

Oracle[®] Sales Compensation

Implementation Guide

Release 11*i*

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ORACLE[®]

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Oracle Sales Compensation Implementation Guide, Release 11i

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Preface

Welcome to the **Oracle Sales Compensation**, Release 11i, suite of applications.

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

This preface explains how this Implementation Guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

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

Related Documents

For more information, see the following manuals:

- *Oracle Applications, Product Update Notes, Release 11i* (A85297-01)
- *Installing Oracle Applications, Release 11i* (A87333-01)
- *Oracle Applications Release 11i Concepts* (A82932-01)
- *Implementing CRM Applications* (A86291-01)
- *Oracle CRM Foundation Components Concepts and Procedures* (A86099-01)
- *Oracle CRM Foundation Technical Reference Manual* (A86150-01)

- Oracle CRM Foundation *Implementation Guide* (A86122-01)
- *Implementing Oracle CRM:ERP Functional Checklist* (available on Oracle MetaLink)
- *Implementing Oracle CRM Functional Checklist* (available on Oracle MetaLink)
- Oracle Sales Online *Technical Reference Manual* (A86175-01)
- Oracle Sales Compensation *Concepts and Procedures* (A86673-01)

Implementing Oracle Sales Compensation

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

Related Documentation and Resources

You may also wish to consult the following documentation:

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

Overview of Oracle Sales Compensation

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

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

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

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

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

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

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

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

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

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

Navigation

The navigator displays:

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

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

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

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

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

System Integration

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

- Collect sales transaction data from Oracle Receivables, Oracle Order Capture, and other sources
- Pay compensation through payroll (internal employees) or an accounts payable (internal or external people and groups) system
- Maintain sales roles and compensation groups
- Maintain salespeople information
- Generate reports (see samples reports in the appendix of this Guide) related to compensation and other useful sales benchmarks

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

Overview

Oracle Sales Compensation exchanges information with other products within the Oracle e-business suite. Transactions, the raw material that fuels the Oracle Sales Compensation, are primarily derived from Oracle Receivables and Order Capture or Order Management.

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

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

- Invoices

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

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

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

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

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

- Oracle Sales Online provides a sales performance and compensation forecasting tool for sales representatives and managers, based on current compensation plans. It is also a means for monitoring sales force performance through rankings. Salespeople can view their compensation summary and break down their commissions by deal, product line, period, adjustments, or transactions. They can “blind-rank” themselves to measure their performance against a group of peers. They can also use Sales Online to view projected compensation based on opportunities they enter into the system or commit to the forecast.
- Compensation information is made available to Oracle Sales Intelligence.

Foundation Modules and Dependencies

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

Order Management is a new module in R11i of Oracle's e-Business suite. Unlike Order Capture, it is a salable product, not a foundation module. However, in the event that Order Management is purchased and installed, it serves as the mechanism by which Sales Compensation accesses Order Capture information.

Oracle Sales Online

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

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

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

Prerequisites

System Administrator responsibility is required.

Steps

1. In the System Administrator Navigator, select Security.
2. Expand the Security menu by double-clicking on Security.
3. Double-click User.
4. Double-click Define.
5. Find the Oracle Sales Online User's name by enabling this Form in the Query mode. From the Menu bar, select **View > Query by Example > Enter**. (The F11 key performs the same function.)

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

Setting Up Resource Manager

In addition to the pre-defined Role Types and Role Information, you can define new Role Types and Roles. Set up Resource Manager by following these procedures.

Defining Role Types

A Role Type is a category of roles associated with a particular CRM module. Oracle Resource Manager is delivered with pre-defined Role Types for all CRM modules. Use this procedure to define additional custom Role Types for your enterprise.

Steps

1. In the CRM Resource Manager responsibility, navigate to **Setup > Role Types**.
The Application Object Library window displays existing Role Types.
2. Use the down arrow to scroll to the bottom of the list of Role Types.
3. Enter the name of the new Role Type in the blank field at the bottom of the list.
4. In the Meaning field, enter the CRM module for which this Role Type is created.
5. Choose File > Save to complete the Role Type definition.

Defining Roles

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

Prerequisites

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

Steps

1. In the CRM Resource Manager responsibility, navigate to **Setup > Roles**.
The Roles window displays fields you can use to define a role.
2. Enter your values in the Code and Name fields. Choose a Role Type from the list of values.
3. Select the Active box to make the Role active. Select one or more of the job title boxes—Manager, Member, Admin, Lead—to associate the Role to job titles.
4. Use one or more of the Job lines to describe jobs associated with the Role.
5. Select File > Save to complete the Role definition.

Resource Manager does not use profile options.

Resource Manager does not use Workflow processes.

Reviewing Information and Administering Sales Compensation

A single sale is credited through a hierarchy of salespeople and managers by using a structure of compensation groups. Define compensation groups and build hierarchies of compensation groups using Groups in Oracle Resource Manager. Assign sales roles in the Roles tab and specify Sales Compensation in the Usages tab when you define the group. Only then can compensation groups be viewed in Oracle Sales Compensation.

To view Compensation Groups, go to Navigator and choose **Sales People > View By Compensation Groups**.

In the expanded hierarchy, right-click a group and choose **Open**.

The Compensation Groups window displays the selected group.

Use this procedure to review information about a salesperson, assign sales roles and payment plans, and administer the salesperson's compensation.

Prerequisites

The salesperson must be defined.

Steps

1. Select a salesperson from the Navigator or query up the salesperson. Go to **Details**.
2. To assign a pay group to a salesperson, in the **Salesperson** tab use the list of values to choose the pay group. Then assign start and end dates.
3. If you want to temporarily withhold payment for this salesperson, then in the **Compensation** tab in **Resource Manager** select **Hold Payment** and select a reason for the payment hold.

The salesperson's payment is not generated when the pay group is submitted for payment.

4. To reassign a salesperson to a new role, in the **Roles** tab review the salesperson's assigned sales roles and see compensation groups in the **Groups** tab.
5. To assign a sales role to a person, select the **Roles** tab. From the list of values choose the sales role and then assign start and end dates.
6. To assign a new compensation group, select the **Compensation Plans** tab. Review the salesperson's assigned compensation plans and plan elements.
7. Optionally, click **Compensation Summary** or click **Compensation Details** to view the salesperson's compensation information.
8. In the **Payment Plans** tab, review the salesperson's payment plan information.
9. To assign a payment plan, in the **Payment Plans** tab select the plan from the list of values and enter start and end dates.
10. To pay a salesperson either a minimum or maximum amount regardless of commissions earned, then enter the amount.
11. To deduct the minimum payment from later commissions, select **Recoverable** and, optionally, enter a maximum recoverable amount.
12. To assign a commission earned above the maximum payment to a later pay run, select **Pay Later**.
13. Save your changes.

Guidelines

When you enter start and end dates, the dates must fall within the range of effective dates for both items being assigned, for example, the salesperson and the sales role.

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

If you want any Salesperson to view his/her Compensation Reports in a nonfunctional currency, ensure that you select the Salesperson's currency in the Compensation Currency field on the Compensation tab in Resource Manager.

Oracle Accounts Payable

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

When a Payrun has been processed (Paid status against the Payrun name), the Salespeople Sub-ledgers are updated to reflect the amounts paid in the appropriate accounts and balances. Payrun details would also have been sent to Oracle Accounts Payable Invoices Interface Table.

The records in `cn_payment_lines_interface` Table are mapped to the invoice interface in Oracle Accounts Payable. The mapping has been done as follows:

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

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

The Liability Account will also be mapped to the Oracle Accounts Payable Interface. This will be done using the account generator, accessible via the Ruleset Form.

Setting Up Planning Module

Screen List for Planning Module

Tab	Subtab	Screen name	
Salesforce	Summary		
		Salesforce Summary	
			Salesperson Details
			Job Title Details
			Sales Role Detail
			Salesforce Pay Element Details
Quota	Allocate		
		My Compensation Groups	
		Quota Modeling Summary	
			Quota from Field
			Assign quota
			Compensation Plan History
			Compensation Plan
			Add To-Be-Hired

Tab	Subtab	Screen name	
			Salesperson Detail
	Approve		
		Search and Result screens	
		Approve Contract	
	Distribute		
		Search and Results screens	
		Distribute Contract	
	Activate		
		Search and Results screens	
		Activate Compensation Plan	
Reports		Search and Results screens for each report	
	Analysis		
		Summary Analysis Reports	
			Quota Model Summary
			Average Quota Summary
			Overassign Quota
			Quota Range Summary
	Validation		
		Summary Validation Reports	
			Overlay Summary
			To-Be-Hired Report
			Transitional Salespeople
	Generation		
		Summary Generation Reports	
			Plan Status
			Sales Role and Compensation Plan Mapping
Setup			
	Sales Roles		

Tab	Subtab	Screen name	
		Sales Role Summary	
			Sales Role Detail
			Edit Computed Component Formula
			Define Quota Anchors
	Components		
		Quota Components	
	Job Titles		
		Job Title Summary	
			Job Title Detail
	User Access		
		User Summary	
			User Access Detail
	Plan Text		
		Default Contract Text	
	Activate Roles		
		Generic Push	
	Attainment		
		Attainment Summary	
			Attainment Details

Quota Components

Use this screen to create Components and specify their type.

Components are parts of a Compensation Plan. Examples of Fixed Pay Components are Fixed Salary and Car Allowance. Examples of Variable Pay Components for a Personal Computer Salesperson at Global Computers are Multimedia PC Sales, Professional PC Sales and Maintenance Service.

Prerequisites

None

Steps

1. In the Application, choose **Setup > Components**.
2. Enter the name of the Component.
3. Enter a short description for each component.
4. Select a Component type.
5. Check the Compute Flag if the value of the component is to be derived from a formula.

Guidelines

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

Component types are either Fixed or Variable. If Variable, select either Quota Based or Non Quota Based. In the Vision example, Fixed Salary Component and Car Allowance Component are both Fixed type. Multimedia PC Sales Component, Professional PC Sales Component and Maintenance Services Component are Variable Quota Based type.

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

Attainment Schedule

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

Create your Attainment Schedules under the **Setup** tab > **Attainment**.

Sales Role Summary

Use this screen to find a Sales Role.

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

Prerequisites

Sales Roles must be created first. If they have not been created, click Create to go to the Create Sales Role screen.

Steps

Select a Sales Role name to go to its details.

Sales Role Detail

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

Prerequisites

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

Steps

1. On Target Earnings: enter Total Earnings if Salesperson achieves 100% of Quota.
2. Club Eligible: check box if this Role is entitled to Club participation on achieving Club rules.
3. Rounding factor: for example, input 1000 if Quota figure that will end up on the Compensation Plan is to be rounded up to the nearest 1000.
4. Determine minimum and maximum Quotas: enter the range of Quota figures that this Role should have.
5. Enter the Compensation Plan Level.
6. Select an Attainment Schedule applicable for this Role's Compensation Plan.
7. Determine Fixed Pay Components: select Fixed Components and enter ascending numbers against each Component to indicate the sequence that each Component is to appear in the Assign Quota and Quota From Field Salespeople screens. Enter the Fixed Pay Amount for each Fixed Component. (Vision example, if the Fixed Salary of a PC Salesperson is 50000, then enter 50000 against the Fixed Salary Component.
8. Variable Pay Non Computed Components: as above, select Components and enter sequential order of display.

If you want a Plan Element and a basic formula to be created in Production Module for you (relating to your selected Component), choose a Formula type, Rate Table and enter the new name of your Plan Element. The type of Formula

is driven by your Rate Table definition (example percentage tiers and percentage rates or percentage tiers and amount rates or tiers expressed in amounts with amount rates).

9. **Variable Pay Computed Components:** select Components and enter sequential order of display. Directions in Step 8 above apply here.
10. **Variable Pay Non Quota Components:** select Components and enter sequential order of display. Also enter the earnings figure at 100% achievement of target level.
11. **Map to Compensation Plan:** entering the name of the Compensation Plan here will enable it to appear in Production when the activation process has been run.

Guidelines

Entering the Quota range enables the Quota Range Report to be run. The minimum quota on the Sales Role Details screen will be picked up on the Minimum Quota field on the Quota Modeling screen 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.

Edit Computed Component Formula

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

Prerequisites

Components must be created.

Steps

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

Guidelines

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

Define Quota Anchors

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

Prerequisites

Rate Tables and Components must be created.

Steps

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

Guidelines

If the first tier of the Rate Table is 0 to 25%, enter 0 commission earnings against 0% attainment and then enter the commission earnings at the 25% attainment at the next line.

If the maximum attainment level is, for example, 200% of Quota and the maximum commission earnings are 2% of the transaction value, then, enter:

0 Percentage	0.00
25 Percentage	1.00
50 Percentage	1.10
100 Percentage	1.50
200 Percentage	2.00
9999 Percentage	0.00

Default Contract Text

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

Prerequisites

Super User responsibility is required.

Steps

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

Guidelines

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

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

Job Title Summary

Use this screen to find a Job Title. After that, use the next screen, Job Title Details, to assign Sales Role(s) to the selected Job Title.

Prerequisites

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

Steps

Select a Job Title by clicking its name.

Guidelines

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

Job Title Details

Use this screen to 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

1. Under the Role column, click the list of values box to the right of the Role field.
2. Enter a search criteria for the Role name in the pop-up box.
3. Select a Role from search results.
4. Select a Start and End Date for the term of the assignment by using the calendar pop-up box or alternatively, input the dates in the dd-mmm-yyyy format.
5. Tick the check box to indicate which Role will be the default Role assigned to this Job Title.
6. Click Restore to retrieve the last saved set of information.
7. Click Save to save new information.

User Summary

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

Prerequisites

Super User responsibility is required.

Steps

Select a User by clicking on his/her name.

User Access Details

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

Prerequisites

Super User responsibility is required.

Steps

1. Selected User may have Update or View-only access to selected Compensation Groups and Organizations.
2. Click Restore to retrieve the last saved set of information.
3. Click Save to save new information.

