 30% calculated upon payment.

Items listed under Other Factors do not need to total 100%, and each can be over 100%. These items include Takeback, Credit Memo, Deposit, Debit Memo, Giveback, Manual Transaction, Payment Plan, Payment Plan Recovery, Order Return, Upgrade, and Writeoff.

## **Assign Rate Tables**

In the Element subtab of the Incentive tab, you can assign parent rate tables and also a child formula.

### **Steps**

1. Enter a rate table name in the Name column. Click **Go** to open a pop-up list.
2. Select a rate table from the pop-up list and click it.

3. Enter an effective start date and end date. You can view the rate table details and rates by clicking **Rate Table Details**.
4. Enter a child formula from the drop-down list if desired. Click **Apply**.
5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your work.

## Creating Formulas

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

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

### Prerequisites

Calculation expressions must be defined before you assign them to a formula.

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

Rate tables must be created first if you want to include them in your formula. (To define rate tables, see [Rate Schedule Detail](#).)

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.

### Steps

1. To view details or make changes in a formula, click it in the Name column. This takes you to the Formula Definition page, the first of three formula detail pages. (See [Formula Definition](#))

If there are many formulas already defined in your instance, use the search parameters at the top of the page or the search drop-down list at the bottom of the page to find the formula.

2. To create a formula, click **Create**.

The Formula Definition page opens.

3. To remove a formula from the list, check the Remove check box. You cannot remove a formula that is currently part of an active plan element.
4. To return to the previously saved information, click **Restore**.
5. Click **Update** to save any changes.

## Formula Definition

1. Enter a unique name and a description for your formula.
2. Enter Commission or Bonus from the drop-down list in the Type field. (See Guidelines)
3. Select Individually or Group from the Apply Transactions drop-down list. (See Guidelines)
4. Make a selection from the Split drop-down list. (See Guidelines)
5. Check the Accumulative check box if you want to aggregate the transactions. (See Guidelines).
6. 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)
7. Check the Planning check box if this formula is used for plan modeling purposes.
8. 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.

### Guidelines

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

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

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% will be applied to the whole transaction amount of 1500. If you select Non Proportional

in the Split drop-down list, 1% will be applied to 1000 and 2% will be 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 will pay 80 and half of the second tier  $[(1300-800)/(2000-1000)]$  will pay 100 (half of the rate 200). Total commission for the second transaction is 180.

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

Check the Thresholded check box if you want all prior transactions within the interval paid retroactively at the higher rate once that higher rate is achieved through accumulated transactions.

## Assign Expressions

After your formula is defined, you can assign expressions to it. Expressions are used for Input, Output, and for performance measures. Create expressions in the Expressions subtab.

### Prerequisites

Expressions must be created first.

### Steps

1. 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 will select later.
2. Assign a forecast, if desired.

3. Click the eraser icon in the Remove column to delete an expression from the formula.
4. In the Output area, select an expression from the drop-down list.
5. As with the input expression, you can select a forecast from the drop-down list.
6. 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.
7. If necessary, click **Restore** to return to the previously saved information.
8. Click **Update** to save your work.
9. Proceed to [Assign Rate Tables](#) to assign a rate table to the formula.

## Assign Rate Tables

1. If applied rates are part of your formula, then in the Rate Table tab, select the rate tables to apply to the formula.
2. Enter an effective start date and end date. You can view the rate table details and rates by clicking **Rate Table Details**.
3. Return to the Incentive > Formula > General and click **Generate** in the General area. If you have successfully created the formula, the status field above the Generate button will change from Incomplete to Complete.
4. Click **Update** to save.

## 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 and how the resulting rate is used in the calculation.

This rate table summary page lists all rate tables created in your instance of Oracle Incentive Compensation, along with the rate type and number of dimensions. Amount type rate tables base compensation on amount of sales volume. Percent type rate tables are based on percentage of goal achieved.

To see information about a rate table or to change it, click the rate table in the Name column to go to the Rate Schedule Detail page. To add a new rate table, perform the following procedure.

### Prerequisites

Rate Dimensions must exist.

### Steps

1. In the first blank field in the Name column, enter a unique name for the Rate Table.
2. Select a Rate Table type, either Amount or Percent, from the drop-down list.
3. If necessary, click **Restore** to return the information to the previously saved version.
4. Click **Update** to save your work.
5. Click your new rate table in the Name column to go to the Rate Schedule Details page.

## Rate Table Details

Use the following procedure to define rate tables.

### Prerequisites

Rate table has been named in Rate Tables page. Dimensions must exist.

### Steps

1. Be sure the name of your rate table appears in the Name field and the type in the Type field below.
2. If you want to change the Type, select it from the drop-down list.
3. In the Dimensions region, any dimensions previously assigned to the rate table are listed.
4. Click **Details** to go to the Dimensions page, where you can view the percentages assigned to the rate tiers and change them.
5. To add an already created dimension to the rate table, click **Go** next to the blank Dimension Name field to open a pop-up list.
6. Select a rate dimension from the list.
7. To assign or change commission rates, click the Assign Commission Rates link to go to the Assign Commission Rates page (See [Assign Commission Rates](#))
8. To create a new dimension, in the Rate Schedule Detail page, click **Create**.

The Dimensions page appears (See [Dimensions](#)).

9. If necessary, click **Restore** to return to the previously saved information.
10. After you have assigned the dimensions you need to the rate table, click **Update** to save your work.

## Assign Commission Rates

This page is connected to the Rate Schedule Detail page. Use the Assign Commission Rates page to enter or change the rate table percentage paid for each tier of a rate table.

### Prerequisites

A rate table must already be created.

### Steps

1. Next to each rate tier, enter the commission rate you want to use in the rate table.
2. To return to the previously saved information, click **Restore**.
3. Click **Update** to save your work.

## Dimensions

Use the Dimensions page to define or change the rate tiers in a dimension of a rate table.

### Prerequisites

To change rate tiers, a dimension must already be created.

### Steps

1. Enter a name in the Name field for your dimension. If you are making changes in an existing dimension, be sure the field contains the name of the dimension on which you want to work.
2. Select or verify the type from the drop-down list.
3. Optionally, enter a description.

4. In the Rate Tiers area, enter numbers in the From and To columns. Follow the sequence, and do not leave any gaps in the rates.
5. If you want to add a tier, use the blank fields at the bottom of the table.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your work.
8. Click **Back** to return to the Rate Schedule Details list, where you can assign the dimension you created to the rate table.

## Rate Dimensions in Multidimensional Rate Tables

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

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

Note: This version of 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 area must be stated in terms consistent with your input information.

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

In the following table, 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%
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%

If the application is unable to **find** a match in a string dimension rate table, the application will pick the last **rate** value by default. For example, suppose that in the example above, a transaction has dimension values of 10,000, Iowa, and Service. No

matches will occur, and the rate table result will be 9.25%, the last value in the Rate column.

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

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

## Calculation Expressions (Summary)

This page lists all of the calculation expressions that have been defined in your implementation of Oracle Incentive Compensation.

### Steps

1. To see calculation expression details, click the expression in the Name column to go to a detail page, which is also titled [Calculation Expressions](#).
2. Also on the Calculation Expression summary page, you can click the text in the Usage column to read the full text. The Usage text lists the places where the specific calculation expression may be used in a formula. Typical uses include input expressions, output expressions, and performance measures.
3. The status column on the Calculation Expression summary page indicates if the calculation expression is valid. An invalid expression cannot be used in a formula.

## Calculation Expressions (Detail)

Use this page to define calculation expressions.

### Prerequisites

Table and column mapping is complete.

### Steps

1. Enter a unique name for the expression. This is a required field.
2. Optionally, provide a description for the expression.

3. Select a Type from the drop-down list. The seven selections represent groups of calculation elements, such as expressions, formulas, and SQL statements. Only the calculation elements in that selection are displayed in the Calculation Values box.
4. From the Calculation Values box, select the column to be used in the expression.
5. Press the right arrow key to move the column into the Expression box.  
If you change your mind, you can press the left arrow button to remove an entry from the Expression box.
6. 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, press the left arrow button.
7. Optionally, numeric constants can be added to an expression. Enter the numeric value desired in the number field and press the right arrow button to move it to the Expression box. As above, press the left arrow button to remove an entry from the Expression box.
8. Add elements and operands until the desired expression has been created.
9. Optionally, click **Restore** to return to the previously saved information.
10. Click **Update** to save and compile your expression.  
The status of the expression should read Valid if it has compiled properly.
11. 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

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

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

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

The following Oracle 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 expression can only use columns from the following list of tables:

1. CN\_SRP\_PERIOD\_QUOTAS
2. CN\_SRP\_PAN\_ASSIGNS
3. CN\_SRP\_QUOTA\_ASSIGN
4. CN\_QUOTAS

## Modeling - Agreement Version Summary

The Agreement Version Summary page is the entry point to the Modeling tab. After selecting a role name in the search field, all versions of the role are displayed. Columns show useful earning information, such as On Target Earnings and Total Quota, as well as where in the process the role is, such as Status and Activation Status. From the listing, you can go to other pages to see details and compare the versions of the role.

### Prerequisites

Log in as Super User responsibility.

### Steps

1. To search for a role, enter the name in the Role Name field, or click **Go** to open a pop-up list. Click your selection on the list.
2. Click **Apply**.  
A list of role versions is displayed.
3. To see version details, click the name in the Version Name column.  
The [Agreement Version Details](#) page is displayed.

4. To see complete information on the total quota, click the number in the Total Quota column.

The Assign Quota to Version pop-up window is displayed. The window identifies the version by Sales Role, Version, and start and end dates, and also displays the quota components with assigned amounts. These amounts can be changed. Click **Update** after making changes to save them.

5. Click **View** in the Plan column to go to a complete listing of the [Compensation Plan](#).
6. To create a new agreement version, click **Create**.  
The [Model Create](#) page is displayed.  
To delete a version from the Summary, check the Remove check box. The version will be removed when you save.
7. If necessary, click **Restore** to return to the previously saved information.
8. After making any changes, click **Update** to save them.

## Model Create

This page is used to create a new agreement version.

### Prerequisites

A role must already be created.

### Steps

1. Enter a Version Name.
2. Enter a Version Description.
3. Enter a Start Date and End Date. Click the calendar icon to open a pop-up calendar.

Note: All of these fields are required.

4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Create** to save your new version.

## Agreement Version Details

The Agreement Version Details page displays all of the plan components in the version, arranged by component type. Types include combinations of Fixed and Variable, Computed and Non Computed, and Quota and Non Quota.

### Prerequisites

Agreement versions must already be created. Log on as Super User responsibility.

### Steps

1. If you want to copy another agreement version, select it from the Copy Version drop-down list.
2. Click **Apply**.
3. Below the Copy Version field are several fields in which to enter general information about the version. Start by entering a figure for the On Target Earning.
4. Check the Club Eligible check box if the agreement includes club benefits at a certain level of achievement.
5. Enter a rounding factor for calculation. The default is 1.00.
6. Enter a Quota Minimum figure, and a Quota Maximum, if there is one.
7. Select Plan Level. This indicates the level in the salesperson hierarchy. Level 1 is the street level.
8. Select a previously defined attainment schedule from the Attain Schedule drop-down list.
9. If necessary, click **Restore** to return to the previously saved information.
10. Click **Submit** to save the agreement.

You can review and change, and remove the components of the agreement.

1. In all areas, you can remove components by checking the Remove check box. The component will be deleted when you save.
2. The components can be sequenced by placing numbers into the Sequence column starting at 1.
3. For all components, click **Go** to open a pop-up list. Click your selection to enter it into the field.

4. Also, you can click **Submit** to save or **Restore** to return to the previously saved version at each section of the Agreement Version Details page.
5. For Fixed Pay components, simply enter the fixed pay amount.
6. For Variable Pay, Non Computed components, you have more options:
  - a. Enter a figure in the % of Total Quota field if you want to restrict the importance of a particular component.
  - b. Enter the commission amount at 100% attainment.
  - c. If a formula is required, select it from the list. Click **Go** to open a pop-up list.
  - d. A rate table is required for calculation. Select one from the drop-down list.
  - e. Anchors are also part of a calculated component. You can disable them by checking the Disable Anchors check box if you want to remove limits to earnings at each percentage of attainment. Click **Define** in the Anchors column to go to the [Resource Details - Customized Anchors](#) page.
  - f. To use a Oracle Incentive Compensation plan element, enter it in the Plan Element Name field.
7. For Variable Pay, Computed components, the fields are much like those for Non Computed components, but a formula is required, and it can be edited. Click **Edit** in the Edit Formula column to go to the [Computed Component Formula](#) page.
8. The Variable Pay, Non Quota Components area has fewer fields, but a calculation formula and rate table can be selected.
9. After the agreement version is approved and activated, it can be moved into a compensation plan. To do this, in the Map to Compensation Plan area, enter the compensation plan name, along with start and end dates.

## Compensation Plan

This display-only page describes the version of the compensation plan that was defined in the [Agreement Version Details](#) page. It is useful for reviewing the entire agreement version at a glance. At the top, the agreement version, role name, start date and end date are displayed. Below, the components of the agreement are laid out, including rate tables and commission amounts for each percentage level of attainment.

## Agreement Version Summary - Comparison

This page lists the different versions of an agreement. You can select multiple versions and compare them using the Agreement Version Comparison page. Then, you can activate the one that best suits your requirements.

In this release, you can also use this page to display a single agreement in order to view the agreement details.

### Prerequisites

Agreement versions must already be created and all details given, including quota.

### Steps

1. Select a role name.
  - a. Click **Go** to open a pop-up list.
  - b. Select a role.
  - c. Click **Apply**.

The agreement versions are displayed.
2. In the Select column, check the check boxes for the agreement versions you want to compare.
3. Click **Compare**.

The [Agreement Version Comparison](#) page is displayed.
4. After you have compared the versions, click the Comparison subtab to return to the Agreement Version Comparison page.
5. In the Select column, check the check box next to the version you want to activate.
6. Click **Activate**.

In the Activation Status column, Not Activated is changed to Activated.
7. If necessary, click **Restore** to return to the previously saved information.

## Agreement Version Comparison

This page compares two or more versions of an agreement. After comparing them, you can return to the Agreement Version Summary page to activate the version of your choice.

### Prerequisites

Agreement versions must already be created.

### Steps

1. Click the numbers in the Assigned Quota column to go to the Assigned Quota to Version pop-up window. The amounts for each component can be changed. Click **Update** to save any changes.
2. Click **Modify** in the Anchors column to go to the [Resource Details - Customized Anchors](#) page. Anchor values can be changed there.
3. Click **Apply** on the Agreement Version Comparison page to see the results of your modifications on the pop-up window and other page.
4. When you are finished, you can return to the Agreement Version Summary page to activate the version, or go to the [Agreement Version Summary](#) page of the Performance subtab to view estimated payouts.

## Agreement Version Summary - Performance

This page enables you to view different versions of an agreement for a role name. It is very much like the Agreement Version Summary pages for the Agreement and Comparison subtabs, but it includes an Estimated Payout column and a Scenario column.

### Prerequisites

Agreement versions must already be created.

### Steps

1. Select a role name.
  - a. Click **Go** to open a pop-up list.
  - b. Select a role.
  - c. Click **Apply**.The agreement versions are displayed.
2. Click a name in the Version Name column to go to the Estimated Achievements pop-up window.
  - a. You can change the amount/units or payment amount for any variable components.

- b.** Click **Update** to save your changes.
- 3.** To compare performance between versions, check the check box in the Select column for each version you want to compare.
- 4.** Click **View Performance**.  
The [Agreement Version Comparison](#) page is displayed.
- 5.** After you have compared versions and made modifications on the Agreement Version Comparison page, you can return to the Agreement Version Summary page and click **Activate** to activate a version of the agreement.
- 6.** If necessary, click **Restore** to return to the previously saved information.

## Agreement Version Comparison - Performance

This page compares two or more versions of an agreement. Unlike the comparison in the Comparison subtab, this page also includes Estimated Achievement and Estimated Payout columns. After comparing versions, you can return to the Agreement Version Summary page to activate the version of your choice.

### Prerequisites

Agreement versions must already be created.

### Steps

- 1.** Click the numbers in the Assigned Quota column to go to the Assigned Quota to Version pop-up window. The amounts for each component can be changed. Click **Update** to save any changes.
- 2.** Click **Modify** in the Anchors column to go to the [Resource Details - Customized Anchors](#) page. Anchor values can be changed there.
- 3.** Click a number in the Estimated Achievements to go to the Estimated Achievements pop-up window.
  - a.** You can change the amount/units or payment amount for any variable components.
  - b.** Click **Update** to save your changes.
- 4.** Click **Apply** on the Agreement Version Comparison page to see the results of your modifications on the pop-up window and other page.

5. When you are finished, you can return to the [Agreement Version Summary](#) page to activate the version you want to use.

## Resource Search

This page is used in multiple places in Oracle Incentive Compensation to define a report for a specific resource. The fields vary in number and order, depending on where the window is used, but include some or all of the following:

- Name
- Employee number
- Job Title
- Compensation Group
- Organization
- Effective Date

### Steps

1. Enter at least one search parameter.  
Enter information in the fields, or enter partial information and click **Go** to search. Then, select from the search results.
2. If searching by Effective Date, you can use the calendar graphic icon.
3. Search by exact word or number or use a search key with the % sign.
4. Click **Apply**.
5. Use Clear to remove information you have entered before entering new information.
6. If no information is available, change your search parameters and try again. Or, search on a different effective date.

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- Employee number
- Job Title
- Compensation Group
- Organization
- Effective Date

### **Steps**

1. Enter at least one search parameter.

Enter information in the fields, or enter partial information and click **Go** to search. Then, select from the search results.

2. If searching by Effective Date, you can use the calendar graphic icon.
3. Search by exact word or number or use a search key with the percent sign (%).
4. Click **Apply**.
5. Use Clear to remove information you have entered before entering new information.
6. If no information is available, change your search parameters and try again. Or, search on a different effective date.

## Salespeople Found

This page displays the results of a Salespeople Search. Used in the Quota tab, it supplies basic resource information.

To perform the action for which you did the search, click the name in the Salespeople Name column to go to the next page.

## Resource Search Results

This page appears after you search using the Resource Search page. It is a list that displays HR job related entries for each resource that fits the parameters of your search.

### Steps

1. Click a name in the Name column to go to the Resource Details - Main page for that resource.
2. Click a column heading to sort the table by that field, for example, by Job Title.

A blue triangle marks the column on which the data is currently sorted.

## Resource Details - Main

The Resource Details - Main page displays useful information about a resource. Beneath the basic employee details, such as name and employee number, the page is divided into two areas: Job Titles and Managers. Both areas display information that has already been entered. However, a new row can be added to the Job Titles area.

## Steps

1. To enter a new job title, click **Go** next to the blank field in the Job Title column.
2. Select a job title from the list in the Select page.  
The job title field populates, along with fields assigned to it, such as Job Code, Discretionary Job Title, and Role.
3. Enter the Start Date and End Date for the job title. You can use the calendar icon.
4. Select an organization from the Organization drop-down list.
5. Check the Customized check box if you plan to customize the role for this resource. Note: If the Customized check box is checked, subsequent changes to the role may not affect this resource. If you plan to make changes to the contract text for the resource, be sure the Customized check box is unchecked.
6. The On Target Earnings field is populated when the Job Title is assigned. Click the link in this column to go to the [On Target Earnings](#) page.
7. Check the Overlay check box if you want the role to be an overlay. See [Overlay Salespeople](#).
8. Check the Club Eligible check box if the role includes club eligibility.
9. Optionally, click **Restore** to return to the previously saved version of the page.
10. Click **Update** to save the new Job Title row.

## Guidelines

Click the resource name link in the parameters to go to the Quota Allocation Details page for the resource.

The Compensation Group field includes a pop-up list. If a salesperson belongs to more than one group it will be displayed, and you can choose the one you need.

If you assign the job title of Manager to the resource, an entry for the resource will also appear in the Managers area of the page.

## Quota Allocation Details

This page allows you to view the quota allocated to you and your Directs.

If you are the Manager of this Compensation Group and you have the appropriate Manager access privilege, you may allocate quota to your Directs. There is reference information to help you perform the quota allocation exercise, such as:

- Your directs' role(s) in your compensation group as well as effective start and end dates
- Your directs' participation period in your Compensation Group (hierarchy start and end dates)
- Your directs' estimate of their own quota (Quota from Field column)
- The status of Compensation Plans. See Guidelines below on the approval process.

Navigate down the hierarchy of Compensation Groups to view your directs' allocation of quota to their own directs (hierarchy column), if applicable.

### Steps

1. You can do an initial distribution of quota by using the fields at the bottom right of the page. There are several options for allocating quotas. You may distribute your quota evenly to each of your directs by selecting Even (Distribute Quota field) and clicking **Distribute**. Alternatively, you can allocate the minimum quota by Sales Role by selecting Minimum. You can also allocate to each of your directs a quota amount equal to your own quota by selecting Equal.
2. To enter quota figures individually for each of your directs, click the hyperlink figure under the Planning Quota column.
3. Direct Level Overassignment is the total quota of your directs expressed as a percentage of your own quota. Street Level Overassignment is the total quota of the salespeople at the lowest level of the hierarchy (subordinate to your Compensation Group) expressed as a percentage of your own quota.
4. To produce a compensation plan that you can view after you have updated the quota that you have allocated to your directs, click **Generate**.
5. To create a vacancy or position to be filled by a new salesperson, Click **Create Vacancy**.  
The Add To-be-Hired page appears
6. Select a compensation group from the drop-down list.
7. Enter a start date and an end date. The dates must be in the future or an error message is generated (see Guidelines).

### Guidelines

In step 1, Distribute Quota will work only if the % of Total Quota is given for the components in the Sales Role Detail page for the resource.

The quota must be locked before it is allocated. The draft Contract is the Compensation Plan with Terms & Conditions added at the end.

In step 5, the dates that the enter to add a To-Be-Hired must be in the future. For example, on June 1, 2002, you cannot use a start dates of January 1, 2002 and an end date of May 31, 2002.

After the agreement is the way you want it, click **Generate** to generate it. Then, the Generate button becomes a Submit button. Click **Submit** to submit it to the Contract Approver. The Contract Approver can then view and approve the draft Contract with the locked quota. Once the draft Contract is approved, you can distribute the Contract to your directs. Your directs will then have the opportunity to view their new Contracts and either accept or print it. The approval status of the Contract can always be seen under the column called Plan Status.

## Resource Details - Quota Adjustment

Use this page to adjust a quota for a sales role or to create a new role associated with a resource.

### Prerequisites

Resource must already exist and have already been assigned and accepted a compensation plan.

### Steps

1. Click the button next to an existing role to adjust it.
2. Click Update.
3. Alternately, click the button next to the blank row to enter information for a new role.

If you are regoalng 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.

## On Target Earnings

This page displays fixed and variable compensation plan elements for a resource, for a specific job title. The page enables you to change amounts for each plan element and to customize anchor values for variable, quota based elements.

### Steps

1. To enter new amounts in the Amount field, click inside the field and type in new numbers.
2. If you wish, click **Restore** to return the figures to the previously saved version.
3. Click **Update** to save your changes.

The new total On Target Earnings amount will be displayed in the On Target Earnings field of the Resource Details - Main page.

4. To customize the anchor values for this person, click the Define link in the Anchors column.

The Define Quota Anchors window opens. See [Define Quota Anchors for Resource](#).

## Define Quota Anchors for Resource

Use this page to complete the definition of the rate table and quota anchor details for an individual resource.

### Prerequisites

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

### Steps

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

### Guidelines

The table below shows an example of amount based quota anchors. The left hand column indicates the percent of attainment, the next column shows Amount, the Anchor Type, and the last column shows the Expected

Commission. 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.

% of Attainment	Anchor Type	Expected Commission
0	Amount	0.00
25	Amount	5,000
50	Amount	12,000
100	Amount	20,000
200	Amount	50,000
9999	Amount	50,000

## Compensation Summary

This page describes how a particular resource is compensated. To look up information, perform the following procedure.

### Prerequisites

The resource must exist in Resource Manager. The resource must be assigned a role with a valid compensation plan.

### Steps

1. Select a credit type from the drop-down list.
2. Enter a role name for the resource. You can enter search parameters in the Role Name field and click **Go** to open a pop-up list.
3. Enter a period name. You can enter search parameters in the Period Name field and click **Go** to open a pop-up list.
4. Click **Apply**.

Commission and payment information is displayed in the areas below.

5. If the resource has been assigned multiple roles, select a new role in the Role Name field and click **Apply** to see information for that role.

### 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 bracket in the rate table assigned to that compensation plan, then the salesperson's rates default to those in the new rate table.

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

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.

## Compensation Plans

Compensation Plans are designed to pay each member of the sales team the agreed upon compensation for each transaction they generate. Compensation plans are assigned to sales roles, and a resource is then assigned to a sales role.