Setting Up Production Module

Screen List for Production Module

Access from	Topic	
Menu bar: System	System Parameters	
	Find System Profile Values	
		System Profile Values
	Security Profile	
	Find Personal Profile Names	

Access from	Topic	
		Personal Profile Values
		Oracle Sales Compensation Lookups
		Descriptive Flexfield Segments
		Segments Summary (new)
		Segments (new)
Menu bar: Financial	Set of Books	
		Closing
		Journaling
		Average Balances
		Budgetary Control
Menu bar: Financial		Multiple Reporting Currencies
		Accounting Calendar
		Period Types
		Open and Close Periods
		Currencies
		Period Rates
Financial Setups	Interval Type	
		Accumulation Period
		Pay Periods
		Credit Types
		Credit Type Conversion Factors
Menu bar: System	Tables	
		Columns
		Dimensions
		Classification
		Primary Key
		Collection
		Source Tables

Access from	Topic	
		Queries
		Mapping
		Actions
		Reporting
Revenue Classes	Revenue Class	
Hierarchies	Hierarchies	
		Details
		Import (sub hierarchy)
	Hierarchies: Dimension name	
Classification Rules	Ruleset	
	Rules	
		Rule Attribute
		Build Expression
Compensation Plans	Rate Table	
	Rate Dimension	
	Assignment	
	Formulas	
		General
		Input
		Rate Table
		Output
	Plan Element	
		General
		Revenue Class
		Formula
		Rate Tables
	Compensation Plans	
		Plan Elements

Access from	Topic	
		Salesperson Assigns
		Sales Roles
Menu bar: Tasks	Roles	
	Find Resources	
		Selection Criterion
		Resource Search Results
		Resource Details
		Create Resource
	Resource	
		Default Values
		Roles
		Groups
		Teams
		Service
		Interaction Center
		Compensation
		Receivables
		Miscellaneous
	Define Groups	
		Members
		Roles
		Usages
		Relations
		Member Details
		Move Member
		Member Roles
	Define Teams	
		Members

Access from	Topic	
		Roles
		Usages
		Member Details
		MemberRoles
	Define Sales Roles	
Pay Groups	Pay Groups	
		Pay Periods
		Salespeople
	Payment Plan	
	Salespeople Workbench	
		Salesperson (definition)
		Sales Role
		Compensation Plans
		Payment Plans
Collection	Submit Request	
Run Calculation	Calculation	
Maintain Transactions	Maintain Transactions	
		Basic
		Advanced
	Adjust or New Transaction	
		Move Credit
		Share Credit
		Deal Move
		Deal Split
		Commission Lines Screen
		Transaction History
		Customer Address

Access from	Topic	
		User Notes
Pay	Pay Worksheet	
Query	Compensation Summary	
	Compensation Detail	
	Performance Summary	
	Sales Credit	
Reports		
Payrun	Create Payrun	
	Payrun Details	
		Payment Transactions
	Payment Plans for this Salesperson	
	Payrun list by Period	

Setting System Profile Options

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

	Option	Description
1.	OSC: Collect on Account Credits Default: Yes	Enables or disables collection of "on account credits". If set to Yes, then the application will collect invoices, regular credit memos, and account credit memos when collecting invoices. If set to No, then the application will collect only invoices and regular credit memos.
2.	OSC: Commission Rate Precision Default: Null	Determines the number of digits that will automatically follow the decimal point for the commission rate.
3.	OSC: Debug Mode Default: No	Locates errors generated by concurrent processes, such as calculation, collection, transaction interface loader, and upload and download hierarchy. Setting Debug Mode to Yes writes these errors to an internal audit table.

	Option	Description
4.	OSC: Default Custom Flag Default: Yes	When set to Yes, the compensation plans are customized. Otherwise, they are not customized.
5.	OSC: Log File Default: No	If set to Yes, debugging messages are written to a log file. Only enable this profile option for debugging purposes if there are suspected problems with the application. If enabled, this profile option generates log files, which can affect performance.
6.	OSC: Log File Directory	Sets the directory where the log file is stored. When you enter the directory path, you do not need to enter a slash after the name.
7.	OSC: Mark Events	Answer No while setting up your system. Change to Yes when you are ready to start collecting transactions. Every event such as a transaction is put into the Notify Log so that it will be included in the next calculation.
8.	OSC: Prior Adjustment	Allows a period's transactions to be calculated incrementally. If set to No, allows all plan elements in a period to be calculated incrementally. Before enabling this profile option, make sure that any transactions that have a processed date earlier than the latest processed date shown in the System Parameter window have been calculated.
9.	OSC: Report Security Level	Assigns security levels to view and print reports within the company. Super User: View and print reports for all members of an organization. Analyst: View and print reports for anyone that is assigned to them. Manager: View and print reports only for the sales representatives that are below them in the hierarchy. Sales Rep @ Site: View and print only their reports.
10.	OSC: Sleep Time in Seconds	Sets the amount of wait time in between each phase of calculation. The wait time gives each phase time to complete the current process without being queried by the system for a status. The default setting is 180 seconds (3 minutes). For large volume transactions, use the default setting.
11.	OSC: User's Employee Number	Assigns a unique employee identification number to each user within the application who are managers and sale representatives. The system administrator generally assigns this number to all employees. The OSC: Report Security Level profile option uses this number to determine each user's report viewing and printing access options.
12.	OSC: User's Type	Select either Employee or Other for each user.

Implementation Steps

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

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

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

Defining the Calendar

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

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

Set of Books

Calendar

Period Types

Open and Close Periods

Key Flexfields

Select the set of books in Oracle Sales Compensation

A set of books identifies a company or fund within Oracle Applications that shares a common chart of accounts, structure, calendar, and functional currency. Oracle Sales Compensation processes sales compensation payments according to periods

defined in a calendar associated with a set of books you define in Oracle General Ledger (see Oracle General Ledger Reference).

Prerequisites

None

Steps

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

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

- Calendar associated with this set of GL books (view only, cannot be edited)
 - Period Type associated with this set of GL books (view only)
 - Currency associated with this set of books
4. Define the Collector Set of Books. You must be in the collector instance, and from the System parameters window pick the same set of books as you are using in your Oracle Receivables source.

Open and close periods in Oracle Sales Compensation

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

Oracle Sales Compensation uses period information for these functions:

- Compensation plans and plan elements
- Compensation plan assignments
- Period targets and period draws
- Hierarchies
- Salesperson rollup structure
- Adjustments to sales credits

- Account adjustments to subledger account balances
- Employment start and end dates

Steps

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

Oracle Sales Compensation displays the following period information:

- For System Status: INACTIVE (never opened) or ACTIVE (permanent status after a period has been opened)
- Name, Year, Quarter, Start Date, End Date
- Default value for Period Status is Never Opened, but it can change to:
 - Open, Closed, Permanently Closed, Future-Entry
- Status Code for salespeople for the period: unclassified (no activity or not yet recalculated after changes), classified (one or more salespeople failed the population process), populated, calculated.

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

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

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

You cannot change a Permanently Closed period.

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

Collecting Transaction data

To collect transaction data, specify:

1. The transfer batch size in the System Parameters window. A typical batch size is 2000 transactions, but that depends on your system.

2. The calculator instance, if you are using separate collector and calculator instances. Use the Calculator Database parameter in the System Parameters window.

Setting Up Collections

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

As a data collector, Oracle Sales Compensation provides the means to collect data from Oracle Receivables, Oracle Order Capture, or other data sources and to prepare that data to be transferred to the Oracle Sales Compensation calculation processes.

When the Oracle Sales Compensation calculation process receives transaction data, the data is classified according to rules created to match an organization's business model. Rules may be defined to classify transactions by product, geography, type of customer, and so on. When a transaction is classified, Oracle Sales Compensation determines whether a person should be compensated for that type of transaction. The plan elements that are the components of a compensation plan are then used to apply the appropriate formula to transactions to calculate compensation. Finally, Oracle Sales Compensation provides the information needed to update the compensation information for each salesperson.

Setting Up A New Transaction Source

The screen shot below shows the **Collections form**, which is divided into two main areas. Existing Transactions Sources are listed at the top of the form. For each Transaction Source there are three pieces of information:

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

The screenshot shows the Oracle Compensation Setup application. At the top, there is a menu bar (File, Edit, View, Folder, Tools, Window, Help) and a toolbar with various icons. Below the toolbar is a table listing Transaction Sources:

Transaction Source	Type	Status
Order Booking	OC	Complete
Receivables Posting	AR	Complete
Legacy	LEG	Incomplete

Below the table is a 'Generate' button. Underneath is a tabbed interface with five tabs: 'Source Tables' (selected), 'Queries', 'Mapping', 'Actions', and 'Reporting'. The 'Source Tables' tab contains three sections:

- Line Table:**
 - Table Name: L_ORDER_LINES
 - Key Column: LINE_ID
 - Header Identifier: HEADER_ID
- Header Table:**
 - Table Name: L_ORDER_HEADERS
 - Key Column: HEADER_ID
- Extra Direct Tables:**
 - Table Name: L_SALES_CREDITS

At the bottom of the window, there are status indicators: '<OSC>' and '<DBG>'.

The currently selected Transaction Source is Legacy, which has been set up to illustrate the example Transaction Source described earlier in this guide.

Beneath this list is a tab metaphor, an area that looks like a set of five tab dividers. It contains detailed setup information for the currently selected transaction source: Source Tables, Queries, Mapping, Actions, Reporting. Use these tabs as described here.

Source Tables

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

- A Line table is mandatory. It contains the line items against which compensation is to be paid. L_ORDER_LINES has been designated as the Line table.

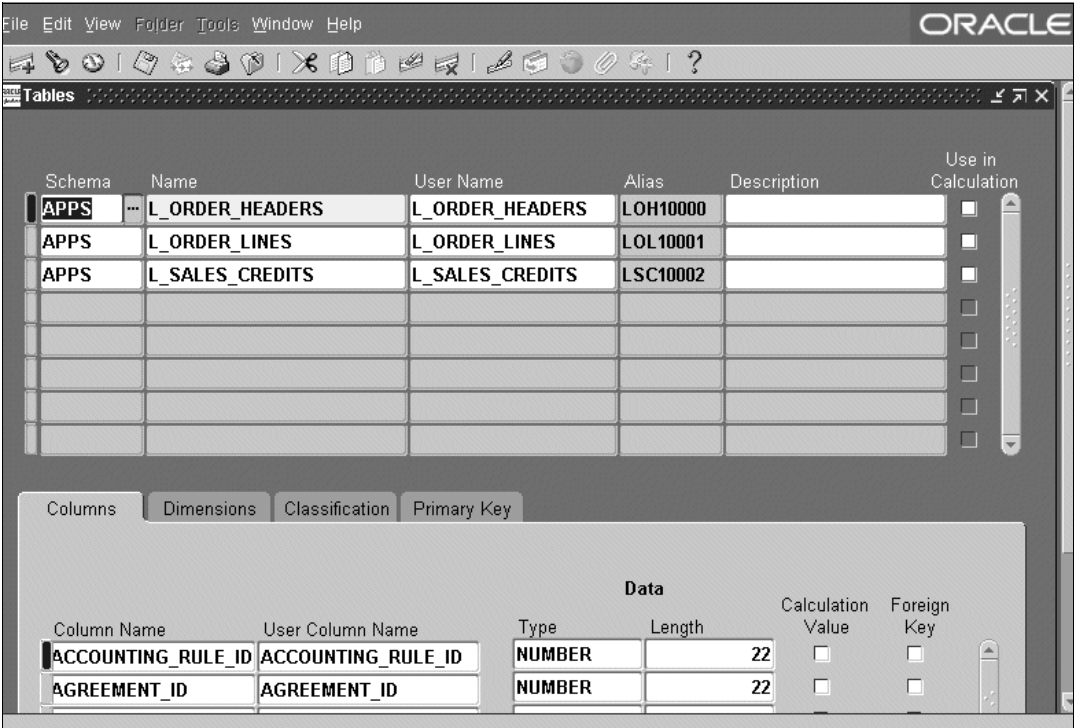
- The Key Column is mandatory: it is the field in the table that uniquely identifies each line.
- Specify any additional tables to be used in creating compensation transactions in the Extra Direct Tables List.
- Optional Header Table area, in which the L_ORDER_HEADERS table has been specified. (The reason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

Tables and Columns form: Before you can use any table, register that table using the separate Tables and Columns form (below). Note that the table *aliases* are system-defined. These are the values that you must use if you refer to a table by its alias.

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

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

1



Queries

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

The screenshot shows the Oracle Receivables Posting AR Complete window. The 'Legacy' tab is selected, showing a table with columns 'Legacy', 'LEG', and 'Incomplete'. Below this is a 'Generate' button. The 'Source Tables' tab is active, displaying two query sections: 'Notification Query and Parameters' and 'Collection Query'.

Notification Query and Parameters

FROM

```
l_order_lines lol10001,
l_order_headers loh10000
```

WHERE

```
loh10000.header_id = lol10001.header_id
AND
loh10000.booked_date BETWEEN
p_start_date AND p_end_date
```

Parameter Name Type Value

Parameter Name	Type	Value
p_start_date	VARCHAR2	
p_end_date	VARCHAR2	

Collection Query

FROM

```
l_order_lines lol10001,
l_order_headers loh10000,
l_sales_credits lsc10002,
```

WHERE

```
lol10001.line_id = cnt.source_trx_line_id
AND loh10000.header_id = cnt.
source_trx_id
AND
lsc10002.line_id = lol10001.line_id
```

Notification Query

Look at the Notification Query and Parameters section. This shows the exact query that is used to create the Notification list of line-level transactions which are eligible for compensation. The FROM clause and the initial part of the WHERE clause are automatically filled according to the information entered on Source Tables tab. The query joins together the mandatory Line table (L_ORDER_LINES) and the optional Header table (L_ORDER_HEADERS). It is necessary to specify a header table, even though the purpose of Notification is to get a list of identifiers from the Line table. The reason for this lies in the additional criterion which has been added to the end of the WHERE clause:

```
AND loh10000.booked_date BETWEEN p_start_date AND p_end_date
```

This restriction means that the user wants to collect only the orders that were booked between a specific start and end dates. The booked date of the order resides in the Order Header, so it is necessary to bring the L_ORDER_HEADERS table into the Notification Query to allow this. This requirement often applies, so the Header

Table field on the Source Tables is provided to enable this match without the need for advanced SQL knowledge.

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

Collection Query

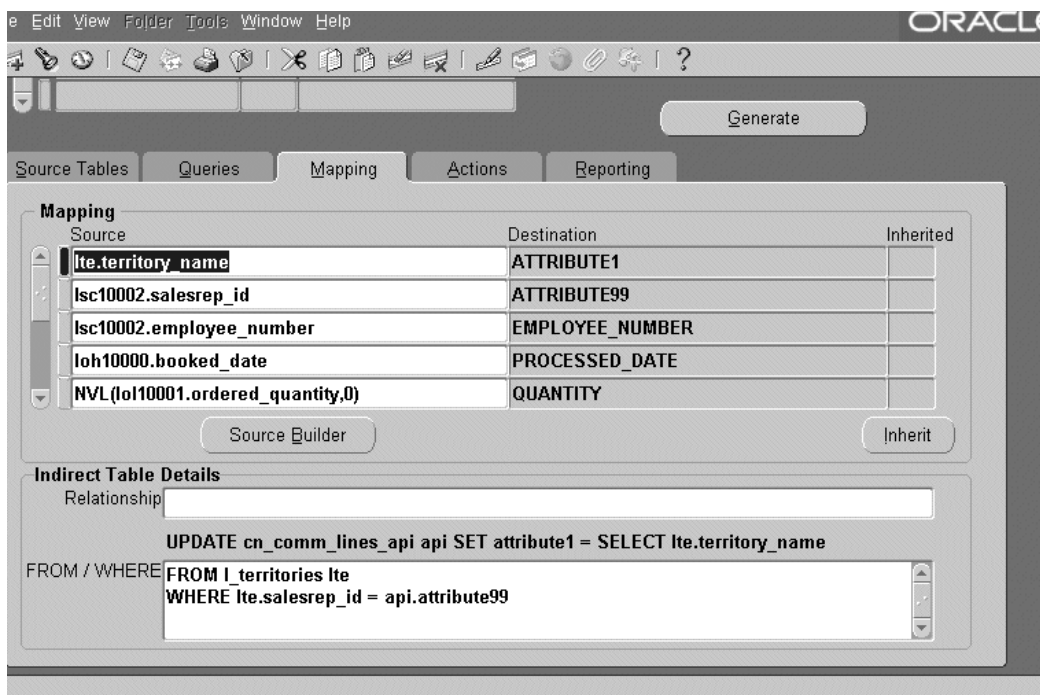
The list of tables in the Collection query FROM clause (the **Direct Mapping** Tables) consists of the Line table, the (optional) Header table and all of the tables listed as Extra Direct Tables on the Source tables tab.

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

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

Mapping

Use the Mapping tab to specify what data is needed to fill each destination column when a compensation record is collected from the Transaction Source. The mapping tab is shown in the screen shot below.



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

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

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

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

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

Direct Mappings

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

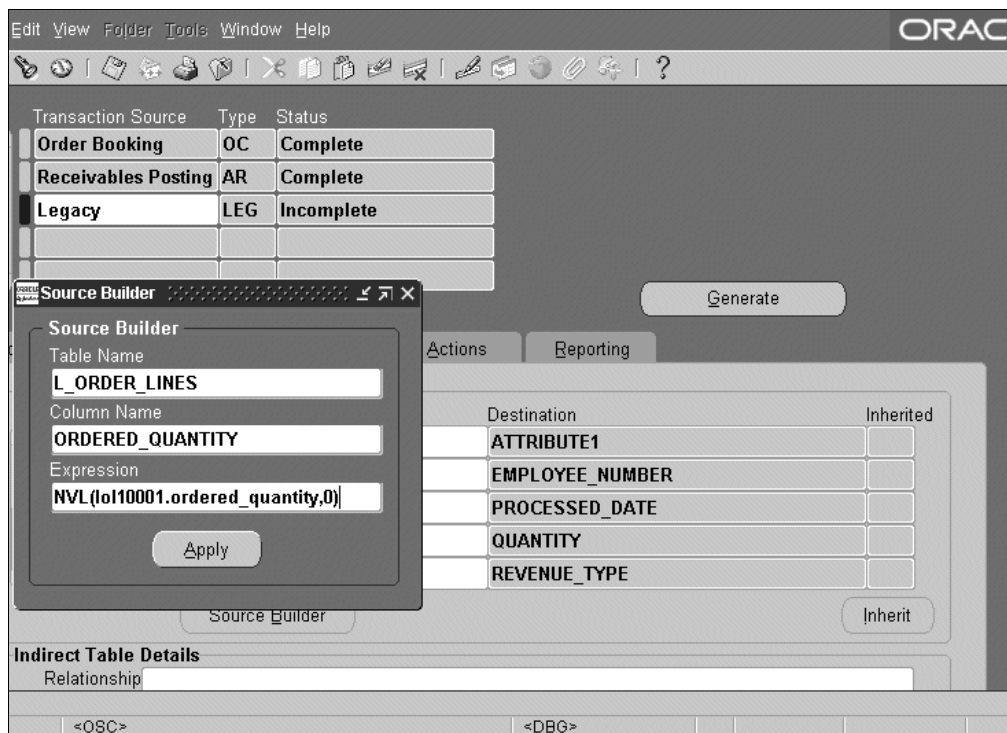
If the Source data does not include any database information at all--if it is just NULL or a literal value --then this can also be regarded as a Direct Mapping.

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

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

Although you can type this text directly into the Source field, this approach is potentially error-prone. You need to spell the column name (*ordered_quantity*) correctly and you should normally precede that with either the full name of the

source table (*L_order_lines*) or the exact alias of the table (*lol10001*). Instead of this manual procedure, you can press the Source Builder button to get a List Of Values (LOV) to help you. This is presented in a dialog box as shown below.



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

1. Type **NVL(** in the Expression field.
2. Click the Table Name LOV. The names of the Direct Tables are listed.
3. Select **L_ORDER_LINES**.
4. Click the Table Name LOV. The names of the L_ORDER_LINES columns are listed.
5. Select **ORDERED_QUANTITY**
6. The text `lsc.amount` is appended to the expression field
7. Type **, 0)** at the end of the Expression field

8. Click Apply. The dialog disappears and the full expression is now pasted into the Source field.

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

Indirect Mappings

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

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

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

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

1. Create a new record in the mappings list.
2. Enter **lsc.salesrep_id** in the Source Field.
3. In the Destination field select a spare column, like Attribute99, from the LOV DO NOT use the Salesrep_ID destination column: the reason why is explained later in *Mapping the Employee Number*.

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

1. Create a new record in the mappings list.
2. Enter **FROM l_territories lte WHERE lte.salesrep_id = api.attribute99** in the FROM/WHERE field.
3. Enter **lte.territory_name** in the Source field. Note that if you use Source Builder to do this, the Table Name LOV will list all of the tables that are currently

registered (in Tables & Columns) in Oracle Sales Compensation. This is because the FROM clause is free-form text which could contain multiple tables. It is easier to list all the tables for the user to choose from than to try to extract table names out of the FROM/WHERE clause.

4. In the Destination field select Attribute1 from the LOV.

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

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

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

```
UPDATE cn_comm_lines_api api SET attribute1 = SELECT lte.territory_name
```

The FROM/WHERE field completes the statement:

```
FROM l_territories lte WHERE lte.salesrep_id = api.attribute99
```

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

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

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

```
WHERE table1.columnA = table2.columnB
```

AND table1.columnC = table2.columnD

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

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

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

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

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

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

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

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

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

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

Actions

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

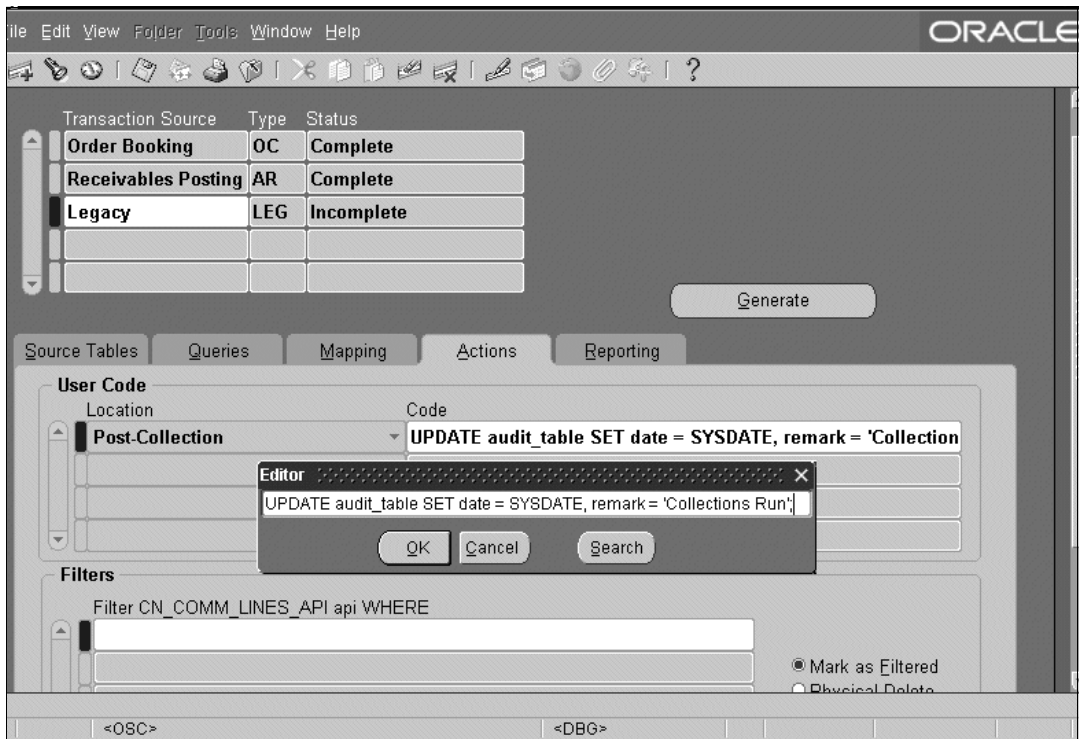
User Code Blocks are single or multiple PL/SQL statements which you can choose to have inserted at defined points within the Collect procedure that will be generated for your Transaction Source. You can insert User Code Block at three locations:

Pre-Notification: the beginning of the procedure

Post-Notification: between running the Notification and Collection queries

Post-Collection: after the Collection query has been run

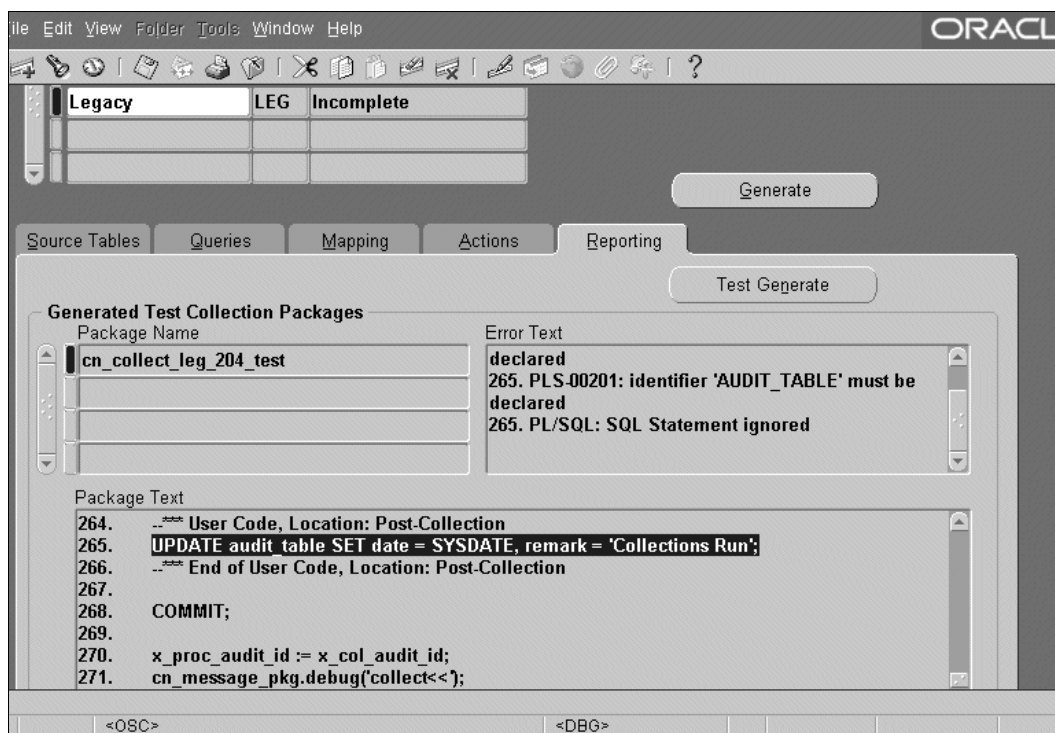
To create a User Code Block, choose the required Location from the selection list and then type your statement(s) in the Code field.