Certain parts of a compensation plan can be customized for a particular resource.

This page lists the compensation plans for the sales role you specify for the resource. To view or customize a compensation plan, perform the following procedure.

### Prerequisites

None

### Steps

1. Enter search parameters into the Role Name field at the top of the page and click **Go**.
2. Click the sales role you need and click **Apply**.  
The compensation plans and plan elements for the resource and sales role are displayed.
3. 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.
4. Click the plan element name.  
The Plan Element Details page is displayed.
5. Edit the details to customize the plan. See the table under References for a list of fields that can be changed and where they can be found on the Plan Element Details page.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your changes.

## Assign Pay Groups

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 must be defined in Administration > Incentive > Paygroup. The resource has been selected from the Salesperson Summary.

### Steps

1. In the Name field, enter the name of the pay group to be assigned. You can click **Go** to open a pop-up list of values. Click the pay group name to select it.
2. Enter a start date and an end date. Click the calendar icons to open a pop-up calendar.
3. If necessary, click **Restore** to return to the previously saved information.
4. Click **Update** to save the pay group assignment.

### Guidelines

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

## Assign Payment Plans

Payment plans are optional and are used to set up advance or deferred payments and to define minimum and maximum payments.

In this new version of Oracle Incentive Compensation, the recovery schedule and draw amount can be set up independently of the earnings for the period, and you can waive a recovery amount due from a salesperson. See Defining Payment Plans for more information.

To assign a payment plan to a resource, perform the following procedure.

### Prerequisites

The payment plan must be defined in Administration > Payment Plan.

### Steps

1. On the Assign Payment Plans page, review the salesperson's payment plan information.
2. To assign a new payment plan, enter it in the Name column of the first blank row. You can click **Go** to open a pop-up list. Select the plan from the list and click it.

3. Enter a start date in the next column. You can click the calendar icon to open a calendar. Enter the date and it will appear in the Start Date field. This field is required.
4. Optionally, enter an end date in the End Date column.
5. If you want to pay the salesperson either a minimum or maximum amount regardless of commissions earned, then enter the amount in the Minimum or Maximum column.
6. The **Recoverable, Pay Later, Recoverable Interval, and Pay Against Commission** fields display read-only information about the payment plan as it was created in the Administration tab.
7. If necessary, click **Restore** to return to the previously saved information.
8. Click **Update** to save your work.

## Sales Roles

A resource must be assigned to a sales role in order to receive compensation. As part of the Resource tab, this page shows the sales roles to which a particular resource is assigned. To assign compensation plans to a role, go to [Defining Sales Roles](#).

## Compensation Groups

Compensation groups are used to place a resource into a hierarchical relationship with managers, directors, directs, and other people with whom the resource shares compensation credit. This page, as part of the Resource tab, displays groups to which the resource is assigned, along with start dates and end dates.

## Defining Sales Roles

A **sales role** describes a set of salespeople who share a common compensation structure, for example, marketer, broker, and sales manager. Sales roles are created in Oracle Resource Manager.

A compensation plan must be assigned to a sales role to associate it with the compensation structure. To assign a compensation plan to a role, perform the following procedure.

### Prerequisites

Sales roles are defined using Oracle Resource Manager and have the Oracle Incentive Compensation role type.

Super User responsibility is required.

### Steps

1. On the Role page, click a sales role to view it.  
The Assign Compensation Plans page is displayed. Any plans already assigned are listed.
2. To assign a new compensation plan, enter the name in the Compensation Plan Name column of the first blank row. You can enter search parameters and click **Go** to open a pop-up list.  
Only compensation plans with Complete status may be used.
3. Select a start date and an end date to define the effective period for the compensation plan to be assigned to this sales role. Click the calendar icon to open a pop-up calendar.
4. If you want to remove a compensation plan, check the Remove check box.
5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your changes.

### Guidelines

The date range used to assign a compensation plan to a sales role must be within the start and end dates of the compensation plan itself.

## Assign Compensation Plans

Use this page to assign compensation plans to a role. Any compensation plans assigned to a role are listed. To assign a new compensation plan, perform the following procedure:

### Prerequisites

Compensation plans must already be created.

### Steps

1. Select a compensation plan in the first blank field in the Compensation Name column. Click **Go** to open a pop-up list.
2. Enter start and end dates. Click the calendar icon to open a pop-up calendar.
3. To remove a plan, check the check box in the Remove column.
4. If necessary, click **Restore** to return to the most recently saved information.
5. Click **Update** to save your changes.

## Compensation Groups

A Compensation Group is a number of salespeople who share the same rollup relationship. Placing the resources in one group makes it possible to follow the flow of compensation from salespeople through managers and to directors. For example, in one organization, there are six separate account groups. Each group has three to six members, with a manager to whom the salespeople report. The managers then report to the director.

Compensation groups are created in Oracle Resources Manager, and can only be viewed in Oracle Incentive Compensation. See Resource Manager documentation.

## Group Details

The Group Details page lists the members of a compensation group in four areas:

- Group Assignments
- Manager Assignments
- Salesperson Assignments
- Administrator Assignments

The Group Assignments area shows any parent group, or larger group of which this group is part, along with start and end dates.

The other three areas display their members in greater detail, showing type, along with start date and end date. Members of these subgroups can have different types and roles but still be in the same group.

## My Compensation Groups Search

Use this search page to show groups to which you have access.

### Steps

1. Enter a group name in the Group Name field. You can use a wildcard with the percent sign (%) after it.
2. Enter an effective date. Today's date is the default setting.
3. Click **Submit**.
4. Alternatively, click **Clear** to change your entries.

## My Compensation Groups

A Compensation Group is a number of salespeople who share the same rollup relationship. This application displays your details and your directs' on the next page.

### Steps

1. Enter your search parameters by selecting an Organization from the drop-down list.
2. Enter an Effective Date. Today's date is the default setting.  
The window will be populated with the results of your search.
3. Click the Compensation Group for which you wish to view details.  
The Quota Allocation Details page is displayed.

## Approve, Distribute, and Activate a Contract

You can approve, distribute, or activate a compensation plan using the second, third and fourth subtabs of the Quota tab.

To use the Approve subtab to approve the contract, see [Contract Approval](#).

To use the Distribute subtab to distribute the contract, see [Distribute Contract](#).

To use the Activate subtab to activate the compensation plan, see [Compensation Plan Activate](#).

## Contract Approval

This page enables the Contract Approver to view details of any plans to be approved and approve them using the action column. The report identifies the resource by Name, Job Title, Employee #, Organization, and Sales Role. The Start Date and End Date columns show effective dates of the contract. On target earnings columns are shown as a total and broken down into fixed and variable pay. The quota and club eligibility are displayed for reference, and if the employee is an overlay it is noted. The Name, Sales Role, and Plan Status columns can be clicked to open other pages.

### Prerequisite

There must be a plan to be approved, and the plan must be locked.

### Steps

1. Click **Name** to view the Quota Allocation Details page, or
2. Click **Sales Role** to view the complete contract, or
3. Click **Plan Status** to open the Compensation Plan History.
4. Select No Action, Approve, or Reject from the drop-down list in the Action column.
5. Click **Update** to make changes permanent.
6. Click **Approve All** to approve listed contracts.
7. If necessary, click **Restore** to return to the previously saved version.

## Distribute Contract

Use this page to distribute any plan that has been approved. You can click the Name, Sales Role, and Plan Status columns to open other windows.

### Prerequisite

There must be an approved plan to distribute.

### Steps

1. Click **Name** to view the Quota Allocation Details page or
2. Click **Sales Role** to view the complete contract, or
3. Click **Plan Status** to open the Compensation Plan History.

4. Check the check box in the Distribute column next to the plans that you want to distribute.
5. Click **Distribute**.  
After a plan is distributed, the listing disappears from the Distribute Contract window.
6. Optionally, click **Distribute All** to distribute all contracts
7. Optionally, click **Restore** to return to the previously saved version.

## Compensation Plan Activate

This page is used to activate plans that have been approved and distributed. Click the link in the Name column to go to the Quota Modeling Summary. Click the link in the Sales Role column to go to view the compensation plan details. Click the link in the Plan Status column to go to the Compensation Plan History page.

### Prerequisite

There must be an approved plan to distribute.

### Steps

1. Check the check box in the Activate column next to plans you want to activate.
2. Click **Activate**.  
After a plan is activated, the listing disappears from the Compensation Plan Activate window.
3. Optionally, click **Activate All** to activate all contracts.
4. Optionally, click **Restore** to return to the previously saved version.

## Compensation Plan History

This page is a log of records changes in the status of a salesperson's compensation plan. The changes are date-stamped, and the identity of the person or role who performed the action that changed the status is noted.

If the plan has been accepted, it become a link. Click the link to go to a page displaying the complete compensation plan. This page shows the total quotas, and the possible earnings for each plan element at each percentage of attainment. The approval and acceptance information is displayed at the bottom.

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## The Approved Compensation Plan

This page displays an approved and accepted compensation plan. It is a reference document, so no changes can be made to it. All quotas, plan elements, and attainment levels are displayed, along with approval and acceptance information.

## My Quota Estimate

This window allows salespeople, through Oracle Sales Online, to communicate to management what they think their new quota should be for the next compensation plan cycle. The manager and the manager's manager have access to view the quota estimate and they will take it into consideration when allocating the final quota.

### Prerequisites

Salesperson access to Oracle Sales Online.

### Steps

1. Enter a quota estimate against each quota component and under the Quota from Field column.
2. To erase an estimate, click **Restore** and the application will retrieve the last saved estimate.
3. Click **Update** to save.

## Reports

From this page, you can select any of the ten Incentive Planning reports from this page. Click the link in the report name column 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

## 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 over assignment effect reverberating through lower levels of the organization hierarchy

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

## Average Quota Report

With this report, you can view the average quota value 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. 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.

## Quota Overassignment Report

You can see in one report what the overassignment value and percentage effect is on the direct level and how the amount of the overassignment accumulates at the street level.

## Quota Range Report

This report allows you to scan the list of salespeople for those who have not been assigned a quota, or 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.

## Compensation Contract Status Report

This report enables you to determine the status of contract approvals for a specific manager as part of the Incentive Planning process. You can see how many contracts are pending approval, distribution, or acceptance and the number that are approved for each category you set up. You can know at a glance the totals by category or status. A total of all contracts is displayed in the lower right corner of the table.

Click a manager's name link to display individual tables for the resources who report directly to that manager.

## Overlay Report

This report lists all overlay salespeople, if any, who are members of the compensation group and groups below this group. This report is a concise display of overlay salespeople as distinct from previous reports where both overlay and nonoverlay salespeople are displayed together.

## Vacancy Report

This report lists all vacancies by sales role and compensation group and groups below this group. It is a concise means of listing vacancies and additional headcount requirements on one report.

## Transition Report

This report lists all salespeople who have not been allocated a role, or have a role but not a job title, 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.

## 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 aims to help analysts to identify those compensation plans that have not been activated for commission processing and to take action to investigate their nonactive status.

Prior to this release of Oracle Incentive Compensation, the components in Salesforce Planning had to be identical to the plan elements in Oracle Incentive Compensation used for commission processing, or the activation failed. In this release, activation will succeed as long as each component in the Incentive Planning compensation plan has a matching plan element in the compensation plan in Oracle Incentive Compensation, even if additional plan elements exist in the compensation plan.

For example, an Incentive Planning compensation plan has three components which match three plan elements in a compensation plan in Oracle Incentive Compensation, but the latter plan has a fourth element allowing manual transactions to be processed. In this case, the plan should be activated successfully.

## 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.

This report is configurable. For instructions on how to hide or show selected columns, go to the Configuring Reports section below.

## Collection Submission - View Request Status

Data must be collected from the mapped tables into Oracle Incentive Compensation before calculation for payment can occur. Use this procedure to view requests for selected types of transactions for calculation.

### Prerequisites

If you want to use information other than that provided in the default mapping, then you must first map the required information.

### Steps

1. In the View Request Status page, select the type of collection event you want from the Collection Type drop-down list. The list includes:
  - All
  - Takebacks
  - Custom Transaction Source
  - Invoices
  - Orders
  - Payments and Givebacks
  - Writeoffs
2. Select one of four options from the Phase drop-down list:
  - Completed
  - Inactive
  - Pending
  - Running
3. Select one of 18 statuses in the Status drop-down list.

4. Optionally, enter a search string in the Request ID field.
5. Click **Apply** to generate a list of transactions.
6. Click **View Log** in the Log column to go to the [Process Log](#), where the steps of the transaction are listed.