Reporting

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

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



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

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

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

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

Running Collections

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

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

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

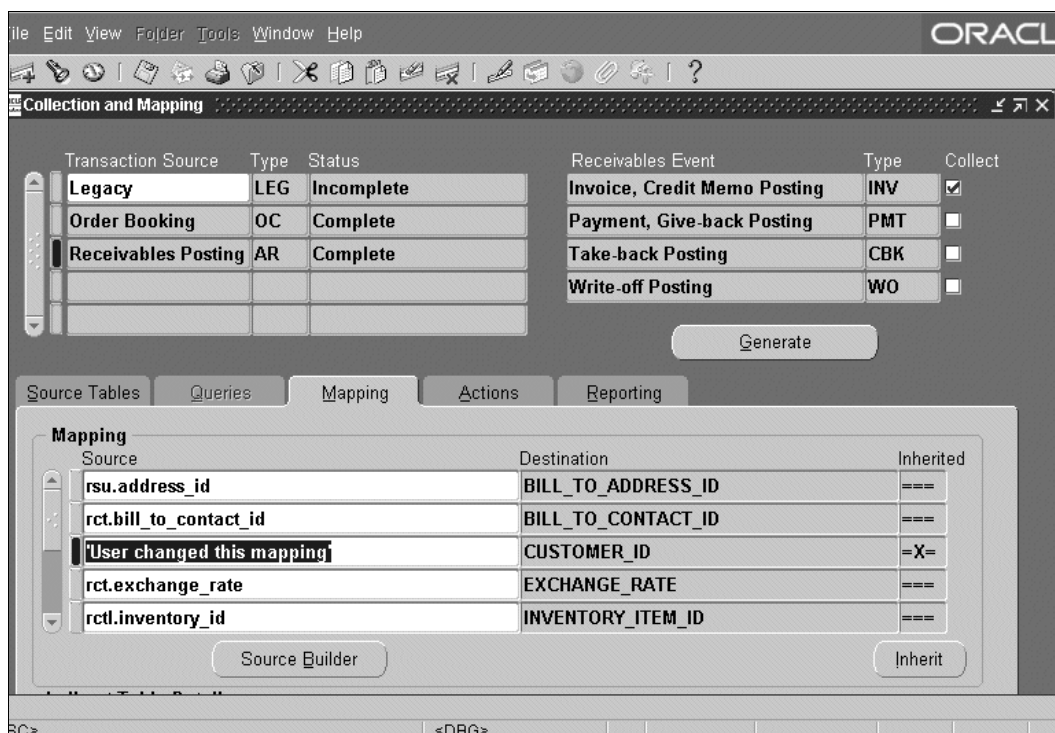
The final action required to pull these transactions from the API table into Oracle Sales Compensation is to run the Transaction Interface Loader concurrent program, or to press the Load Transactions button on the Maintain Transactions form.

Setting Up A Standard Transaction Source

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

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

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



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

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

Using Filters

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

The screenshot shows the Oracle Sales Compensation interface. At the top, there is a menu bar with 'Edit', 'View', 'Folder', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main window is divided into several sections. On the left, there is a table with columns for 'Order Booking', 'OC', and 'Complete'. The first row shows 'Order Booking' with value 'OC' and 'Complete'. The second row shows 'Receivables Posting' with value 'AR' and 'Complete'. Below this table is a 'Generate' button. To the right of the table, there is another table with columns for 'Payment, Give-back Posting', 'PMT', 'Take-back Posting', 'CBK', and 'Write-off Posting', 'WO'. Below this table is a 'Generate' button. The main section of the interface is titled 'User Code' and contains a 'Location' dropdown menu and a 'Code' text input field. Below this is a 'Filters' section. The 'Filters' section contains a text input field with the filter expression 'api.transaction_amount < 100'. To the right of the filter input field are two radio buttons: 'Mark as Filtered' (selected) and 'Physical Delete'. Below the radio buttons is a 'Clause Builder' button. At the bottom of the interface is a status bar with '<DBG>' and other icons.

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

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

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

Receivables and Order Capture Special Features

Oracle Receivables

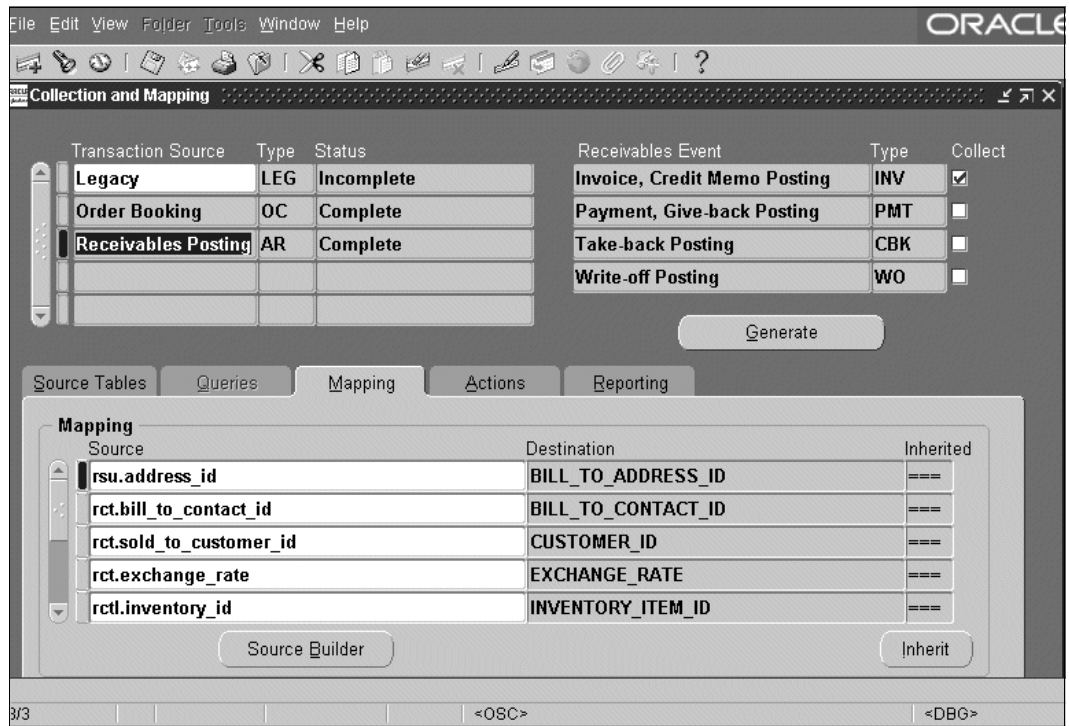
The pre-defined Receivables data source differs slightly from any other data source because it really represents four Transaction Sources which have been combined into one, so that they can share a set of Mappings. The four sources are referred to as Receivables Events and are as follows:

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

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

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

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



Use this table to select Events. In the screen shot above, the user has selected only the Invoice (plus Credit/Debit memo) Event. When the Generate button is pressed the full package will be generated for the collection of Invoices, Credit Memos, and Debit Memos. For the other three Events (Write-offs, for example) simple stub packages will be generated. This speeds up the Generation process.

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

- Collect Invoices
- Collect Clawbacks
- Collect Payments And Givebacks
- Collect Writeoffs

Oracle Order Capture

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

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

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

Adjustments

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

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

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

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

Each time Collect Orders is run, the list of unprocessed updated Order Lines must first be processed. This can take rather a long time. To avoid having a long wait

when running Collect Orders, it is a good idea to process this list of updated Order Lines at regular intervals (perhaps daily). There is a Concurrent Program to do this, *Order Update Notification*.

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

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

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

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

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

CN_NOTIFICATION_PUB.Create_Notification

(p_api_version	=>	1.0,	
x_return_status	=>	l_return_status,	-- OUT parameter
x_msg_count	=>	l_msg_count,	-- OUT parameter
x_msg_data	=>	l_msg_data,	-- OUT parameter
p_line_id	=>	1234,	-- Line Table Id
p_source_doc_type	=>	'LEG',	-- Transaction Source Type

p_adjusted_flag	=>	'Y',	-- Adjustment(not new record)
p_header_id	=>	1001,	-- Header Table Identifier
p_org_id	=>	your_org_id,	-- Operating Unit (optional)
x_loading_status	=>	l_loading_status	-- OUT parameter
);			

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

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

Setting up Classification

Creating Revenue Classes and Hierarchies

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

Categorizing Your Sales Revenue

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

What Is a Revenue Class?

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

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

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

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

Defining a Revenue Class

A **revenue class** is a user-defined category of sales for which your organization awards compensation. Many organizations award compensation based on the types

of products and services they sell. In that case, the products and services are grouped into revenue classes and arranged into hierarchies with broader categories at the top, or root, of the hierarchy.

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

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

Use this screen to create Revenue Classes.

Prerequisites

Liability and Expense Accounts have been determined.

Steps

1. In the Navigator, choose **Classification Rules > View By Revenue Classes**.
2. In the hierarchy, right-click **Revenue Classes** and choose **New**.
The Revenue Class window appears.
3. Enter the names and descriptions for all revenue classes you have identified.
4. Select a Liability Account and Expense Account, if applicable.
5. Save your work by clicking **File** in the toolbar and **Save** in the drop down menu.

Hierarchy

Use this screen to assemble Revenue Classes into hierarchies.

Prerequisites

Revenue Classes have been created.

Steps

1. In the hierarchy, double-click **Revenue Classes**.
The Hierarchies window displays the revenue class hierarchy type.

2. Enter a name for your hierarchy.
3. Enter the start and end dates for the hierarchy.
4. Save your hierarchy.
5. Click **View Details**.

The Hierarchies window displays the existing available root classes. The application provides a default root class called Base Node.

6. Enter one or more root class names.

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

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

The Hierarchy Elements window displays the existing children for the selected revenue class.

9. Use the list of values to add a revenue class.
10. Click **OK**.

The added revenue class appears in the hierarchy.

11. Repeat from step 11 to build your hierarchy.
12. Save your work periodically and again before you exit the window.

Guidelines

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

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

Creating Classification Rules

A classification ruleset is used to classify sales transactions to determine the appropriate revenue class for the transaction. Using the revenue class, a transaction is matched with a compensation plan and a compensation amount to be paid for the

transaction is calculated. Use this procedure to define a set of attributes and values that uniquely identify each revenue classification.

Guidelines

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

Tables

Use this screen to define the descriptive flexfields in CN_COMMISSION_HEADERS table.

Prerequisites

Super User responsibility is required.

Steps

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

Guidelines

If Oracle Sales Online is used, forecast Compensation in Oracle Sales Online will be enabled by calculating Compensation by opportunity. You can forecast compensation in the Oracle Sales products with greater accuracy by calculating compensation by opportunity. In order to do so, assign attributes in the CN_COMMISSION_LINES table to Interest Type, Primary Interest, and Secondary Interest in Tables and Columns, select Classification Value, and create classification rules that use one or more of these attributes.

Ruleset

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

Prerequisites

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

Steps

1. In the Navigator, choose **Classification Rules > View By Classification Rules**.
2. In the hierarchy, right-click **Classification Rules** and choose **New**.
The Ruleset window appears.
3. Specify a name for your set of classification rules and assign active start and end dates.
4. Select Revenue Classification type.
5. Save the ruleset.
The new ruleset appears in the Navigator.
6. Close the Form and return to the Navigator.
7. Right-click the ruleset that you have just created and select **Add new child Rule**.
The Rules Form will appear.
8. Define your classification rules on the Rules Form and return to this Form when completed.
9. For every Ruleset that has new or changed rules, click **Synchronize**.
Ruleset Status displays either **Complete** if the currently defined revenue classes and rules have been synchronized, or **Incomplete** if you have made changes in your definitions since they were last synchronized.
When you click **Synchronize**, the classification rules package is automatically installed in the database using the concurrent program named **Install Classification Rules Package**.

Guidelines

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

A hierarchy of rules can be defined for each ruleset.

Every rule must have at least one attribute.

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

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

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

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

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

Troubleshooting

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

Rules

Use this screen to define the classification rules.

Prerequisites

Classification Ruleset has been created.

Steps

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

The Rules window appears.

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

Every attribute is assumed to be linked to other attributes with **AND**.

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

An additional value of **Result1** appears in the first column and is added to the attribute list of values.

7. Continue to relate the remaining attributes. Use **Result1** to relate a third attribute to the first two.
8. Save the rule.

The expression appears.

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

Guidelines

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

Defining Other Dimensions

Steps

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

By default, choose Dimensions from the Setup menu to open the Dimensions window.
2. Define the dimension table in the Oracle Sales Compensation using the Tables and Columns form (Setup> Tables and Columns). Enter the table name and column names. The dimension table must have a Primary Key and a column that stores the actual dimension values.
3. Open the Dimensions window again.
4. In the Name field, enter the name of the new dimension.
5. In the Base Table field, enter the name of the table for the new dimension or select the table name from a list of values. (If a table has a dimension based on it already, it will not appear in the list of values for this field.)
6. In the Primary Key field, enter the name of the column defined as the Primary Key in this table (as defined in the Tables and Columns form).
7. In the Dimension Values field, enter the name of the column that stores the values that will appear in the hierarchies.
8. Define one or more hierarchies for this dimension and save your work.

Defining a Hierarchy

Steps

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

The Hierarchies window displays the revenue class hierarchy type.
2. In the Name field, select the dimension for which you are defining a hierarchy.
3. Choose Hierarchies. Use the Hierarchies window that opens to add and view hierarchies.
4. Enter the name of the new hierarchy.

5. Enter the period you want the hierarchy to be effective. Choose From and To periods from a list of values. Two hierarchies in the same dimension cannot have overlapping periods.
6. Add nodes to a hierarchy. Save your work.

Adding Nodes to a Hierarchy

Steps

1. In the hierarchy, double-click **Revenue Classes**.
The Hierarchies window displays the revenue class hierarchy type.
2. Select a hierarchy, then choose Nodes.
Use the window that opens to define the parent-child relationship between all nodes in a hierarchy.
3. Start at the top of the hierarchy; define the nodes in your hierarchy.
By default, Oracle Sales Compensation names the highest level root of every hierarchy BASE NODE. You can change this name. Use the Current Root menu to change the root you are defining.
4. Enter the names of all children of this node. Use the list of values to select the children.
5. To define the next level in the hierarchy, select a child node, then choose Children.
The 'child' moves to the Current Node position and Oracle Sales Compensation displays the children of the new parent, if they exist.
6. Enter the names of all children of this parent.
7. Choose Parent to go one level up in the hierarchy.
8. Repeat steps 4 through 7 to define all nodes in the hierarchy.
9. Save your work and exit the window.

Deleting Nodes from a Hierarchy

Steps

1. In the Hierarchies window, choose Nodes.

2. Select the node you want to delete and then choose Delete Record from the Edit menu.
3. Save your work and exit the window.

Setting Up Compensation Plans

Defining Calculation

You can use approximately 165 columns when defining a Calculation expression. There are 100 user definable column attributes and approximately 65 hard coded columns. You can use these Calculation Expressions as Performance Measures, Input Expressions or Output Expressions. You can also nest a Calculation Expression within another Calculation Expression.

As part of the definition process you can select the corresponding columns from the expression builder and create expressions. Once they have been saved they can be assigned and reassigned to any number of formulae you need.