## Process Log

The Process Log page shows the details of the processing of a request.

## Collection Submission - Submit Request

Use this page to submit a transaction collection request.

### Prerequisites

Tables must be mapped. Transactions must have been processed to be collected.

### Steps

1. In the Collection Type field, select a collection type from the drop-down list. The collection package names include:
  - Takebacks
  - Custom Transaction Source
  - Invoices
  - Orders
  - Payments and Givebacks
  - Writeoffs
2. Select Start Period and End Period dates from the drop-down lists.
3. Click **Submit Request**.

The requested data is displayed below the search parameter fields.
4. Click **Refresh Data** to ensure that the collection package has completed installing.
5. Repeat steps 1 through 4 for each collection package you select in step 1, for example, Invoices, Orders, or payments and givebacks.
6. Proceed to the [Transaction Summary](#) (Adjust subtab).

### Guidelines

The Order Posting event collects data from Oracle Quoting - Forms. The other events collect data from Oracle Receivables.

When a change is made to a sales order in Oracle Quoting - Forms, the change is documented in a notification which is then processed during the running of Collect Orders. If the collection is run infrequently, then the number of notifications to be processed can make the run time lengthy. To shorten the run time of Collect Orders you can regularly run the concurrent program called Order Update Notification. This concurrent program processes the notifications and stores the pertinent information in a manner that will process more quickly during Collect Orders.

### References

For more information about collection events, see [How Data Collections Work](#).

For more information about mapping, see Oracle Incentive Compensation *Implementation Guide*, Mapping Transactions.

## Imports Search

This page lists transactions that have been imported, along with information about them. In this release, only Transactions API type of transactions can be imported using this feature.

### Steps

1. Click the link in the Name column to go to the [Import Details and Results](#) page.
2. If necessary, use the Search parameters, including Saved Searches.
3. Click the icon in the Log column to go to the [Process Log](#) page.
4. Click **Create** to import a new transaction.

The [Imports Introduction](#) page appears, which starts the Imports Wizard.

## Import Details and Results

This page displays details of transactions that have been imported, including User Input Data File Names Server Side Data File Names, and an Import ID number. This information is useful for tracking the history of previous imports and for finding the location of the original Excel spreadsheet.

## Process Log (Import)

This page enables viewing of the Process Log in four ways:

- Brief
- Debugs only
- Errors only
- Milestones only

## Imports Introduction

This page begins an Imports Wizard. The Imports Wizard is designed to make it easier to import transactions. Now, you can import a batch of transactions rather than importing them one at a time. Starting from this page, you continue creating the transaction on the Imports Definition page.

### Prerequisites

A transaction must already exist.

### Steps

1. Click **Next**.  
The [Imports Definition](#) page appears.
2. Enter the required information on the Imports Definition page.

## Imports Definition

This page is Step 1 of the Imports Wizard. It walks you through the process of importing transactions. The process continues on to Step 2: Import Header Mapping, Step 3: Review, and Confirmation pages. Required fields are marked with an asterisk (\*).

### Prerequisites

The source file must have data delimited in one of the formats recognized by the Transaction API (comma, double quote, single quote, semicolon, space, or tab).

### Steps

1. The import type of Transaction API is the only choice available.

2. Enter a name for the import process. The Name field is required and must be unique.
3. Optionally, enter a description in the Description field.
4. Click the Client or Server button to define your data source. If your source data file location is from a Client, click **Go** to open a pop-up box and select the file name from the list.
5. Select the column delimiter from the drop-down list (see Prerequisites for complete list). Comma is the default.
6. Select how you want your fields to be enclosed from the drop-down list. Double Quotation is the default.
7. Check the File Header Exists check box if there is a header on the source file. Mapping begins at the first column, so it is important to specify if your source file has a header.
8. Click **Next** to proceed to Step 2: [Import Header Mapping](#).

### Guidelines

Note: If the source file is created using Excel and saved with a .csv file extension, the data will automatically be delimited with commas by Excel. If you want to update the source file and remove any rows, select the row(s) and use Edit > Clear > All to remove the data. This will clear the data and the delimiters. Manually deleting each cell will not clear the delimiters. Failure to do so may cause the import to fail. This issue may also arise when using other spreadsheet applications.

## Transactions

Use the Transactions page to review transactions and prepare to load them for calculation. Also, if a collected transaction contains errors in information or credit assignment, then it can be corrected on this page. To make preparations or corrections, perform the following procedure.

### Prerequisites

Incentive Compensation Super User or Incentive Compensation Commission Analyst responsibility is required.

The application has collected the transaction.

## Steps

1. In the Basic Search area, enter information in the fields as needed to find the transaction you need. Search parameters include:
  - Resource Name: Enter all or part of the name and click **Go** to open a pop-up list. Select from the list.
  - Resource Number: Enter the number.
  - Processed Date From: Click the calendar icon to open a pop-up calendar.
  - Processed Date To: Click the calendar icon to open a pop-up calendar.
  - Invoice Number: Enter the invoice number if it is available.
  - Order Number: Enter the order number if it is available.
  - Calculation Status: Select **All** (the default) or one of five other choices from the drop-down list.
2. Click **Apply**.

A list of transaction records appears.
3. At the top or the bottom of the page, click the correct button for the type of adjustment you want to perform:
  - **New Transaction**

Click this button to go the [Create New Transaction](#) page, where you can create a new manual transaction.
  - **Load Transaction**

Click this button to go to the [Load Transactions - Submit Request](#) page.
  - **Move Credits**

Click this button to go to the [Move Credits](#) page, where you can move credit from the existing credited salesperson to a salesperson you specify.
  - **Deal Split**

Click this button to go to the [Deal Split](#) page, where you can split the sales credit for an entire deal, which may include more than one transaction.
4. To adjust or split an individual transaction, click **Adjust** or **Split** in the Action column next to the transaction you want to adjust.
5. If you click **Adjust**, the Transaction Details - Adjust page opens. If you click **Split**, the Transaction Details - Split page opens.

6. Perform the steps you need on the appropriate page.

### **Guidelines**

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

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

You can adjust more than one record at a time.

## **Create New Transaction**

If any salesperson needs manual sales credit line adjustments, you can create a manual transaction for the effective date. To enter new transactions, perform the following procedure.

### **Prerequisites**

None

### **Steps**

1. Enter the Resource Name and Resource Number. These are required fields. You can enter some or all of the name and click **Go** to open a pop-up list.  
Select the resource from the list and the fields on the page populate.
2. Enter a Processed Date. Click the calendar icon to open a pop-up calendar. This is a required field.
3. Enter a Revenue Type from the drop-down list.
4. Enter Invoice Number and Invoice Date, and Quantity if available or needed. The date fields have calendar icons available.
5. Enter Transaction Amount. This is a required field.
6. Optionally, enter the other fields that follow, as available.
7. At the bottom of the page, enter a Reason. A drop-down list is available.
8. Enter comments, if any.
9. If necessary, click **Restore** to return to the previously saved information.
10. Click **Update** to save the transaction.

### **Guidelines**

All adjustments made with the above process must be loaded before they are available for calculation.

## **Move Credits**

Move Credits gives you the ability to mass adjust a group of transactions based on criteria selected in the parameters. Use the Move Credits function when the sales credit for a number of transactions has been erroneously assigned to the wrong salesperson.

### **Prerequisites**

None

### **Steps**

1. In the Receiving Resource Name area, enter the Resource Name and Resource Number. These are required fields. Click **Go** to open a pop-up list.
2. Enter a Customer Name and Customer Number, if available.
3. Enter your comments, if any.
4. If necessary, click **Restore** to return to the previously saved information
5. Click **Update** to save your work.
6. In the Attribute Columns area, enter any information that identifies your transaction.
7. If necessary, click **Restore** to return to the previously saved information
8. Click **Update** to save your work.

### **Guidelines**

The feature maintains the history of the original transaction or transactions while displaying the corrected transactions.

All adjustments made with the above process must be loaded before they are available for calculation.

## **Deal Split**

Use this page to divide up the sales credit on an entire deal.

### Prerequisites

None

1. In the Revenue Type column, select Revenue or Non Revenue from the drop-down list.
2. In the Resource Name field, enter a resource name. Click **Go** to open a pop-up Select page to search through existing resources.  
The resource number populates automatically.
3. Alternatively, enter a resource number in the Resource Number field. Click **Go** to open a pop-up Select page to search through existing resource numbers.  
The Resource name populates automatically.
4. Repeat steps 1 through 3 for each resource.
5. In the split field, enter a percentage for each resource. The numbers should add up to 100 percent.
6. Click **Update** to save. If you are making changes to an existing deal split, you can click **Restore** to return to the previously saved information.

## Transaction Details - Adjust

If any salesperson needs manual sales credit line adjustments, you can create a manual transaction for the effective date. To enter new transactions, perform the following procedure.

### Prerequisites

None

### Steps

1. Enter the Resource Name and Resource Number. These are required fields. You can enter some or all of the name and click **Go** to open a pop-up list.  
Select the resource from the list and the fields on the page populate.
2. Enter a Processed Date. Click the calendar icon to open a pop-up calendar. This is a required field.
3. Enter a Revenue Type from the drop-down list.
4. Enter Invoice Number and Invoice Date, and Quantity if available or needed. The date fields have calendar icons available.

5. Enter **Transaction Amount**. This is a required field.
6. Optionally, enter the other fields that follow, as available.
7. At the bottom of the page, select a view from the drop-down list. There are four views:
  - **Commission Lines**
  - **Transaction History**
  - **Customer Address**
  - **User Notes**

Select one and click **Apply** to display the information.

8. The first three views are for reference only. The **User Notes** view contains a **Reason** drop-down list.
  - a. Select a reason.
  - b. Enter your comments.
9. If necessary, click **Restore** to return to the previously saved information.
10. Click **Update** to save your work.

Note: The **Update** and **Restore** buttons appear only in the **User View**. Return to that view to save your work.

## Split Transaction

Use the **Split Transaction** page to distribute sales credit in whole or in part between one salesperson to another or among a group of salespeople. To split transactions, perform the following procedure.

### Prerequisites

Transaction must already exist

### Steps

1. In the **Revenue Type** column, select **Revenue** or **Non Revenue** from the drop-down list.
2. In the **Resource Name** column, enter the name of resource with whom you want to split the credit. Click **Go** to open a pop-up list.

3. You can use the Resource Number if necessary. The Resource Number column populates automatically if you select a resource name.
4. Enter the percentage or amount of sales credit each person is to receive in either the Split % or Split Amount column.
5. Enter User Comments if you wish.
6. If necessary, click **Restore** to return to the previously stored information.
7. Click **Update** to save your work

### **Guidelines**

The revenue sales credit for the must equal 100%. If the original salesperson is still eligible for sales credit he or she must be specified as a credit receiver. Non-revenue sales credit does not have the 100% constraint of revenue credit.

All adjustments made with the above process must be loaded before they are available for calculation.

## **Load Transactions - View Request Status**

### **Prerequisites**

Transactions must be collected.

### **Steps**

1. Enter parameters to narrow your search.
  - To select a Submission Date, click the calendar icon to open a pop-up calendar.
  - Use the drop-down list to select a Phase. All is the default.
  - Use the drop-down list to select a Status. There are 19 choices, but All is the default.
  - Search by Request ID number if you have the number available.
2. Click **View Log** in the Log column to display the [Process Log](#).

## Load Transactions - Submit Request

After transactions are collected and adjusted, they must be loaded into Oracle Incentive Compensation tables for calculation and payment. To load transactions, perform the following procedure:

### Prerequisites

Transactions must be collected.

### Steps

1. In the Parameters area, enter Load Date From and To in the first two fields. Click the calendar icon to open a pop-up calendar. These are required fields.
2. Enter a Resource Name in the next field. Click **Go** to open a pop-up list.
3. Optionally, enter the Resource Number.
4. Select a Load Method from the drop-down list.
5. Check the Perform Classification and Rollup check box if you want the transactions to be processed and move up the compensation hierarchy.
6. Click **Submit Request**.
7. Click **Refresh Data** to display updated information as the concurrent processing proceeds.

## Calculating Compensation

You can calculate compensation for all resources who have valid compensation plans, for all resources in the notify log file, or for resources you specify. This page, called Calculation Submission, is a summary page of all of the calculations that you have submitted. Use the search parameters at the top to display selected batch names. Then, click the batch name to go to a detail page or click **Create** to go to another detail page, where you can create a new calculation submission.

### Prerequisites

Transactions must already be collected and loaded.