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

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

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

`TRANSACTION_AMOUNT* EVENT_FACTOR`

Inputs of the Formula instruct Sales Compensation what to evaluate from the transactions and how to match the results to the corresponding rate table. Think of the input expression as a sorter for all incoming transactions for Sales Compensation.

A sample rate table could look like:

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

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

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

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

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

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

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

Example of an output expression:

Rate Table Result * (TRANSACTION_AMOUNT * EVENT_FACTOR * PAYMENT_FACTOR)

Using the above expressions, Oracle Sales Compensation will match what the input expression returns as the corresponding rate table result (that is, matching the \$100 transaction amount and coming up with a pay out of 4%), multiply it by the transaction amount (\$100), multiply with event factor of 100% and multiply with 1.035 for the payment accelerator or payment uplift.

Total payment due to the salesperson for this transaction will be \$4.14.

Forming Calculation Expressions

Use this screen to define calculation expressions or parts of your formula that you can re-use in other formulas.

Prerequisites

None

Steps

1. Choose **System** from the **Menu bar**, and select **Tables and Columns** from the **drop down menu**.

2. Query the Schema and Table name that you want to view.

For example, if you want to view the CN_COMMISSION_HEADERS, query on **Schema** CN and **Name** CN_COMMISSION_HEADERS.

The **Tables and Columns** window displays the selected schema and table.

3. Next to the table, select **Use in Calculation**.

The columns in the table are listed.

4. Optionally, give each column a business-related user column name for ease of identification by the user.
5. Select **Calculation Value** for each column to be made available for inclusion in a calculation.
6. Save your work.

External tables can also be used. Create a Table in any schema in the same instance as the application.

7. In the Menu bar, choose **System > External Table**.
8. Register the table by choosing the desired table and saving it.
9. Click the **Columns** tab.
10. Click the **Primary Key** tab and check the primary key box.
11. Enter sequence in sequence field.
12. In the Menu bar, choose **System > External Table**.

13. Enter source table and destination table.

Guidelines

A Commission Formula must include at least one column from the following tables.

- `cn_commission_lines`
- `cn_commission_headers`

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

- `cn_commission_lines`
- `cn_commission_headers`
- `cn_srp_period_quotas`

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

A Bonus Formula cannot include an element from the table `cn_srp_period_quotas` or any table that is mapped to this table.

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

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

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

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

- CN_COMMISSION_HEADERS
- CN_COMMISSION_LINES
- CN_SRP_QUOTA_ASSIGNS
- CN_SRP_PERIOD_QUOTAS
- CN_SRP_PERIODS
- CN_QUOTAS

Defining Rate Tables

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

Prerequisites

Rate Dimensions must exist.

Steps

1. In the Navigator, choose **Compensation Plans** > View By **Rate Tables**.
2. In the hierarchy, right-click **Rate Tables** and choose **New**.
The Rate Tables window appears.
3. Enter a unique name for the Rate Table. Select a Rate Table type, either an Amount type or a Percentage type.
4. In the next block select a rate Dimension that you created previously.
5. In the remaining blocks, select each Dimension and enter either your commission Amounts or your commission Percentages.
6. Save your Rate Table.

Rate Dimensions

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

For example, you are giving an added sales incentive for selling products A and B in addition to variable commission rates based on revenue. Your formula first compares revenue against a dimension of commission percentages. This dimension must be dimension 1. Next your formula compares sold volume of product A with a fixed fee dimension based on volume. This dimension must be dimension 2. Product B needs a separate dimension to compare with sales volume, which is dimension 3.

A dimension contains rate tiers to establish different levels of achievement to be compensated at different rates. See the following table for an example of a dimension with rate tiers.

Dimension**Revenue**

0 - 10,000

10,000 - 25,000

25,000 - 50,000

50,000 -

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

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

In the following example there are three dimensions containing three tiers each. A total of 27 rates needs to be defined. In the following table the steps required to define the 27 rates are shown. Dimension 3 is chosen as the primary dimension. At step 2 a different tier is chosen for dimension 2 and related rates in dimension 3 are entered.

Dimension and Rates Example

Dimension 1	Dimension 2	Dimension 3	Rate
Dimensions			
1-2	10-20	100-200	
2-3	20-30	200-300	
3-4	30-40	300-400	
Step 1			
1-2	10-20	100-200	1
		200-300	2
		300-400	3
Step 2			

Dimension and Rates Example

Dimension 1	Dimension 2	Dimension 3	Rate
1-2	20-30	100-200	4
		200-300	5
		300-400	6
Step 3			
1-2	30-40	100-200	7
		200-300	8
		300-400	9
Step 4			
2-3	10-20	100-200	10
		200-300	11
		300-400	12
Step 5			
2-3	20-30	100-200	13
		200-300	14
		300-400	15
Step 6			
2-3	30-40	100-200	16
		200-300	17
		300-400	18
Step 7			
3-4	10-20	100-200	19
		200-300	20
		300-400	21
Step 8			
3-4	20-30	100-200	22
		200-300	23
		300-400	24

Dimension and Rates Example

Dimension 1	Dimension 2	Dimension 3	Rate
<i>Step 9</i>			
3-4	30-40	100-200	25
		200-300	26
		300-400	27

Prerequisites

None

Steps

1. In the Menu bar, select **Tasks > Rate Dimensions**.
2. Assign a unique name to your Dimension.
3. Select either Amount or Percentage type. The type chosen determines how you express your achievement levels.
4. Enter its description.
5. In the next block, enter the amounts or the percentages in ascending order.
6. The Tier Sequence will be numbered automatically as you progress through each level of achievement.

Creating Formulas

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

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

Prerequisites

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

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

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

Steps

1. In the **Navigator**, choose **Compensation Plans** > View by **Formula**.
2. In the hierarchy, right-click **Formulas** and choose New.
3. In the general tab, enter a unique name and a description for your Formula.
4. Decide whether your Formula is for calculating a Commission or a Bonus. Make your selection at Type.
5. In the next block, determine your calculation rules.
6. In the last block, select a **Calculation Expression** that will become your Performance Measure. Performance Measure as well as Quota will be used in Reports for comparison with achievement.
7. In the Input tab, select a **Calculation Expression** to represent your input formula. The number of Input Calculation Expressions must equal the number of Dimensions in the Rate Table that you will select in the next step.
8. If applied rates are part of your formula, then in the **Rate Table** tab, select the rate tables to apply to the formula and enter their effective start and end dates. You can view the Rate Table details and rates for each dimension by clicking on the Rate Table Details button.
9. In the **Output** tab, select your output Calculation Expression.
10. Return to the General tab and click Generate. On completion, the validation process will return a Complete status.

Guidelines

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

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.

Tick the Accumulative checkbox if transactions are required to be aggregated in total. 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

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

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

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

Defining Plan Elements

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

Prerequisites

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

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

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

Steps

1. In the Navigator, choose **Compensation Plans > View By Plan Elements**.
2. Right-click on Plan Elements and select new.
3. In the General tab, in the first block:
 - Enter a unique name for your Plan Element.
 - Enter its Start and End dates.
 - Enter a description of its objective.
 - You may copy from an existing Plan Element by clicking on the Copy Plan Element button to make a duplicate of the displayed Plan Element. The name is changed with a “_2” attached to the end of the Plan Element name. You may over-write with a new name if you wish, before saving the new Plan Element.
 - To start a new Plan Element, click on the New Plan Element button.
 - In the Quota Group field, select either Quota or Bonus. If you select Quota, this Plan Element will appear in the top half of the YTD Summary Report. If you select Bonus, then this Plan Element will appear in the lower half of the YTD Summary Report.
4. In the second block of the General tab:
 - Select the Interval, Incentive type, Credit type, Formula type and a Formula. If you choose External Formula type, you must enter the name of the PL/SQL procedure. If you choose Formula type, select a Formula that has a Complete status.
 - If you want the Plan Element and the eventual payment to be assigned to someone other than the Salesperson credited with the sale, tick the Eligible for Payee Assignment checkbox.
 - Tick the Calculate Last checkbox if you want this Plan Element to be calculated after all the other Plan Elements assigned to the same Compensation Plan as this Plan Element is, are calculated.
 - Select Liability and Expense Account codes information that you want sent to Oracle Accounts Payable Invoice Interface Table for all future commission payments relating to this Plan Element.

5. In the last block of the General tab, enter the Quota, Fixed Amount, and Goal figures. These are measures that will be used to compare against actual achievements. If you have Quota, Fixed Amount and Goal figures against individual Revenue Classes assigned to this Plan Element, you can tick the Sum amounts from Revenue Classes checkbox and the totals will appear in these 3 fields. The Distribute Variables button will be available once a Formula with Interval to Date checked is assigned to your Plan Element. The Distribute function allows you to seasonalize your Quota, Fixed Amount and Goals.
6. In the Revenue Classes tab, assign your Revenue Classes to this Plan Element. You may have Quota and Payment Accelerators at Revenue Class level for an effective period that you can specify through the Start and End Dates. Ensure that your Transaction or Event factors add up to 100% in total. Example, you can have 50% of the Order value calculated for commission, 20% of the Invoice value and 30% of the Payment amount for commission calculation. Other Factors do not need to total 100% and each can be over 100% if you require.
7. The Formula tab will display the Formula that you have assigned under the General tab earlier.
8. Similarly, the Rate Table tab will display the rates associated with the Formula.
9. Save your new Plan Element so that it will be available for assigning to a Compensation Plan.

Guidelines

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

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

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

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

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

How the Accelerators and transaction factors are used will depend on how your Calculation Expression is defined. Example, a common Formula is to have an Input Expression =

TRANSACTION_AMOUNT* EVENT_FACTOR* QUOTA_FACTOR;

and an Output Expression =

Rate_Result* TRANSACTION_AMOUNT* EVENT_FACTOR* PAYMENT_FACTOR.

You will find both Accelerators and the Transaction factors/Event factors under Oracle Sales Compensation Elements.

Defining Compensation Plans

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

Use this procedure to define a compensation plan.

Prerequisites

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

Steps

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

The Plan Element window displays the selected plan element information.

9. Click **Validate** to ensure that you have entered the plan information correctly.

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

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

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

10. Save the plan.

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

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

Guidelines

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

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

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

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

Customizing Compensation Plans

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

Prerequisites

None

Steps

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

The compensation plans and plan elements for the salesperson and sales role appear.

3. Select **Customized** next to the plan element to be customized.

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

4. Select the plan element name and click **Details**.

The Plan Element window displays the details for the plan element.

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

Guidelines

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

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

Setting Up Payment

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

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

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

Defining Pay Groups

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

Prerequisites

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

Steps

1. In the Navigator, choose **Payment Setup > View By Pay Groups**.
2. In the hierarchy, right-click **Pay Groups** and choose **New**.
The Pay Groups window appears.
3. Assign a unique name to the pay group and enter a description.
4. Select effective start and end dates for the pay group.

5. Select a calendar from the list of values.
6. Select a period type from the list of period types that were defined for the selected calendar.

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

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

7. Save the pay group.

Guidelines

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

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

Defining Payment Plans

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

Prerequisites

Credit types must be defined.

Steps

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

The Payment Plan window appears.

3. Assign a unique name to the payment plan.
4. Optionally, establish a minimum amount to be paid at the end of each pay interval, and whether or not it is recoverable from later commissions.
5. Optionally, establish a maximum amount to be paid at the end of each pay interval.
6. Optionally, establish a maximum amount that can be recovered in each pay interval.

7. If you want any commission earned above the maximum payment to be included in a later pay run, then select **Pay Later**.

8. Save the payment plan.

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

Guidelines

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

Account Generator

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

- REVENUE CLASS
- PLAN ELEMENT
- TRANSACTION

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

Define a Ruleset of the type 'Liability Account Mapping'. Define rules for this Ruleset by selecting the columns of transaction that determine the segments and thus the code combination id that forms its rule attributes. The classification package will be generated and the appropriate package will be invoked by the payment submission package that obtains the liability code dynamically based on the liability account mapping setup.

Sample Summary Reports

See sample Summary Reports in the Appendix to this Guide.

OSC Summary Reports

Performance

1. Compensation Summary
2. Blind Ranking Report
3. Top/Bottom Performers Report
4. Compensation Details
5. Sales Credit Reports
6. Performance Details Report
7. Compensation Details (Fiscal View)
8. Performance Details (Fiscal View)
9. Compensation Trending Report

Operational

1. Adjustments Report
2. Compensation Group Hierarchy Report
3. Salespeople Hierarchy Report
4. Analyst Compensation Consolidated Summary
5. Payrun Listing
6. Payee Report
7. Classification Rules Report
8. Payrun Details

Exception

Payment Hold Report
Pending Payment Report
Pending Transactions Report

Adjustment Report

This report indicates adjustments and status for compensation.

Some fields are user definable and some can be queried. Enter your information for the basic parameters. Follow the example below, which illustrates the requirements for basic parameter setup.

You can select attribute1- 6 columns from the base table and display values for these columns as output to this report. You can enter messages that will appear at the bottom of a report.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names and the extra choice 'All'. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	All	Y	NAME
Salesperson Number	LOV - All the salespersons' numbers and the extra choice 'All'. Once a value is selected in the salesperson number field the salesperson name should be automatically populated also.	All	Y	EMPLOYEE_NUMBER
Process Date From	No LOV - The calendar feature should be used.		N	CALANDER WIDGET
Process Date To	No LOV - The calendar feature should be used. This parameter can hold a date no earlier than that entered in the process date from parameter field. You still need to be able to enter a date in this parameter if the Process Date from parameter is null.		N	CALANDER WIDGET
Invoice Number	LOV - All the invoice numbers and the extra choice 'All'. This LOV should be restricted if an individual salesperson is chosen to only those invoices applicable to that salesperson. If the process date parameters are used this parameters LOV should be restricted further to only the applicable invoice numbers. If the order number parameter has been entered this LOV should be restricted further to valid corresponding invoice numbers.	All	Y	INVOICE_NUMBER
Order Number	LOV - All the order numbers and the extra choice 'All'. This LOV should be restricted if an individual salesperson is chosen to only	All	Y	ORDER_NUMBER

	those orders applicable to that salesperson. If the process date parameters are used this parameters LOV should be restricted further to only the applicable order numbers.			
Calculation Status	LOV - All the calculation statuses and the extra choice 'All'.	All	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'TRX_STATUS'
Adjustment Status	LOV- All the adjustment statuses and the extra choice 'All'	All	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'ADJUST_STATUS'
Adjustment Date	No LOV - The calendar feature should be used.		N	CALENDER WIDGET

Data

Column Descriptions

The following table describes each column to be included in the Adjustments Report.

Column Title	Description	Value Length	Column Name/Formula
Salesperson Name	The salespersons name for the required adjustment.	40	DIRECT_SALESREP_ID
Salesperson Number	The salespersons number for the required adjustment.	30	DIRECT_SALESREP_NUMBER
Process Date	The adjustment process date.	11	PROCESSED_DATE
Transaction Type	The adjustment transaction type	20	TRX_TYPE
Order Number	The adjustment order number	15	ORDER_NUMBER
Order Date	The adjustment order date	11	ORDER_DATE
Invoice Number	The adjustment invoice number	15	INVOICE_NUMBER
Invoice Date	The adjustment invoice date	11	INVOICE_DATE
Currency Code	The adjustment currency code	20	CURRENCY_CODE
Adjustment Status	The adjustment status	30	ADJUST_STATUS
Calculation Status	The adjustment calculation status	30	STATUS
Transaction Amount	The adjustment transaction amount	20	TRANSACTION_AMOUNT_ORIG
Commission Amount	The adjustment commission amount.	20	COMMISSION_AMOUNT

Adjustments Report



Parameters

Salesperson Name	<input type="text" value="All"/>	Invoice Number	<input type="text" value="All"/>	Adjustment Date	<input type="text" value="17-Jun-1999"/>
Salesperson Number	<input type="text" value="All"/>	Order Number	<input type="text" value="All"/>	Analyst Group	<input type="text" value="All"/>
Process Date From	<input type="text" value="15-Jun-1999"/>	Calculation Status	<input type="text" value="Calculated"/>		
Process Date To	<input type="text"/>	Adjustment Status	<input type="text" value="Frozen"/>		

Run Report

Print

Save to Favorites

Salesperson Name	Salesperson Number	Process Date	Transaction Type	Order Number	Order Date	Invoice Number	Invoice Date	Currency Code	Adjustment Status	Calculation Status	Transaction Amount	Commission Amount
Bob Wiley	11	15-Jun-1999	Manual Transaction	5721141	15-Jun-1999	254457	16-Jun-1999	USD	Frozen	Calculated	75,000	7,500
Barry Lewis	44	15-Jun-1999	Manual Transaction	5781154	15-Jun-1999	278615	16-Jun-1999	USD	Frozen	Calculated	15,000	1,500
Delores Smith-Jones	45	15-Jun-1999	Manual Transaction	5211247	15-Jun-1999	236974	16-Jun-1999	USD	Frozen	Calculated	25,000	2,500
Elaine Manley	46	15-Jun-1999	Manual Transaction	5247999	15-Jun-1999	236799	16-Jun-1999	USD	Frozen	Calculated	78,520	7,852
Howard Sprague	47	15-Jun-1999	Manual Transaction	7551121	15-Jun-1999	235449	16-Jun-1999	USD	Frozen	Calculated	45,000	4,500
Jerrold Feinberg	48	15-Jun-1999	Manual Transaction	6842154	15-Jun-1999	254779	16-Jun-1999	USD	Frozen	Calculated	150,000	15,000
Lisa Douglas	49	15-Jun-1999	Manual Transaction	5219547	15-Jun-1999	221487	16-Jun-1999	USD	Frozen	Calculated	45,000	4,500
Pat Murphy	50	15-Jun-1999	Manual Transaction	9644842	15-Jun-1999	214577	16-Jun-1999	USD	Frozen	Calculated	3,000	300

Related Information:

[Customize](#)

Consolidated Compensation Summary Report

This is the key report for compensation analysts. It shows all sales credits that make up the commission/bonus amounts. The salesperson name figures link to the Compensation Summary Report. Total gross pay figures link to the Payrun Detail Report. Total Pending figures link to the Pending Transaction Report.

Enter your information for the basic parameters. The example below illustrates the requirements for basic parameter setup.

Figures displayed in this report are in the salesperson's functional currency. You can export the information for some fields by using the 'export to excel function'.

You can enter messages that will appear at the bottom of a report.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Analyst Group	LOV - List of all analyst groups and the extra choice 'ALL'.	ALL	Y	NAME
Reporting Period	LOV - List of all reporting periods available and the extra choice 'ALL'. The LOV is restricted to the analyst group selected.	ALL	Y	PERIOD_NAME

Data

Column Descriptions

The following table describes each column to be included in the Analyst Compensation Summary Report.

Column Title	Description	Value Length	Column Name/Formula
Functional Currency Type	The functional currency that all the figures are displayed in.	20	?
Salesperson Name	The salesperson's name assigned to the selected analyst group	30	NAME
Salesperson Number	The salesperson's number assigned to the selected analyst group.	10	EMPLOYEE_NUMBER
Salesperson Type	The salesperson's type assigned to the selected salesperson in the analyst group.	20	TYPE
Sales Role	The role assigned to the salesperson in the selected analyst group.	20	NAME
Credit Type	The credit type for the compensation calculation.	10	NAME
Commission	Commission salesperson earned for this period. Value obtained from the Salesperson Worksheet.	15	COMMISSION_EARNED_PTD
Bonus	Bonus salesperson earned for this period. Value obtained from the Salesperson Worksheet.	15	BONUS_EARNED_PTD
Other	Other payments salesperson will receive for this period. Value obtained from the Salesperson Worksheet.	15	OTHER_EARNED_PTD
Subtotal	Subtotal of Commission, Bonus and Other . Value obtained from the Salesperson Worksheet.	25	COMMISSION_EARNED_PTD + BONUS_EARNED_PTD+ OTHER_EARNED_PTD
Advance	Advances to be applied to the salesperson for this pay period. Value obtained from the Salesperson Worksheet.	15	ADVANCE_COMMISSION_PTD
Total Gross Pay	Total of the Subtotal amount less Advance figure.	30	COMMISSION_EARNED_PTD + BONUS_EARNED_PTD+ OTHER_EARNED_PTD+ ADVANCE_COMMISSION_PTD
Commission Pending	Pending Commission salesperson earned for this period. Value obtained from the Salesperson Worksheet.	15	COMMISSION_PENDING_PTD

Column Title	Description	Value Length	Column Name/Formula
Bonus Pending	Pending Bonus salesperson earned for this period	15	BONUS_PENDING_PTD
Total Pending	Total of Pending Commission and Pending Bonus.	25	COMMISSION_PENDING_PT D+ BONUS_PENDING_PTD

Consolidated Compensation Summary



Parameters

Analyst Group Then By

Reporting Period Finally By

Sort By

Run Report

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Functional Currency Type Dollar

Salesperson Name	Salesperson Number	Salesperson Type	Sales Role	Credit Type	Commission	Bonus	Other	Subtotal	Advance	Total Gross Pay	Commission Pending	Bonus Pending	Total Pending
<u>Bob Wiley</u>	11	Employee	Full Time Agent	Cash	7,879	15,000	0	22,879	0	<u>22,879</u>	15,000	0	<u>15,000</u>
<u>Barry Lewis</u>	44	Employee	Full Time Agent	Cash	10,500	10,000	0	20,500	0	<u>20,500</u>	12,000	0	<u>12,000</u>
<u>Delores Jones</u>	45	Employee	Full Time Agent	Cash	11,750	10,000	0	21,750	0	<u>21,750</u>	17,000	0	<u>17,000</u>
<u>Elaine Manley</u>	46	Other	Contractor	Cash	54,000	0	0	54,000	14,000	<u>40,000</u>	0	0	<u>0</u>
<u>Howard Sprague</u>	47	Other	Contractor	Cash	75,000	0	0	75,000	15,000	<u>60,000</u>	0	0	<u>0</u>
<u>Jerrold Feinberg</u>	48	Other	Contractor	Cash	86,530	0	0	86,530	16,500	<u>70,030</u>	0	0	<u>0</u>
<u>Lisa Douglas</u>	49	Other	Contractor	Cash	12,500	25,000	0	37,500	0	<u>37,500</u>	10,000	0	<u>10,000</u>
<u>Pat Murphy</u>	50	Other	Contractor	Cash	17,250	15,000	0	32,250	0	<u>32,250</u>	0	0	<u>0</u>

Related Information:

[Customize](#)[Compensation Summary Report](#)[Payrun Detail Report](#)[Pending Transaction Report](#)

Blind Ranking Report

This performance report ranks members of a sales force with their peers and is used primarily by sales management. The user can choose the standards and measures to run. Compensation analysts use this report to find a salesperson's earnings and sales credits.

The report graphics and layout follow the same format as the existing report with the exception of “Measures”. This report uses security for salesperson and sales management: A salesperson can access only his/her own data and a manager can access data for all people below them in the hierarchy.

Users can enter messages that will appear at the bottom of a report. They can export the information for some fields of this report by using the ‘export to excel function’.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV- All the salespersons’ names and their employee numbers. If not entered a salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	The person that logged in.	Y	NAME
Salesperson Number	LOV - All the salespersons’ numbers. If not entered the salesperson name must be entered. Once a value is selected in the salesperson number field the salesperson name should be automatically populated also.	The person that logged in.	Y	EMPLOYEE_NUMBER
Salesperson Type	LOV - List of all the salesperson types available for this salesperson. Examples are employee and other. This LOV is restricted to the salesperson types applicable to the salesperson and sales role selected.	Employee	Y	TYPE
Sales Role	LOV - All roles available for this salesperson. This LOV is restricted to the salesperson selected.		Y	NAME
Reporting Date	No LOV - The calendar widget should be used.		Y	CALENDAR WIDGET
Measure 1	Choose up to 3 measures by which you want to rank the salesperson. The LOV should be limited to the measures used on this sales role’s compensation plan). For instance, revenue, # of sales calls, customer satisfaction, units, revenue growth % etc. Values are user-defined.	A User definable default value is required.	Y	NAME
Measure 2	Choose up to 3 measures by which you want to rank the salesperson. The LOV should be limited to the measures used on this sales role’s compensation plan). For instance, revenue, # of sales calls, customer satisfaction, units, revenue growth % etc. Values are user-defined.	A user definable default value is required.	N	NAME
Measure 3	Choose up to 3 measures by which you want to rank the salesperson. The LOV should be limited	A user definable	N	NAME

	to the measures used on this sales role's compensation plan). For instance, revenue, # of sales calls, customer satisfaction, units, revenue growth % etc. Values are user-defined.	default value maybe required.		
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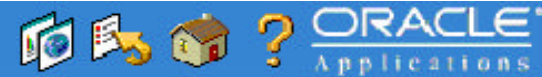
Column Descriptions

The following table describes each column to be included in the Blind Ranking Report. The report graphics and layout follow the same format as the existing report with the exception of “Measures”.

Column Title	Description	Value Length	Column Name/Formula
<Measure> (My Amount / Maximum)%	This is the salespersons performance percentile for measure 1, measure 2 and measure 3 against all the other relevant salespeople with the selected role for the stated period.	10	New formula dependant on the measure that is selected. This functionality needs to be investigated. PERF_ACHIEVED_PTD
<Measure> Rank	The position that a salesperson was ranked against all other relevant salespeople with the selected role and for the stated period.	20	New formula that is dependant on the measure that is selected. This functionality needs to be investigated. PERF_ACHIEVED_PTD

Example One :

Blind Ranking Report



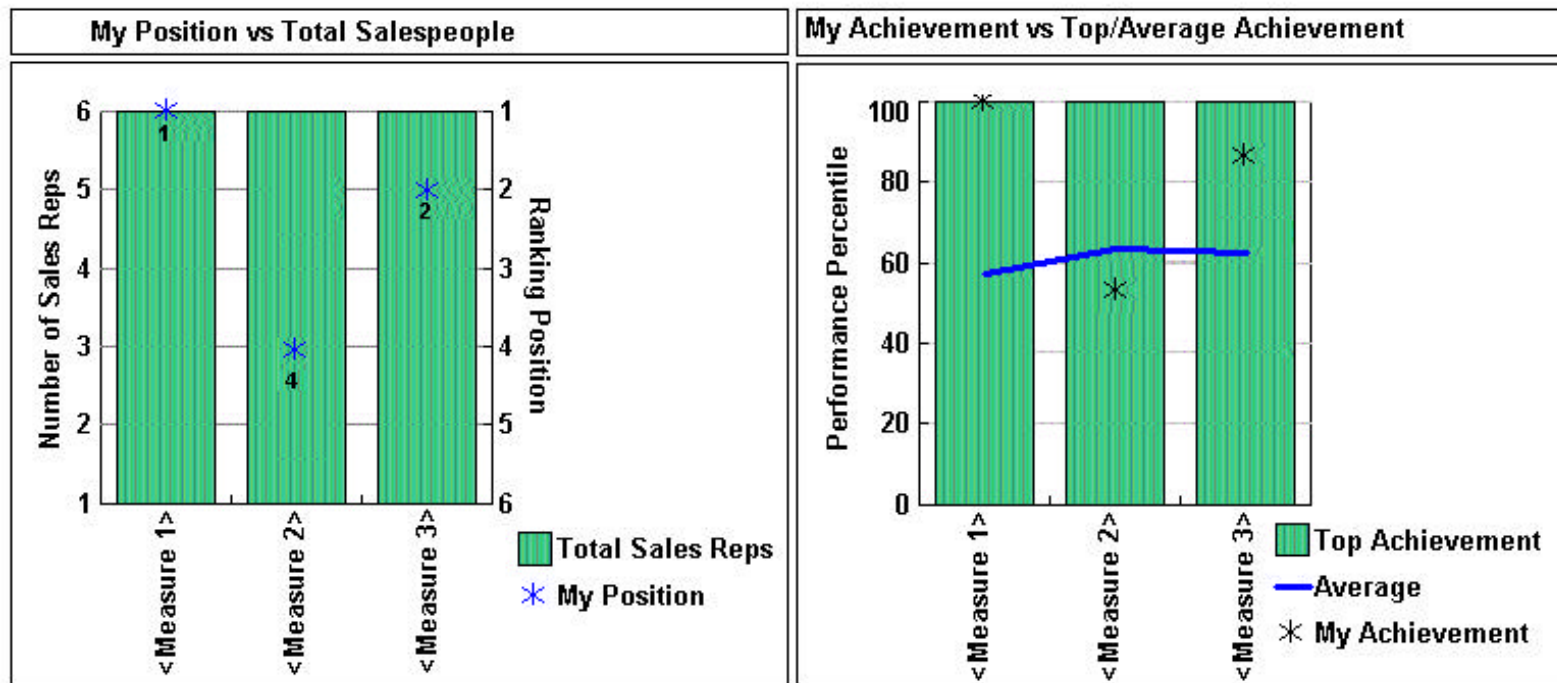
Parameters

Salesperson Name	<input type="text" value="Thomas Selleck"/>	Measure 1	<input type="text" value="<Measure 1>"/>
Salesperson Number	<input type="text" value="26623"/>	Measure 2	<input type="text" value="<Measure 2>"/>
Salesperson Type	<input type="text" value="Employee"/>	Measure 3	<input type="text" value="<Measure 3>"/>
Salesperson Role	<input type="text" value="Agent"/>	Credit Type	<input type="text"/>
Reporting Date	<input type="text" value="15-Jan-1999"/>		