### Steps

1. To find a particular batch name on the summary, use the search drop-down list at the bottom of the last page if there are a small number of batches. If there is a larger group to sort through, use the search parameters at the top of the page.
2. Enter a batch name or the first part of the name.  
**Note:** Entries in this field will act as wild cards, so any batch that begins with the entry is displayed after you click **Apply** in step 6.
3. Enter dates in the Calculate From or Calculate To fields to further narrow your search. Click the calendar icon to open a pop-up calendar.
4. You can also search by Calculation Type or Calculation Status by selecting from the drop-down list. The default setting for these two fields is All.
5. Click **Apply**.
6. Select the calculation batch from the results listing. Click the batch name to go to the Calculation Submission page.

## Calculation Submission

You can calculate compensation for all salespeople who have valid compensation plans, for all salespeople in the notify log file, or for salespeople you specify. Use this procedure to submit a batch for calculation. Calculation can be run as often as necessary until the transactions have gone through the payment process.

### Prerequisites

Transactions must already be collected and loaded.

### Steps

1. Enter a batch name.
2. Select the dates of the transactions to be calculated. You can click the calendar icon to open a pop-up calendar.
3. From the drop-down list, select the type of calculation to be submitted, either Commission or Bonus.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Next**.

Another page, also called Calculation Submission, appears, with the information you entered displayed and new choices to make.

6. In the Resource Option field, select one of three options from the drop-down list:
  - All Resources
  - Resources Specified by You
  - Resources in Notify Log

This enables you to calculate compensation for everyone, for a specially selected group, or limits it to just resources affected by recent changes to their compensation plan (See Guidelines).

7. Check any of the three check boxes as needed:
  - Entire Hierarchy
  - Concurrent Calculation
  - Incremental Calculation

See Guidelines for more information.

8. If necessary, click **Restore** to return to the previously saved information.
9. Click **Previous** to view the previous Calculation Submission page.
10. Click **Next** to proceed with submitting the calculation.

If you selected All Resources or Resources in Notify Log in the Resource Option field previously, the page that displays now will include the information you entered along with a Calculate button. Click it to initiate the calculation process.

If you selected Resources Specified by You previously, the page that displays includes a fields to enter the specific resources for whom you want to submit a calculation.

To enter specific resources for calculation, perform the following procedure.

### Steps

1. Enter the salespeople's names.
2. Their employee numbers populate automatically.

To create more blank rows, place the cursor in the final field and press Enter. The previous screen appears. Press Next to return to entering names.

3. When you have finished entering names, click **Calculate**.
4. If the calculation was successful, the Status field now shows Completed.
5. To view the Process Log, perform the following steps:
  - a. Return to the Calculation Submission page.
  - b. Enter the request ID for your transaction.
  - c. Click **View Log** in the Log column.

The Process Log appears and displays the information relating to your calculation process.

### Guidelines

The Status field displays the status of the calculation using these values:

- **Incomplete:** The calculation has not been submitted.
- **Complete:** The calculation has completed successfully.
- **Failed:** An error has occurred. You can run the calculation again, if necessary.
- **In progress:** The calculation is still in the processing of running.

Transactions with process dates that fall within the dates you specify will be included in the calculation.

If you have made a change that will affect the calculation, such as a rate table change, then the application lists in the Notify Log all salespeople and periods that are affected by the change. Select Salespeople in Notify Log to calculate all the salespeople affected by the changes made.

Following is an explanation of the sort parameters:

- **Entire Hierarchy:** If you selected Salespeople Specified by You or Salespeople in Notify Log, disable this option if you want to perform the calculation on the specific salespeople themselves rather than their hierarchy.
- **Concurrent Calculation:** If the calculation is large, select this option to run the calculation as a background process in the Concurrent Manager. After you submit a concurrent process, you can proceed to do other things while it completes the calculation. You may want to make a note of the concurrent process number in case you want to check the status of the process later on.
- **Incremental Calculation:** Use incremental calculations for most or all of your calculations. Everything that needs to be calculated is calculated.

## References

See [Calculation](#) for an explanation of calculation.

## Notify Log

The Notify Log automatically records every change in the system that affects calculation. The Notify Log lists what part of the calculation is affected and therefore must be rerun as a result of an event.

For example, when a new transaction is collected, all salespeople affected by that transaction are recorded in the log. Other events include changes made to rate tables, compensation plans, and classification rules. The log also records the point where calculation needs to restart.

## Prerequisites

Resources must exist. An event must have taken place.

## Steps

1. To search, click **Search** to use the NotifyLogDefault parameters or any searches you have already saved. To create a custom search, click **Personalize**.
2. Click any of the table headers that are links to sort the log on that particular column.
3. Use Previous and Next go move from the displayed rows to the ones before or after them.

## Notify Log Search

Use this page to customize search parameters in the Notify Log. Because the Notify Log Summary page may contain hundreds of entries, this search process is more efficient.

## Prerequisites

None

## Steps

1. Enter search parameters into the six fields in the Notify Log area. Parameters include:
  - Resource Name (text)

- Employee Number (text)
  - Start Date (text or click the icon for a pop-up calendar)
  - End Date (text or click the icon for a pop-up calendar)
  - Revert to State (drop-down list with 14 options. All is the default.)
  - Status (drop-down list with 5 options. Completed is the default.)
2. In the Display Options area, select which columns you want to be displayed in the search results page.
  3. Click a selection once in the Available Columns and then click the right arrow button in the center area to move the selection to the Displayed Columns list.  

You can also click an item in the Displayed Columns area and then click the left arrow to move it back to the Available Columns list. The double arrow buttons move the entire contents to the other side.
  4. From the drop-down list, select which parameter you want to use first to sort the list.
  5. Select Ascending or Descending from the drop-down list. Ascending is the default setting.
  6. Select second and third level sort parameters, if needed. These parameters can be sorted in an ascending or descending order.
  7. Select the number of rows to be displayed at a time.
  8. In the Save As area, give a name to your custom search. You can also use the default by leaving the Default check box checked.
  9. Click **Save** to save your search parameters. Or, click **Save and Apply Search** to go directly to searching.
  10. Click **Search** to initiate a search process. Click **Restore** to return to the previously saved information.

## Posting Submission - View Request Status

Use this page to view and submit requests for posting submissions.

## Prerequisites

### Steps

1. Enter parameters to narrow your search.
  - To select a Submission Date, click the calendar icon to open a pop-up calendar.
  - Use the drop-down list to select a Phase. All is the default.
  - Use the drop-down list to select a Status. There are 19 choices, but All is the default.
  - Search by Request ID number if you have the number available.
2. Click **Find** to search.

A result table appears if any records match your search parameters.
3. Click **View Log** in the Log column to see the Process Log, if one exists.

## Posting Submission - Submit Request

Use this page to submit a posting request.

### Prerequisites

Transactions must already be collected.

### Steps

1. Enter a Start Date and an End Date in the fields. Click the calendar icon to open a pop-up calendar.
2. Click **Submit Request**.

An information table appears.
3. Click **View Log** in the Log column to see a Process Log, if one exists. You cannot view the log while the Phase is pending.

## Payrun Search

Use this page to search for payruns. The results of your search are displayed as the Payrun Summary.

### Prerequisites

Payrun must exist.

### Steps

1. Enter a Payrun Name.
2. You can search for a payrun on any of these fields. Enter the full word or the first few characters ahead of the percent sign (%):

Payrun Name

Pay Period

Paygroup

Payrun Status

3. Click **Apply**.
4. Click **Clear** to delete all entered data before performing another search.

**Note:** To display all payruns, click **Apply** with no search criteria entered.

## Payments

On the Payments page you can view information about payruns, and you can click links to create a new payrun or view the Payrun Details page.

### Prerequisites

Payrun must have already been created.

### Steps

1. Click **Create** to go to the Create Payrun page.
2. Click the number in the Total column to go to the Payrun Details page.
3. Check the Remove check box at the left to delete a payrun.
4. If necessary, click **Restore** to return to the most recently saved information.
5. After making any changes, click **Update** to save them.

## Payrun Details

Use this page to find details on a specific salesperson for a payrun.

### **Prerequisites**

Payrun must already be created.

### **Steps**

1. Enter the Salesperson Name, Employee Number, or Analyst fields in the search parameters fields. You can use the first few letters or numbers of the entry and place them before the percent sign (%) to search.
2. Click **Apply**.
3. The search results will be displayed below.
4. Click **Download** to download to a file.
5. Click the Total Amount column to go to the Payrun Details page. Click the Payment Plan column to see details of the salesperson's payment plan.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your changes.

## **Create Payrun**

Use this page to create a payrun.

### **Prerequisites**

A resource must be created in Resource Manager and must be assigned to a paygroup.

### **Steps**

1. Enter a Payrun Name. This is a required field.
2. Select a paygroup from the drop-down list.
3. Select a pay period from the drop-down list.
4. Select a payment incentive type from the drop-down list.
5. Select a Pay Date. Click the calendar icon to open a pop-up calendar.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save the payrun.

## Payment Transactions

This page displays the details of a payment transaction for a specific resource, as listed on the Payrun Details page.

## Summary of 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.

### Prerequisites

Incentive Compensation Online Super User responsibility is required.

### Steps

1. Click the name of the report you want to view.  
The Salesperson Search page appears.
2. Enter search parameters and click **Go**.  
The Salesperson Search Results page appears.
3. Click the Salesperson Name to open the report.

These are the eight Compensation reports:

Year To Date Summary

Transaction Details Report

Compensation Group Hierarchy Report

Classification Rules Report

Commission Summary

Quota Performance

Commission Statement

Unprocessed Transactions

## Salespeople Search

Use this page to search for a specific salesperson's report.

### Prerequisites

Salesperson must exist in Resource Manager.

### Steps

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

2. Enter a name or employee number.

You can use a partial name or number followed by a percent sign (%) to perform a general search, such as for names beginning with the letter S. Or, leave the percent sign alone in the fields to list all possible salespeople in the search results.

3. Click **Go**.

4. The Salesperson Search Results page appears.

5. Click the Salesperson Name to open the report for that person.

6. To start over, click **Clear** to return the page to its original settings.

## Salesperson Search Results

This page lists the results of the search based parameters you entered on the Salespeople Search page. Click a name in the Salesperson Name column to view the report you requested for that person.

## Year To Date Summary

This report is an overview of a salesperson's achievements and commission earnings across the fiscal year. This report is accessible by default by the manager, salesperson, Incentive Compensation online super user, and analyst responsibilities.

The figures are grouped by period and by plan element. A Super User can control which plan element appears as a quota or bonus category through by checking the Quota Group check box 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.

## Transaction Details Report

This report shows transactional details of the specified salesperson and is used by analysts. The report offers a wide range of parameters from which to select. Enter an invoice number or order number, or select adjustment or processed dates using pop-up calendars. The adjustment status, calculation status, and transaction type can also be used as data filters, and all three provide drop-down lists for making a selection.

The Transaction Details report is configurable. For instructions on how to hide or show selected columns, go to Configuring reports section below.

## Compensation Group Hierarchy Report

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.

### Steps

1. Use the Salespeople Search window to search by Analyst, Name, or Employee Number.
2. If multiple search results appear, click the name that you need.

The Compensation Group Hierarchy Report opens.

3. If the resource belongs to multiple compensation groups, select one from the drop-down list.
4. Effective date defaults to today's date. You may change it by clicking the calendar icon to select a different date.
5. Click **Submit**.
6. Repeat steps 3 through 5 with other names and compensation groups as required.
7. Optionally, click a resource name in the table body to display a Year to Date Summary for that person.

## Classification Rules Search

Use this procedure to perform searches of Classification rulesets.

### Steps

1. Select the ruleset name from the list of values, and enter a search key in the Rule Name field, for example, FY01.
2. The Effective Date field populates with the current date, but any other date can be selected by clicking the calendar icon to the right of the field.
3. Use Clear to start over, or click **Go** after you have entered all of the necessary search information. The Rules Found page is displayed.
4. Click a rule to go to the Classification Rules Report for that rule.

The report generated displays the Rule Name, Revenue Class, and Expression. Click **Download** to generate an Excel report.

## Rules Found

This page displays the list of rules found by using the [Classification Rules Search](#) page. Click a rule to go to the Classification Rules Report for that rule.

## 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.

# Commission Summary and Quota Performance

## Commission Summary Report

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

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

### Steps

1. Select an Analyst from the drop-down list.
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 **Personalize** 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 **Download** at the end of the report to download the report as a file.

### Guidelines

If you want to download the report, be sure to select an analyst. That will keep the report a manageable size.