Run Report

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	(My Amount/ Maximum) %	Rank
<Measure 1>	100%	1 out of 6
<Measure 2>	58%	4 out of 6
<Measure 3>	88%	2 out of 6

Related Information:

 [Compensation Summary Report](#)

 [Compensation Details Report](#)

 [Sales Credits Report](#)

 [Performance Details Report](#)

[Customize](#)

Example Two :

Blind Ranking Report



Parameters

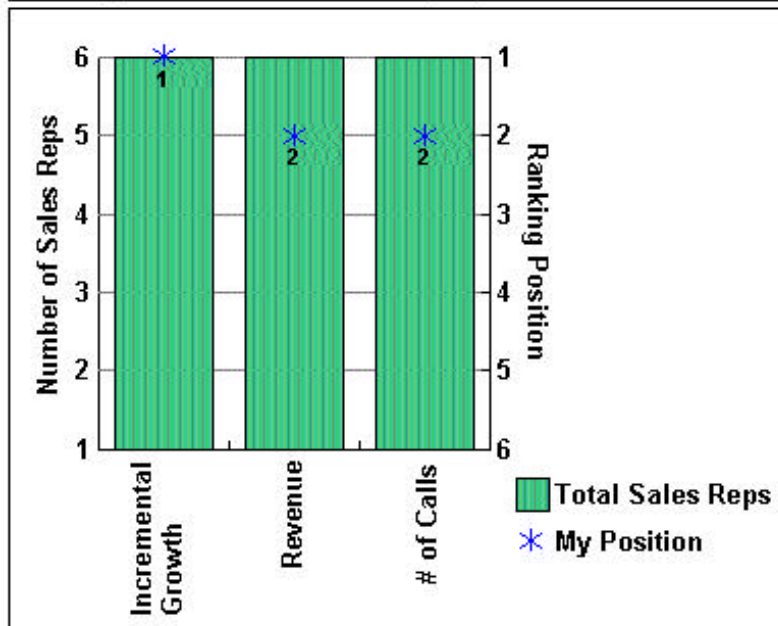
Salesperson Name Measure 1
Salesperson Number Measure 2
Salesperson Type Measure 3
Salesperson Role Credit Type
Reporting Date

Run Report

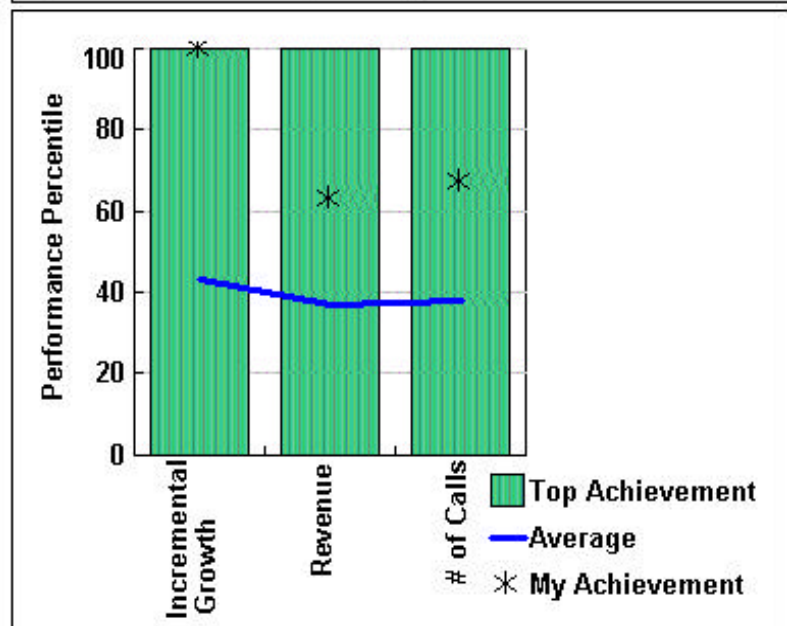
Print

Save to Favorites

My Position vs Total Salespeople



My Achievement vs Top/Average Achievement



	(My Amount/ Maximum) %	Rank
Incremental Growth	100%	1 out of 6
Revenue	63.4%	2 out of 6
# of Calls	67.3%	2 out of 6

Related Information:

 [Compensation Summary Report](#)

 [Compensation Details Report](#)

 [Sales Credits Report](#)

 [Performance Details Report](#)

[Customize](#)

Compensation Group Hierarchy Report

This report displays any compensation group hierarchy specified by users as of any date. The Compensation Group fields link to the Salespeople Hierarchy Report.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Query results show the parent compensation groups/children compensation groups of the search criteria (the compensation group name) all the way to the top/bottom of the hierarchy (direct path). The search criteria phrase is displayed in a different color in the report results so that it stands out from the rest of the rule names. The effective dates for a selected compensation group name are also displayed in a different color.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Compensation Group Name	LOV - All the compensation group names and the extra choice 'ALL'.	ALL	Y	NAME
Effective Date	No LOV - The Calendar feature should be used.	Current date	Y	CALANDER WIDGET

Data

Column Descriptions


The following table describes each column to be included in the Compensation Group Hierarchy Report.

Column Title	Description	Value Length	Column Name/Formula
Compensation Group Names	Display the name of the Compensation Group which is in the hierarchy.	40	NAME
Effective Dates	The compensation group effective date from	26	START_DATE_ACTIVE

Column Title	Description	Value Length	Column Name/Formula
	field concatenated with the compensation group effective date to field.		END_DATE_ACTIVE

Example One:


Compensation Group Hierarchy Report



Parameters






Compensation Group Name
Effective Date

Compensation Group Names	Effective Dates
<u>Oregon</u>	01-Jun-1999 - 28-Feb-1999
<u>West Coast Area</u>	01-Jun-1999 - 28-Feb-1999
<u>West Portland Area</u>	01-Jun-1999 - 28-Feb-1999
<u>Portland</u>	01-Jun-1999 - 28-Feb-1999
<u>Northside</u>	01-Jun-1999 - 28-Feb-1999
<u>Eastside</u>	01-Jun-1999 - 28-Feb-1999
<u>San Francisco</u>	01-Jun-1999 - 28-Feb-1999

Related Information: [Customize](#)
 [Salespeople Hierarchy Report](#)

Example Two:

Compensation Group Hierarchy Report



Parameters

Compensation Group Name

Effective Date


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Compensation Group Names	Effective Dates
<u>Oregon</u>	01-Jun-1999 - 28-Feb-1999
<u>West Coast Area</u>	01-Jun-1999 - 28-Feb-1999
<u>West Portland Area</u>	01-Jun-1999 - 28-Feb-1999
<u>Portland</u>	01-Jun-1999 - 28-Feb-1999
<u>Northside</u>	01-Jun-1999 - 28-Feb-1999
<u>Eastside</u>	01-Jun-1999 - 28-Feb-1999

Related Information:

 [Salespeople Hierarchy Report](#)

[Customize](#)

Compensation Details Report

This report is used primarily by the salesperson and sales manager. It shows plan element details of commission, bonus, and achievement levels by performance measure against quota and goal.

This report mirrors the information provided on the Compensation Detail screen and links to the Compensation Summary, the Compensation Trend Reports, and further detail in the Sales Credit report. The <Plan Element Name> fields link to the Performance Details report.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson numbers should be automatically populated also.	The person who has logged in.	Y	NAME
Salesperson Number	LOV - All the salespersons' numbers. If not entered the salesperson name must be entered . Once a value is selected in the salesperson number field the salesperson name should be automatically populated also.	The person who has logged in.	Y	EMPLOYEE_NUMBER
Salesperson Type	LOV - List of all the salesperson types available for this salesperson. Examples are Employee and Other. This LOV is restricted to the salesperson types applicable to the salesperson and role selected.	Employee	Y	TYPE
Salesperson Role	LOV - All roles available for this salesperson, user should be able to pick 'All', which would represent a summary of all of their roles together. This LOV is restricted to the roles applicable to the salesperson selected.	ALL	Y	NAME
Reporting Period	LOV - List of all accumulated periods available. The LOV is restricted to the role and salesperson.		Y	PERIOD_NAME
Currency Type	Functional or Salesperson currency	Default to the salesperson currency.	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'CURRENCY_TYPE'

Credit Type	LOV - List of all the credit types available for this salesperson. This LOV is restricted to the appropriate values for the salesperson and role selected.		Y	NAME
Compensation Plan	LOV - List of all the compensation plans restricted by the information entered in all the other parameter fields. This is the only "new" parameter when drilling down from the Commission Summary Report the other parameters should default.		Y	NAME

Data

Column Descriptions

The following table describes each column to be included in the Compensation Details Report.

Column Title	Description	Value Length	Column Name/Formula
Summary (Current period) Commission <Plan Element> Incentive Amount	The incentive amount of commission earned by the salesperson during this period for the stated plan element. (Incentive type = Commission)	10	COMM_PAYED_PTD
Summary (Current period) Commission <Plan Element> Measure Amount	The selected measure amount of commission earned by the salesperson during this period for the stated plan element. Revenue, Units, Customer Retention.	10	PERF_ACHEIVED_PTD
Summary (Current period) Commission <Plan Element> Quota Achievement %	The percentage of quota achieved for the stated salesperson during this period for the stated commission plan element. Measure/Quota * 100	10	(PERF_ACHIEVED_PTD/TARGET_AMOUNT)*100
Summary (Current period) Commission <Plan Element> Goal Achievement %	The percentage of goal achieved for the stated salesperson during this period for the stated commission plan element. Measure/Goal * 100	10	(PERF_ACHIEVED_PTD/PERF_GOAL_PTD)*100
Summary (Current period) Bonus <Plan Element> Incentive Amount	The incentive amount of bonus earned by the salesperson during this period for the stated plan element. (Incentive type = Bonus)	10	COMM_PAYED_PTD
Summary (Current period) Bonus <Plan Element> Measure Amount	The selected measure amount of bonus earned by the salesperson during this period for the stated plan element.	10	PERF_ACHIEVED_PTD
Summary (Current period) Bonus <Plan Element> Quota Achievement %	The percentage of quota achieved for the stated salesperson during this period for the stated bonus plan element.	10	(PERF_ACHIEVED_PTD/TARGET_AMOUNT)*100
Summary (Current period) Bonus <Plan Element> Goal Achievement %	The percentage of goal achieved for the stated salesperson during this period for the stated bonus plan element.	10	(PERF_ACHIEVED_PTD/PERF_GOAL_PTD)*100
Advances Beginning Balance	The balance in advances that have not yet been earned. This information can be found on the Compensation Summary screen.	15	(:ADVANCE_TO_REC_ITD - :ADVANCE_RECOVERED_ITD +

Column Title	Description	Value Length	Column Name/Formula
			:RECOVERY_AMOUNT_ITD) - (:ADVANCE_TO_REC_PTD - :ADVANCE_RECOVERED_PTD + RECOVERY_AMOUNT_PTD); Summarized by salesperson.
Advances Current	The amount of advances paid in the current period - This information can be found on the Compensation Summary screen.	15	ADVANCE_TO_REC_PTD
Advances Earned	The amount of advance that has been earned in the current period - this information can be found on the Compensation Summary Screen.	10	ADVANCE_RECOVERED_PTD
Advances Recovery	The amount of advances that will be recovered in this period - this information can be found in the Compensation Summary screen.	10	RECOVERY_AMOUNT_PTD
Advances Ending Balance	Advance Beginning Balance + Advance Current - Earned In Period + Recovery Amount. This information can be found on the Compensation Summary screen.	15	(:ADVANCE_TO_REC_ITD - :ADVANCE_RECOVERED_ITD + :RECOVERY_AMOUNT_ITD)
Details <Plan Element> (In <credit type> <Incentive Type> Current	The incentive amount earned by the salesperson during this period for the stated plan element.	10	COMMISSION_PAYED_PTD
Details <Plan Element> (In <credit type> <Incentive Type> <Interval Name>	The incentive amount earned by the salesperson for the <Interval Name> duration, for the stated plan element.	10	COMMISSION_PAYED_ITD
Details <Plan Element> (In <credit type> Amount Pending Current	The amount of incentive pending for the selected salesperson during this period with the stated plan element.	10	COMM_PEND_PTD
Details <Plan Element> (In <credit type> Amount Pending <Interval Name>	The amount of incentive pending for the selected salesperson during this <Interval Name> duration, with the stated plan element.	10	COMM_PEND_ITD
Details <Plan Element> (In <credit type> <Accumulated Performance Measure> Current	The selected measure amount earned by the salesperson during this period for the stated plan element.	10	PERF_ACHIEVED_PTD
Details <Plan Element> (In <credit type> <Accumulated	The selected measure amount earned by the salesperson for the <Interval Name> duration, for the stated plan element.	10	PERF_ACHIEVED_ITD