## 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 for instructions on how to hide or show selected columns, go to Configuring reports section below. This report can be navigated to from the Year to Date Summary report for given sales credit and for a specific plan element.

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.

## Unprocessed Transactions

This report shows records that have not been successfully loaded into Oracle Incentive Compensation from the API table to the Commission Header Transaction table. It also can show all the transactions in commission headers that have failed to

classify (identify revenue class) and also fail to roll up the compensation group hierarchy. It can be used by an analyst to isolate the problems in calculation results.

## System Parameters

This page is used to define the basic parameters of Oracle Incentive Compensation.

### General

1. Enter the name of your Oracle Incentive Compensation instance.
2. Select a Revenue Class Hierarchy from the list of values.

### General Ledger

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 sales compensation payments according to periods defined in a calendar associated with a set of books that are defined in Oracle General Ledger (see Oracle General Ledger Reference).

#### Prerequisites

None

#### 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.
2. You will then see displayed 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)

### 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.

## 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.

## 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.

## 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. If you want, enter search parameters by Schema, Table Name, or User Name.
2. 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.

## Columns

Use the Columns page to 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

None

### Steps

1. In the View drop-down list, select which columns you wish to view. Choices include Columns, Dimensions, Classification, and Primary Key.
2. Click **Apply**.
3. Use the drop-down list to narrow find the column name you need.

For Columns or Dimensions, the following steps apply:

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

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

For the Classification and Primary key selections, the fields are different. For Classification, [unfinished]

## External Table Join Conditions

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

### Steps

1. 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.*
2. Enter a name for the condition in the Name column. This is a required field.
3. In the Usage column, select Collection or Calculation from the drop-down list. This is a required field.
4. Enter the source table. You can click **Go** to open a pop-up list. Click your selection to enter it into the field.
5. The Alias is system generated.
6. 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.
7. Click **Columns** in the External Columns column to another page where you can specify source and destination columns.
8. If you want to remove a line, check the Remove check box and the line will be deleted the next time **Update** is clicked.
9. If necessary, click **Restore** to return to the previously saved information.
10. Click **Update** to save your changes.

## External Table Join Conditions - External Columns

Use this page to indicate which external columns to use from an external table. The table join conditions are defined on the [External Table Join Conditions](#) page.

### Prerequisites

External Tables must be joined.

### Steps

1. Enter a source column name from an external table in the left hand column.  
Click **Go** to search. You must enter a minimum of four characters. Choose a column name from the results in the Select pop-up window.
2. Enter a destination column name in the right hand column.  
This column uses the same search method as in step 1.
3. Continue adding pairs of columns as necessary.
4. Click **Update** to save your work. Click **Restore** to return to the previously saved information.

## Accumulation Periods

Use the **Accumulation Periods** page to select the period status of your accumulation periods, verify their Status, or freeze them so they can be opened for a year-to-date summary by a sales rep using Oracle Sales Online.

Most of the Accumulation Periods page is read-only information. Only the Period Status and Freeze columns are changeable.

The period status can be set to Open, Closed, or Permanently Closed. If a period is permanently closed, it cannot be opened.

### Steps

1. Select a year from the drop-down list and click Apply.  
The accumulation periods for the selected year are displayed.
2. Change the period status by selecting Open, Closed, or Permanently Closed from the drop-down list.
3. Optionally, check the Freeze check box to enable a Year To Date summary.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your changes.

## Revenue Class

Revenue classes are user-defined categories of business revenue used to determine whether sales credit is applied toward a compensation payment. Revenue classes are placed in hierarchies composed of broader revenue classes at the top, or root, with subclasses as children of the root. A revenue class hierarchy makes it possible to pay compensation for broader revenue classes without specifying all possible subclasses in a compensation plan. See [Defining a Hierarchy](#). Perform the following procedure to define a revenue class.

### Prerequisites

None.

### Steps

1. The Revenue Class page displays all revenue classes that have been already been defined. To define a new revenue class, enter the name in the first blank Name field.
2. Optionally, enter a description. The description often is the same as the name.
3. Select a Liability Code and Expense Code if needed to integrate with Accounts Payable.
4. To search for liability codes and expense codes, click **Go** to open a pop-up list. Use sort parameters in the field to narrow your search.
5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your work.  
A Confirmation message displays across the top of the page when the save is successful.
7. To define a revenue class hierarchy, start at the [Hierarchy Types](#) page. That is also the place to add or delete nodes of the hierarchy.

## Rulesets

A classification ruleset is used to classify sales transactions to determine the appropriate revenue class for a transaction, and to generate account codes.

Depending on its revenue class, a transaction is matched with a compensation plan and a compensation amount is calculated to be paid for the transaction.

The Rulesets page lists all rulesets that have already been created. To view or edit a ruleset, find it and click **Rules**. Or, use the Saved Searches drop-down list. Click **Personalize** to create a custom search.

Use the following procedure to create a revenue classification rulesets and account generation rulesets for integration with Accounts Payable.

### Prerequisites

Revenue Classes have been created and the user-defined flexfields of the CN\_COMMISSION\_HEADERS table have been defined.

### Steps

1. In the first blank row of the Ruleset Name column, specify a name for your ruleset.
2. Assign active start and end dates. You can click the calendar icons to open a pop-up calendar. These fields are required.
3. Select a ruleset type from the drop-down list. This is a required field.
4. If necessary, click **Restore** to return to previously saved information.
5. Click **Update** to save the ruleset.
6. Click the **Rules** link in the Rules column to display the Rules Hierarchy. See [Rules Hierarchy](#) for complete information on this page.
7. On the Rules Hierarchy page, click the Rule Name link for the rule that you have just created.
8. The Create Rules page appears.
9. On the Create Rules Page, click **Create Child**.  
The Rules Form appears.
10. Define your classification rules on the Rules Form and return to this Form when completed.
11. For every Ruleset that has new or changed rules, click **Synchronize**.

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

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

### **Guidelines**

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

A hierarchy of rules can be defined for each ruleset.

Every rule must have at least one attribute.

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

If you specify high and low values in a rule condition, the values must be numeric, not alphanumeric.

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

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

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

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

### **Troubleshooting**

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

## Rules Hierarchy

Use the Rules Hierarchy page to define the classification rules. From the Rules Hierarchy page you can access these three pages by clicking links:

[Create Rules](#) - Click the rule name in the Rule Name column

[Rule Attributes](#) - Click **Attributes** in the Rule Attributes column

[Build Expression](#) - Click **Expressions** in the Rule Expression column

Perform the following procedures to define new classification rules.

### Prerequisites

Classification Ruleset has been created.

### Steps

1. On the Rules Hierarchy page, click the ruleset that you have just created. This takes you to the [Create Rules](#) page.
2. Click **Create Child**.
3. In the Rule name field, assign a name to the rule that you are about to define.
4. Enter a revenue class in the Revenue Class Name field. You can click **Go** to open a pop-up window. Click a name on the list.
5. If necessary, click **Restore** to return to the previously stored information.
6. Click **Update** to save your work.
7. On the Rules Hierarchy page click **Attributes**, next to the rule name, to go to the Rule Attributes page. See [Rule Attributes](#) to assign attributes to the rule.
8. To build an expression, click **Expressions** in the Rule Expression column. See [Build Expression](#) page.
9. To add rules in the hierarchy of rules, click the parent rule to go to the Create Rules page. Click **Create Child**.
10. When you have created all the rules you want, return to the Rulesets page and check the check box next to every ruleset that has new or changed rules.
11. Click **Update** to save your changes.

**Guidelines**

Name your rules after the revenue classes they describe. Rule names are not required to be unique.

## Create Rules

Use the Create Rules page to create a child or sibling to a rule on the [Rules Hierarchy](#) page.

**Prerequisites**

Ruleset must be created.

**Steps**

1. Click **Create Child or Create Sibling**.
2. In the Rule name field, assign a name to the rule that you are about to define.
3. Enter a revenue class in the Revenue Class Name field. You can click **Go** to open a pop-up window. Click a name on the list.
4. If necessary, click **Restore** to return to the previously stored information.
5. Click **Update** to save your work.

## Rule Attributes

Use the Rule Attributes page to assign single value, range value, and hierarchy attributes to rules. This page can be accessed from the Attributes link on the [Rules Hierarchy](#) page.

1. In each of the three areas, click **Go** to open a pop-up window list and select an attribute.
2. For the Single Value attributes, enter a value in the Value field.
3. For Range Value attributes, enter a low value and a high value in the fields.
4. For Hierarchy values, enter a hierarchy and a value.
5. Each area has a Not Flag column. Check the check box in this field to turn off the attribute temporarily without removing it.

6. 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*.
7. If necessary, click **Restore** to return to the most recently saved information.
8. Click **Update** to save your attributes.

## Build Expression

Use the Build Expression page to create expressions for use in linking attributes in rules. All expressions require two operands and an operator. To build an expression, perform the following procedure.

### Prerequisites

None

### Steps

1. The Build Expressions page displays any expressions that have already been built. To delete an expression, select it and click **Delete Expression**.  
If you delete an expression by mistake, click **Restore** immediately, before saving, to return it to the list.
2. Enter Operand1 and Operand 2. Enter search parameters and click **Go** to open a pop-up list. Click your selection from the list displayed.
3. Select an Operand from the drop-down list.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Build Expression** to save your work.

## Pay Periods

This page displays essential information about pay periods that have been set up for a particular calendar and enables you to activate a period.

### Prerequisites

Pay periods

### Steps

1. Select a calendar from the drop-down list.
2. Click **Apply**.
3. Activate a pay period that is currently inactive by selecting Active from the drop-down list in the Period Status column.  
Note: Active periods cannot be deactivated from this window.
4. If desired, select Previous Year or Next Year to view earlier or later pay periods.
5. Optionally, click **Restore** to return to the previously saved data.
6. Click **Update** to save your changes.

## Hierarchy Types

The Hierarchy Types page lists the types of hierarchy used in Oracle Incentive Compensation by name, along with Base Table, Primary Key, and Hierarchy Values, which are all required fields. To define a hierarchy, perform the following procedure.

### Prerequisites

Dimension Base table, primary key, and hierarchy values must exist.

### Steps

1. In the first blank Name field, enter the name of the new hierarchy.
2. Add the correct Base Table, Primary Key, and Hierarchy Values information.
3. Click **Go** to open a pop-up list. Use search parameters, followed by a percent sign (%), in the fields to narrow your search. Four characters are required to perform a search.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your work.
6. To add nodes to the hierarchy,
  - a. Click the Details link on the Hierarchy Types page to go to the [Hierarchies](#) detail page.
  - b. On the Hierarchies page, find the hierarchy by using the search drop-down list. Click the Details link to go to the [Intervals](#) page.

- c. On the Intervals page, assign a start date and an end date. Click the Details link to go to the [Hierarchies](#) page, where the nodes can be added.

## Hierarchies Detail

This page, called Hierarchies, displays the name of a hierarchy with a details link.

### Prerequisites

At least one hierarchy must exist.

1. Click the Details link next to the name of the hierarchy to go to the Intervals page.
2. To remove a hierarchy, check the Remove check box.
3. If necessary, click **Restore** to return to the previously stored information
4. Click **Update** to save your changes.

## Intervals

This page shows start and end dates, among the name of the root node, for a hierarchy. Perform the following procedure to make changes to hierarchy intervals.

### Prerequisites

Hierarchy must be created.

### Steps

1. To enter or change Start Date an End Date fields, type in new dates or use the calendar icon at the right of the field. Click the icon to open a pop-up calendar.
2. Click **Details** to go to the Hierarchies page. This page is different from the Hierarchies detail page. This Hierarchies page is where new nodes can be added to or deleted from a hierarchy.
3. Check the Remove check box to remove an interval.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your changes.

## Adding and Deleting Hierarchy Nodes

Use this procedure to define the parent-child relationship between all nodes in a hierarchy. You can add nodes to or delete nodes from a hierarchy.

This process is performed on the Hierarchies page, which is the main page for the hierarchy tree. To see a list of all the hierarchies in your implementation of Oracle Incentive Compensation, go to the [Hierarchy Types](#) page.

### Adding Nodes

To add nodes to a hierarchy, perform the following procedure.

#### Prerequisite

Hierarchy must already be created.

#### Steps

1. Starting at the Base Node, enter the names of all children of this node. Use the list of values to select the children.
2. To add a child node to the Base Node, or to any node, click the button in the Child column next to that node.
3. To define the next level in the hierarchy, click the plus sign in the hierarchy to open the child node below it.

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

4. Enter the names of all children of this parent.
  - a. Use the Add Child field to select child nodes.
  - b. Click **Go** to open a pop-up list.
5. Repeat steps 2 through 4 to define all nodes in the hierarchy.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your work.

#### Guidelines

By default, Oracle Incentive Compensation names the highest level root of every hierarchy base node. You can change this name.

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

## Deleting Nodes

To delete a node from a hierarchy, perform the following procedure.

### Steps

1. Expand the nodes by clicking the plus sign to the left of their names to get to the node that you want to delete.
1. Check the check box in the Remove column next to node.
2. If necessary, click **Restore** to return to the previously stored information.
3. Click **Update** to save your deletion. See Guidelines for important information.

### Guidelines

Hierarchy deletes are cascading. This means that if you delete a node, all children of that node are deleted along with it.

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

## 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 non-monetary credits must be converted to functional currency to be paid. To view, change, or remove a credit type, perform the following procedure.

### Steps

1. Use the search parameters at the top of the page if necessary.
2. Change the values in the Precision and Extended Precision fields if needed.  
Precision defines how fine a grain the credit type can be divided.
3. The Functional Currency cannot be changed by the user.
4. If desired, check the Remove check box next to a credit type to remove it from the listing.

5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your changes.

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. Click **Update** to save your work.

## Credit Type Conversion

Use **this** window to set conversion factors for converting one credit type to another, such as setting the conversion rate between the nonmonetary credit type and the functional currency. The credit types are defined using the [Credit Types](#) page.

### Steps

1. Enter a credit type in the From Credit Type column.  
Click **Go** to select from a list of values.
2. In the To Credit Type Column, indicate the credit type to which you want to convert the credit.  
Click **Go** to select from a list of values.
3. Enter a conversion factor. For example, \$100 credit can equal 10,000 Air Miles.
4. Enter effective dates in the Start Date and End Date fields.
5. To return to the previously saved version, click **Restore**.
6. Click **Update** to save your work.

## Quota Components

Use this page to create and edit quota components. These components are used in building compensation plans.

On the Quota Components page, you can provide a description of the component, specify whether it is revenue or unit based, indicate if the compensation is fixed or variable, and set the compensation to be based on a quota or simply on revenue amount. A check box is provided to indicate if the component requires computation.

To edit or create quota components, perform the following procedure.

### Prerequisites

None

### Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click the Component link in the side panel menu.

The Quota Components page appears.

3. The initial page displays three search parameters:

- Name
- Type
- Unit

Enter a name or partial name with a percent sign (%) and select a type and unit from the drop-down lists.

4. Click **Apply**.

A table appears containing any previously defined components that meet the search parameters.

5. To edit component information, enter description material, click the drop-down lists, or check the check box.
6. Click **Update** to save your changes. If necessary, click **Restore** to return to the previously saved information.
7. To create a new quota component, navigate to the last line in the quota components list and enter the name of the Component in the Name field.
8. Enter a short description for each component.
9. Select a Component type from the drop-down list.
10. In the Unit column, select Unit or Revenue from the drop-down list.

11. Check the Computed Flag check box if you want to use a formula to derive the value of the component.
12. Check the check box in the Remove column to delete quota components. You cannot delete components that are currently in use in compensation plans.
13. Click **Update** to save your changes.

### **Guidelines**

Quota Components are parts of a compensation plan, and can be of different types. Fixed components remain the same regardless of the salesperson's performance. Fixed components for Vision employees include Salary and Car Allowance. Variable components for Vision employees include calculations based on performance, and are based on a quota or can be nonquota based. Examples of Variable Pay Components at Vision Enterprises include 1st Year Support and Field License (Quota based) and Manager's Stipend (nonquota based).

Unit and Revenue, selected in the Unit column, indicate if compensation is revenue based or unit (Points) based. Revenue is used during currency conversion, but unit based components are not currency converted as they are point based.

## **Collection - Transaction Sources**

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. Enter the name of the transaction source in the first empty field in the Transaction Source column.
2. Enter a type, such as AR (Accounts Receivable), OC (Oracle Quoting - Forms), or an abbreviation for a legacy source.
3. 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.
4. Select a Key Column for the table. Click **Go** to open a pop-up list.

5. To remove a transaction source, check the remove check box and the line will disappear after the next update.
6. If necessary, click **Restore** to return to the previously saved information.
7. 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.

## **Collection - 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 pre-defined and cannot be deleted or modified. A line table is mandatory. To define source tables for sources that allow definitions, perform the following procedure:

### **Prerequisites**

Tables must be registered in the Tables subtab.

### **Steps**

1. Select a transaction source from the drop-down list.
2. Click **Apply**.

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

### Guidelines

If you are using one of the standard transaction sources, Receivables Posting or Order Booking, the source data is predefined and cannot be deleted or modified.

## Collection - Queries

The Queries page is divided into two parts. The Notification Query shows the exact query which will be used to create the Notification list of line-level transactions which are eligible for compensation. The Parameters subsection allows you to narrow your focus, for example, by start date and end date. The Collection Query area lists the exact tables and rows from those tables that you need to perform a collection.

The Parameters can be changed. Perform the following procedure to change or enter new parameters:

### Steps

1. Enter the name of the parameter in the field.
2. Click **Update**.  
The Type field populates.
3. While entering data, click the eraser icon to clear the field. If you want to return to the previously stored information, click **Restore**.

## Collection - Mapping

Use the Mapping page to specify what data is used to fill each of the destination columns when a compensation record is collected from the Transaction Source. Some mappings are mandatory, such as CN\_COMM\_LINES\_API.

Mapping can be direct or indirect. Direct mapping uses tables in the From clause of the Collection Query. Indirect mapping is used under special circumstances, for example, when you want to collect from a table after other collections are done. To map data, perform the following procedure:

### Prerequisites

Tables must exist in Transaction Source and destination.

**Steps**

1. Enter a source expression in the Source Expression field.
2. 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.
3. If you want to perform indirect mapping, click **Indirect** to open the Indirect Mapping Details area at the bottom of the page.
4. In the Indirect Mapping Details area, enter a join relationship or click **Go** and select one from the pop-up list.
5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your work.

**Guidelines**

In the inherited column, if === is displayed, the mapping is standard. If it has been changed, the display will look like this: =x=. To restore the original standard setup, click **Inherit**.

## Collection - Actions

The Actions page allows the user 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 collect 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, for example, any transaction under \$100.

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

**Steps**

1. 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
2. Enter the code in the Code field.

3. If necessary, click **Restore** to return to the previously saved information.
4. 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: transaction will appear in CN\_COMM\_LINES\_API but be marked as filtered.
  - Physically Delete: 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.

## Collection - Generate

After the setup is complete, use this 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. 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.
2. Click **Test Generate**.

A test version is generated.
3. 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.
4. Fix the errors and rerun the test generation until you are satisfied with the result.
5. You can click **Yes** or **No** in the Collect Flag to return to the Transaction Sources page and verify it or change it.

6. Click **Generate** to generate the actual Collection package.

## Collection - Runtime Parameter

Runtime parameters allow you to narrow the collection process, for example, by adding start date and end date parameters. This page allows you change the runtime values of your parameters.

### Prerequisites

Parameters must already be created.

### Steps

1. Select the parameter you want to change.
2. Enter a value in the Runtime Parameters field.
3. If necessary, click **Restore** to return to the previously saved information.
4. Click **Update** to save your changes.

## Defining Pay Groups

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

### Prerequisites

Calendars and related pay periods must be defined in GL and activated in Oracle Incentive Compensation. (See *Oracle Incentive Compensation Implementation Guide*.)

### Steps

The Pay Groups page lists all pay groups that have already been created. Use the search parameter fields at the top to search for a pay group.

1. Enter a name, date range, or calendar name. You can use partial entries in the name and calendar fields followed by a percent sign (%).
2. Click **Apply**.

To create a new pay group, perform the following procedure:

1. In the Name field, assign a unique name to the pay group.

2. Enter a description.
3. Select an effective start date and end date for the pay group. Click the calendar icon to use the pop-up calendar.
4. Select a calendar from the list of values. Click **Go** to open a pop-up window list.
5. Select a period type from the list of period types that were defined for the selected calendar. Click **Go** to open a pop-up window list.
6. If necessary, click **Restore** to return to the previously saved information.
7. 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 list of values, 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 commissions are summarized for payment.

Each pay group can be associated with one unpaid pay run at any time.

See [Assign Pay Groups](#) to assign the pay group to salespeople.

## Interval Types

This page is used to define interval types. Intervals are used to set the time period during which commission is calculated. This page displays all intervals that have been created and enables creation of new intervals. To select an interval type, perform the following procedure.

### Steps

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

1. In the Name column, click the name of the interval.  
The Interval Numbers page displays.
2. 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:

### Steps

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.

## Interval Numbers

This page is appears when you click an interval on the Interval Types page. It shows the interval numbers based on the parameters of your selected interval. For example, If you selected a Quarter interval, with a period of a Month, the months of January, February, and March will display the same interval number. See [Define Interval Types](#).

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.

## Payment Plans

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

In this new version of Oracle Incentive Compensation, the recovery schedule and draw amount can be set up independently of the earnings for the period, and you can waive a recovery amount due from a salesperson. **Note:** For Waive Recovery to work properly, the pay periods must be defined correctly.

The Payment Plans page lists all payment plans already defined in Oracle Incentive Compensation. To search for a plan, enter all or part of the name in the Name field at the top of the page and click **Apply**.

To define a new payment plan, perform the following procedure.

### Prerequisites

None.

### Steps

1. In the Name column, assign a unique name to the payment plan.
2. 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.
3. 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.
4. 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.
5. 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.

6. 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.
7. Select a recovery interval from the drop-down list. The default setting is the same as the pay interval.
8. 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.
9. If necessary, click **Restore** to return to the previously saved information
10. Click **Update** to save the payment plan.

The payment plan can be 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.

## **Payroll 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. Enter the changes. Click **Go** to open a pop-up list of choices, or the calendar icon to open a calendar.
2. Check the Remove check box if you want to eliminate the plan element to pay element mapping.
3. Check 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**.

4. You can click the Element Input link to go to the [Pay Element Input Values Mapping](#) page.
5. Click **Update**.
6. 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 use 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.

## Pay Element Input Values Mapping

Use this page to map table and column names to Payroll input values. Input values that have already been mapped are displayed. To map table and column names to Payroll input values, perform the following procedure.

### Prerequisites

Plan elements and pay elements must already be created.

### Steps

1. Enter a table name in the first blank field in the Table Name column. Click **Go** to open a pop-up list.
2. Enter a column name in the Column Name column. Click **Go** if needed.
3. In a line that is not yet saved, click the eraser icon to clear the fields.
4. To remove a saved line, check the check box in the Remove column.
5. If necessary, click **Restore** to return to previously saved information.
6. Click **Update** to save.

## Attainment Schedule Summary

Attainment schedules are used in the Compensation Contract where earnings for each level of achievement are displayed. This window enables you to add, delete, or edit existing attainment schedules.

### Steps

1. Click a schedule name in the right column to open the Define Attainment Schedule window.
2. To add a new attainment schedule, type the new name into the blank field and click **Update**.
3. If necessary, click **Restore** to return to the previously saved information. Or, click the Clear icon to erase what you have typed in the blank field before you update it.
4. If necessary, select the Remove check box and click **Update** to remove an attainment schedule.

## Define Attainment Schedule

This page enables you to define the specific levels of compensation based on percentage of earnings. The name of the attainment schedule appears at the top, and tiers can be added or removed easily. To add a new tier, perform the following procedure:

### Steps

1. Type the percent information into a blank field
2. Click **Update**.

To delete a tier, perform the following procedure:

1. Select the Remove check box beside that tier.
2. Click **Update**.
3. Optionally, click **Restore** to return all tiers to the settings they had at the last update.

## Job Titles

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

### Prerequisites

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

### Steps

Select a Job Title by clicking its name.

### Guidelines

If using Oracle Human Resources Management System (HRMS), the Job Title information is read from HRMS via Oracle Resource Manager. If not using HRMS, please refer to Oracle Resource Manager for information on how to define resources.

## Resource Details - Job Titles

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

### Prerequisites

Incentive Planning Analyst responsibility is required. Resources have been set up in Oracle Resource Manager.

### Steps

1. Enter a role name in the first blank field in the Role column. You can click **Go** to the right of the Role field to open a pop-up list.
2. Click a Role name in the pop-up list, or enter search criteria in the Name field and select a role from the search results.
3. Enter a Start Date and an End Date for the term of the assignment. Click the calendar icon to open a pop-up calendar.
4. If necessary, click **Restore** to retrieve the previously saved information.
5. Click **Update** to save your work.

## User Summary

Use this page to find a User. Then, use the User Access Detail window 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

Select a User by clicking his or her name.

## User Access Detail

Use this page to set the access privilege of users with finance manager responsibility. All of the user's compensation groups and organizations are displayed.

### Prerequisites

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

### Steps

1. Enter a compensation group in the Compensation Group column, or click **Go** to select one from the pop-up list.
2. In the Organization column, select an organization from the drop-down list.
3. Select an Access Level of Update or View from the drop-down list.
4. To remove a listing, check the Remove check box and click **Update**.
5. If necessary, click **Restore** to return to the most recently saved information
6. Click **Update** to save your changes.

## Settings

On the Settings page, you can select the Transaction Calendar and write Contract Text for a compensation plan.

### Prerequisites

The Transactions Calendar must be predefined so that it can be assigned through the Settings page. Incentive Planning Super User or Incentive Analyst responsibility is required.

### Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Settings from 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. In the Contract Text area, enter text as required into the fields. For club eligibility, write out the details, such as 100% Eligible.
5. In the Approver area, enter your name, title, and organization.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your changes.

## Seasonality Schedules

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.

To begin to view, edit, or create seasonality schedules, perform the following procedure.

### Prerequisites

None.

### Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Seasonality on the side panel menu.  
The Seasonality Schedules page appears. Seasonality schedules that have already been created are displayed.
3. If necessary, use the search parameters at the top of the page to search by fiscal year or by schedule name. Select the fiscal year from the drop-down list or enter all or part of the name before the percent sign and click **Search**.
4. Click the name for the schedule you wish to view or edit.  
The [Seasonality Schedule Details](#) page for the schedule appears.
5. To create a new schedule, click **Create**.
6. The [Create New Seasonality Schedule](#) page appears.
7. To remove a schedule, check the Remove check box and click **Update**.

## Seasonality Schedule Details

Use the Seasonality Schedule Details page to view or edit a seasonality schedule. Be sure that after any changes are made, the Table Total adds up to 100 percent.

1. In the Seasonality area, the percentages for each month are displayed. To change the numbers in the Percentage column, edit the field. Note: The numbers in the Percentage column must add up to 100 percent.
2. If necessary, click **Restore** to return to the previously saved information.
3. Click **Update** to save your changes.
4. Click **Validate** to validate your seasonality schedule. After it is validated, the Validation Status in the top section of the page reads VALID. If the percentages do not add up to 100 percent the schedule cannot achieve a Valid status.

### Guidelines

You must click **Update** to save a new seasonality schedule *before* clicking **Validate**. If you click Validate without clicking Update first, it will return all of the percentage entries to 0.

## Create New Seasonality Schedule

This page is used to create new seasonality schedules. It is accessed by clicking **Create** on the [Seasonality Schedules](#) page.

### Prerequisites

None.

### Steps

1. Enter a name for the new seasonality schedule in the name field. This is a required field.
2. Enter a description. This is a required field.
3. Select a year from the drop-down list.
4. If necessary, click **Restore** to return to the previously saved information.
5. In the Seasonality area, enter the percentage of annual quota in each field next to each month. Be sure that the percentages add up to 100 percent.
6. When the schedule is the way you want it, click **Update** to save your work.
7. Click **Validate** to verify that your percentages add up to 100 percent. If validation is successful, then the Validation Status in the top area of the page reads *Valid*.

### Guidelines

You must click **Update** to save a new seasonality schedule *before* clicking **Validate**. If you click **Validate** without clicking **Update** first, it will return the all percentage entries to 0.

## My Compensation Groups/My Salespeople

This page, accessed through Oracle Sales Online, enables a manager to see compensation plans for which they are responsible and also the resources to whom the plans can be assigned. Compensation plans can be distributed in the My Salespeople area.

To view your compensation plans and distribute them, perform the following procedure.

### Prerequisites

Compensation plans must already be created.

### Steps

1. Select an effective date by clicking the calendar icon and choosing a date.
2. Click **Apply**.  
Any compensation plans that are effective are displayed under My Compensation Plans.
3. In the My Salespeople area, check the Distribute check box next to a salesperson to indicate that you want to distribute a plan to that person.
4. Click **Distribute** to perform the distribution to the selected salespeople.
5. To distribute the compensation plan to all salespeople, click **Distribute All**.
6. At any time before clicking the distribute buttons, click **Restore** to return to the previously saved information.

## 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. The 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 7 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 Forecast amount/TARGET and the output forecast formula is Rate Table Result\*Forecast amount. The input formula expresses the proportion of the forecast amount to the quota, and the output formula applies a commission rate to the forecast amount.

The commission rate chosen depends on the salesperson's achievements to date as compared to the commission rate tiers.

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

## Summary of Compensation Reports for Oracle Sales Online and Oracle Partners Online

Three reports are available for users of Oracle Sales Online and Oracle Partners Online. Click the link to open a report, and enter the search parameters on the page that appears.

### Submit Concurrent Request - Submit Payment Request

Use this page to submit concurrent requests or payment requests.

#### Prerequisites

#### Steps

1. In the Request Name field, select Pay Payrun, Delete Payrun, or Create Worksheet from the drop-down list.
2. Select a Payrun name from the drop-down list.
3. Click **Submit Request**.

A new row appears in the table, with a Request ID number in the first column.

4. Click **Refresh Data** to update the table to reflect any changes you have made.

### Submit Concurrent Request - View Request Status

#### Prerequisites

#### Steps

1. Enter search parameters to narrow your request:
  - Request Name: Select from the drop-down list. All is the default.
  - Phase: Select from the drop-down list. All is the default.

- Status: Select from the drop-down list. All is the default.
  - Request ID: Enter the full name or a partial name with percent sign (%).
2. Click **Apply**.
  3. Any records found are displayed.

## Import Header Mapping

This page is Step 2 of the Imports Wizard. It is used to map source fields to target fields in the application. The process then continues on to Step 3: Review, and Confirmation pages. Required fields are marked with an asterisk (\*).

### Prerequisites

Source fields must be defined in the file to be imported.

### Steps

1. Use the fields at the top of the page to load an existing mapping or save a new mapping.
2. Click a source field in the first column to highlight it.
3. Click the target field in the second column. Target fields marked with an asterisk (\*) are required.
4. Click the right arrow button to move the mapping to the third column.
5. View the Preview window to see what your mapping looks like.
6. Click **Next** to save and move to Step 3: [Review](#).

## Review

This page is Step 3 of the Imports Wizard. It is used to review your mapping of source fields in a file to target fields in Oracle Incentive Compensation. The process then continues on to the Confirmation page. Required fields are marked with an asterisk (\*).

### Prerequisites

Source to target mapping must already be done.

### Steps

1. Review the general information and mapping on the page.
2. If all the information is correct, click **Import**. The [Confirmation](#) page appears.
3. If the information is not correct, click **Cancel**, and then return to the [Import Header Mapping](#) page to make corrections.

## Confirmation

This page is Step 4 of the Imports Wizard. It confirms that your mapping of source fields in a file to target fields in Oracle Incentive Compensation has been submitted for processing.

### Prerequisites

None.

### Steps

1. Click **Finish** to go to the [Imports Search](#) page. You can check there to see if your import was successful.
2. If you want to perform another import, click **New Import**.

## Calculation Submission Step One

This is the first step in creating a new batch to submit for calculation. It specifies the name, dates, and type of the submission. After entering the necessary information, click **Next** to continue the calculation submission process.

### Prerequisites

Transactions must already be collected and loaded.

### Steps

1. Enter a batch name. Batch names work best if they describe something about the batch, including the date.
2. Select the beginning and end dates of the transactions to be calculated. You can click the calendar icon to open a pop-up calendar.
3. From the Calculation Type drop-down list, select the type of calculation to be submitted, either Commission or Bonus.

4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Next**.  
Another version of the page appears.
6. In the Resource Option field, select one of three options from the drop-down list:
  - All Resources
  - Resources Specified by You
  - Resources in Notify Log

This enables you to calculate compensation for everyone, for a specially selected group, or limits it to resources affected by recent changes to their compensation plan. If you select the second option, you must enter the names of the resources (See [Calculation Submission Step Two](#)).
7. Check any of the three check boxes as needed:
  - Entire Hierarchy
  - Concurrent Calculation
  - Incremental Calculation

See Guidelines for more information.
8. If necessary, click **Restore** to return to the previously saved information.
9. Click **Previous** to view the previous Calculation Submission page.
10. Click **Next** to proceed with submitting the calculation.

### **Guidelines**

Here is an explanation of the three sort parameters:

- **Entire Hierarchy:** This option runs calculations for every resource. If you selected a resource option of Salespeople Specified by You or Salespeople in Notify Log, be sure to disable this option.
- **Concurrent Calculation:** If the calculation is large, select this option to run the calculation as a background process in the Concurrent Manager. After you submit a concurrent process, you can do other work while the calculation runs. Make a note of the concurrent process number so you can check the status of the process later on.

- **Incremental Calculation:** Incremental calculation works with only the new or specified transactions, so it takes less time to run. Because of this efficiency, you should use incremental calculations for most or all of your calculations.

## Calculation Submission Step Two

This page displays after you have selected a resource option and clicked **Next**. If you selected Resources Specified by You as the resource option previously, the page also contains includes a table to enter the specific resources for whom you want to submit a calculation. If you selected an option other than Resources Specified by You, simply click **Next** to proceed to the third step.

If you did select Resources Specified by You, you must enter specific resources for calculation. To do this, perform the following procedure.

### Prerequisites

Resources must have a complete compensation plan.

### Steps

1. Enter a resource name or number.
  - a. Click **Go** to open a Select window. Enter a name or number or partial name or number and click **Go**.
  - b. If you selected a name, the resource number populates automatically. Alternately, if you selected a number, the name populates automatically.
  - c. To create more blank rows, enter the number of the additional rows you need in the No of additional reps field and click **Update**. The additional rows appear on the table.
2. When you have finished entering names, click **Next**.
3. Another version of the Calculation Submission page appears containing step three.

## Calculation Submission Step Three

This page is the last step before you submit the batch of transactions for calculation. The page resembles the previous step two page, except that at the bottom are a Previous and a Calculate button. Click **Calculate** to initiate the calculation process.

## Calculation Submission Step Four

This page displays the status of the calculation for transaction batches you submitted. If the calculation was successful, the Status field shows Completed. If the calculation was unsuccessful, the Status field indicates a Failed condition. If your calculation failed, look at the Process Log. See Guidelines for more information.

To view a process log, perform the following steps:

1. Return to the [Calculation Submission](#) summary page. A quick way is to click the Calculate subtab on the Transaction tab.

The Calculation Submission summary page appears.

2. Click **Process Log** in the Process Log column.
3. The Process Log appears and displays the information relating to your calculation process.

### Guidelines

The Status field displays the status of the calculation using these values:

- Incomplete: The calculation has not been submitted.
- Complete: The calculation has completed successfully.
- Failed: An error has occurred. You can run the calculation again, if necessary.
- In progress: The calculation is still in the processing of running.

Transactions with process dates that fall within the dates you specify will be included in the calculation.

If you have made a change that will affect the calculation, such as a rate table change, then the application lists in the Notify Log all salespeople and periods that are affected by the change. Select Salespeople in Notify Log to calculate for all the salespeople affected by the changes made.

## Compensation Plan Saved Searches

To create a customized search, perform the following steps. You can access this page by clicking Personalize on the Compensation Plan page.

1. In the Compensation Plan area, enter a compensation plan name in the Name field.

2. Enter an effective date, if desired. You can use the calendar icon to the right of the Effective Date field.
3. In the Display Options area, select which columns you want to display in your search. Use the arrow buttons in the center of the display to move columns back and forth between the Available group on the left to the Displayed Columns group on the right. Use the up and down arrows at the far right to move through the display in the displays.
4. Select how you want to sort the rows. The application allows for three levels of sorting. In the left hand three fields, choose your sort parameters from the drop-down lists. In the right hand fields, select ascending or descending order from the drop-down lists.
5. Enter a number of rows you want to have displayed at a time.
6. In the Save As area, give your search a unique name.
7. Click **Save** to save it, or Save and Apply Search to use the new saved search.
8. Check the Default check box if you want your new customized search to be the default selection on the Compensation Plan page.

### **Guidelines**

If you are creating a customized search, you can set the number of rows that you want to display in step 5. However, you *cannot* change the number of rows that are displayed in any saved search that is seeded data. In addition, you *cannot* change the number of rows displayed in a customized search by clicking the Profiles icon in the upper right part of the page.