Column Title	Description	Value Length	Column Name/Formula
Performance Measure> <Interval Name>			
Details <Plan Element> (In <credit type> Quota Current	The period quota target for the selected plan element assigned to the selected salesperson.	10	TARGET_AMOUNT
Details <Plan Element> (In <credit type> Quota <Interval Name>	The <Interval Name> duration quota target for the selected plan element assigned to the selected salesperson.	10	ITD_TARGET
Details <Plan Element> (In <credit type> Quota Achievement % Current	The percentage of quota achieved for the stated salesperson during this period for the stated plan element. Measure/Quota * 100.	10	(:PERF_ACHIEVED_PTD/:TARGET_AMOUNT)*100)
Details <Plan Element> (In <credit type> Quota Achievement % <Interval Name>	The percentage of quota achieved for the stated salesperson for the <Interval Name> duration and for the stated plan element.	10	((:PERF_ACHIEVED_ITD/ITD_TARGET)*100)
Details <Plan Element> (In <credit type> Amount to Reach Quota Current	The amount of outstanding quota required to reach the selected plan elements quota target set for the current period and for the selected salesperson. Quota - Measure.	10	(:TARGET_AMOUNT-:PERF_ACHIEVED_PTD)
Details <Plan Element> (In <credit type> Amount to Reach Quota <Interval Name>	The amount of outstanding quota required to reach the selected plan elements <Interval Name> duration quota target set for the selected salesperson.	10	(:ITD_TARGET-:PERF_ACHIEVED_ITD)
Details <Plan Element> (In <credit type> Goal Current	The period goal target for the selected plan element assigned to the selected salesperson.	10	PERFORMANCE_GOAL_PTD
Details <Plan Element> (In <credit type> Goal <Interval Name>	The <Interval Name> duration goal target for the selected plan element assigned to the selected salesperson.	10	PERFORMANCE_GOAL_ITD
Details <Plan Element> (In <credit type> Goal Achievement % Current	The percentage of goal achieved for the stated salesperson during this period for the stated plan element.	10	((:PERF_ACHIEVED_PTD/:PERFORMANCE_GOAL_PTD)*100)
Details <Plan Element> (In <credit type> Goal Achievement %	The percentage of goal achieved for the stated salesperson for the <Interval Name> duration, for the stated plan element.	10	((:PERF_ACHIEVED_ITD/:PERFORMANCE_GOAL_ITD)*100)

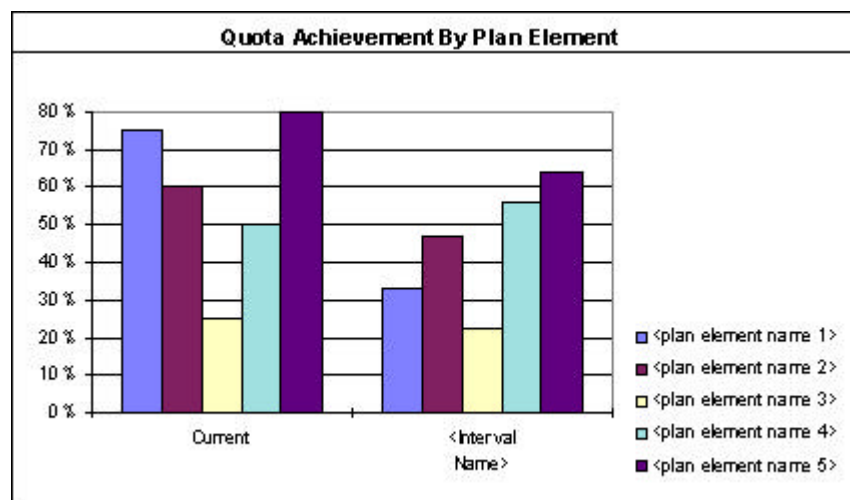
Column Title	Description	Value Length	Column Name/Formula
<Interval Name>			
Details <Plan Element> (In <credit type> Amount to Reach Goal Current	The amount of outstanding goal required to reach the selected plan elements goal target set for the current period and for the selected salesperson. Goal - Measure.	10	(:PERFORMANCE_GOAL_PTD - PERF_ACHIEVED_PTD)
Details <Plan Element> (In <credit type> Amount to Reach Goal <Interval Name>	The amount of outstanding goal required to reach the selected plan elements <Interval Name> duration, goal target set for the selected salesperson.	10	(:PERFORMANCE_GOAL_ITD - :PERF_ACHIEVED_ITD)

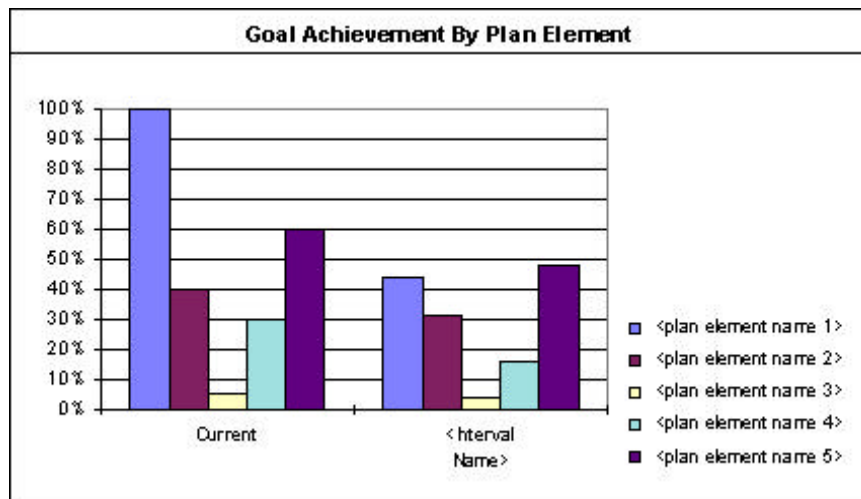
Compensation Details Report



Parameters

Salesperson Name	Thomas Selleck	Reporting Period	May-1999	Year	1999
Salesperson Number	26623	Currency Type	Functional		
Salesperson Type	Employee	Credit Type	<Credit Type>		
Salesperson Role	Agent	Compensation Plan	Comp Plan 1		

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SUMMARY (Current period)	Incentive Amount	Measure Amount	Quota Achievement %	Goal Achievement %
Commission				
<plan element name 1>	300	450,000	75%	100%
<plan element name 2>	300	300,000	60%	40%
Bonus				
<plan element name 3>	200	300	25%	5%
<plan element name 4>	100	30	50%	30%
<plan element name 5>	50	500,000	80%	60%
ADVANCES				
Beginning Balance	100			
Current	200			
Earned	100			
Recovery	50			
Ending Balance	150			
DETAILS				
<Plan Element Name 1>	(In <credit type>)			
	Current	<Interval Name>		
<Incentive Type> Amount	300	350		
Amount Pending	100	100		
<Accumulated Performance Measure> Amount	450,000	600,000		
Quota	600,000	1,800,000		
Quota Achievement %	75%	33%		
Amount to Reach Quota	150,000	1,200,000		
Goal Amount	450,000	1,350,000		
Goal Achievement %	100%	44%		
Amount to Reach Goal	0	750,000		

<Plan Element Name 2>	(In <credit type>)	
	Current	<Interval Name>
<Incentive Type> Amount	300	700
Amount Pending	200	200
<Accumulated Performance Measure> Amount	300,000	700,000
Quota	500,000	1,500,000
Quota Achievement %	60%	47%
Amount to Reach Quota	200,000	800,000
Goal	750,000	2,250,000
Goal Achievement %	40%	31%
Amount to Reach Goal	450,000	1,550,000

<Plan Element Name 3>	(In <credit type>)	
	Current	<Interval Name>
<Incentive Type> Amount	200	700
Amount Pending	50	50
<Accumulated Performance Measure> Amount	300	800
Quota	1,200	3,600
Quota Achievement %	25%	22%
Amount to Reach Quota	900	2,800
Goal	6,000	18,000
Goal Achievement %	5%	4%
Amount to Reach Goal	5,700	17,200

<Plan Element Name 4>	(In <credit type>)	
	Current	<Interval Name>
<Incentive Type> Amount	100	190
Amount Pending	100	100
<Accumulated Performance Measure> Amount	30	100
Quota	60	180
Quota Achievement %	50%	56%
Amount to Reach Quota	30	50
Goal	100	300
Goal Achievement %	30%	16%
Amount to Reach Goal	70	250

<Plan Element Name 5>	(In <credit type>)	
	Current	<Interval Name>
<Incentive Type> Amount	50	70
Amount Pending	20	20
<Accumulated Performance Measure> Amount	500,000	1,200,000
Quota	625,000	1,875,000
Quota Achievement %	80%	64%
Amount to Reach Quota	125,000	675,000
Goal	833,333	2,499,999
Goal Achievement %	60%	48%
Amount to Reach Goal	333,333	1,299,999

Related Information:

 [Compensation Summary Report](#)

 [Sales Credits Report](#)

 [Compensation Trend Report](#)

 [Performance Details Report](#)

[Customize](#)

Compensation Details Report (Fiscal View)

This performance report is used primarily by the salesperson and sales manager. It shows plan element details of commission and bonus, and achievement levels by performance measure against quota and goal. This report shows the current period and interval to date results as well as a fiscal view. When viewed as the fiscal view, the graph shows only the current period.

This report mirrors the information provided on the Compensation Detail screen and links to the Compensation Summary, the Compensation Trend Reports, and further detail in the Sales Credit report. The <Plan Element Name> fields link to the Performance Details report.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson numbers should be automatically populated also.	The person who has logged in.	Y	NAME
Salesperson Number	LOV - All the salespersons' numbers. If not entered the salesperson name must be entered . Once a value is selected in the salesperson number field the salesperson name should be automatically populated also.	The person who has logged in.	Y	EMPLOYEE_NUMBER
Salesperson Type	LOV - List of all the salesperson types available for this salesperson. Examples are Employee and Other. This LOV is restricted to the salesperson types applicable to the salesperson and role selected.	Employee	Y	TYPE
Salesperson Role	LOV - All roles available for this salesperson, user should be able to pick 'All', which would represent a summary of all of their roles together. This LOV is restricted to the roles applicable to the salesperson selected.	ALL	Y	NAME
Credit Type	LOV - List of all the credit types available for this salesperson. This LOV is restricted to the		Y	NAME

	appropriate values for the salesperson and role selected.			
Reporting Period	LOV - List of all accumulated periods available. The LOV is restricted to the role and salesperson.		Y	?
Currency Type	Functional or Salesperson currency	Default to the salesperson currency.	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'CURRENCY_TYPE'
Compensation Plan	LOV - List of all the compensation plans restricted by the information entered in all the other parameter fields.		Y	?

Data

Column Descriptions

The following table describes each column to be included in the Compensation Details Report (Fiscal View).

Column Title	Description	Value Length	Column Name/Formula
Summary (Current period) Commission <Plan Element> Incentive Amount	The incentive amount of commission earned by the salesperson during this period for the stated plan element.	10	?
Summary (Current period) Commission <Plan Element> Measure Amount	The selected measure amount of commission earned by the salesperson during this period for the stated plan element.	10	?
Summary (Current period) Commission <Plan Element> Quota Achievement %	The percentage of quota achieved for the stated salesperson during this period for the stated commission plan element.	10	?
Summary (Current period) Commission <Plan Element> Goal Achievement %	The percentage of goal achieved for the stated salesperson during this period for the stated commission plan element.	10	?
Summary (Current period) Bonus <Plan Element> Incentive Amount	The incentive amount of bonus earned by the salesperson during this period for the stated plan element.	10	?
Summary (Current period) Bonus <Plan Element> Measure Amount	The selected measure amount of bonus earned by the salesperson during this period for the stated plan element.	10	?
Summary (Current period) Bonus <Plan Element> Quota Achievement %	The percentage of quota achieved for the stated salesperson during this period for the stated bonus plan element.	10	?
Summary (Current period) Bonus <Plan Element> Goal Achievement %	The percentage of goal achieved for the stated salesperson during this period for the stated bonus plan element.	10	?
Advances Beginning Balance	The balance in advances that have not yet been earned. This information can be found on the Compensation Summary screen..	15	?

Column Title	Description	Value Length	Column Name/Formula
Advances Current	The amount of advances paid in the current period - This information can be found on the Compensation Summary screen.	15	ADVANCE_PAID_PTD
Advances Earned	The amount of advance that has been earned in the current period - this information can be found on the Compensation Summary Screen.	10	ADVANCE_EARNED_PTD
Advances Recovery	The amount of advances that will be recovered in this period - this information can be found in the Compensation Summary screen.	10	RECOVERY_AMOUNT_PTD
Advances Ending Balance	Advance Beginning Balance + Advance Current - Earned In Period + Recovery Amount. This information can be found on the Compensation Summary screen.	15	?
Details <Plan Element> (In <credit type> <Incentive Type> <Period>	The incentive amount earned by the salesperson during this period for the stated plan element.	10	?
Details <Plan Element> (In <credit type> Amount Pending <Period>	The amount pending for the selected salesperson during this period with the stated plan element.	10	?
Details <Plan Element> (In <credit type> <Accumulated Performance Measure> <Period>	The selected measure amount earned by the salesperson during this period for the stated plan element.	10	?
Details <Plan Element> (In <credit type> Quota <Period>	The period quota target for the selected plan element assigned to the selected salesperson.	10	?
Details <Plan Element> (In <credit type> Quota Achievement % <Period>	The percentage of quota achieved for the stated salesperson during this period for the stated plan element.	10	?
Details <Plan Element> (In <credit type> Amount to Reach Quota <Period>	The amount of outstanding quota required to reach the selected plan elements quota target set for the period and for the selected salesperson.	10	?
Details <Plan Element> (In <credit type> Goal <Period>	The period goal target for the selected plan element assigned to the selected salesperson.	10	?
Details <Plan Element> (In <credit type> Goal	The percentage of goal achieved for the stated salesperson during this period for the stated plan element.	10	?

Column Title	Description	Value Length	Column Name/Formula
Achievement % <Period>			
Details <Plan Element> (In <credit type> Amount to Reach Goal <Period>	The amount of outstanding goal required to reach the selected plan elements goal target set for the period and for the selected salesperson.	10	?

Compensation Details Report (Fiscal View)



Parameters

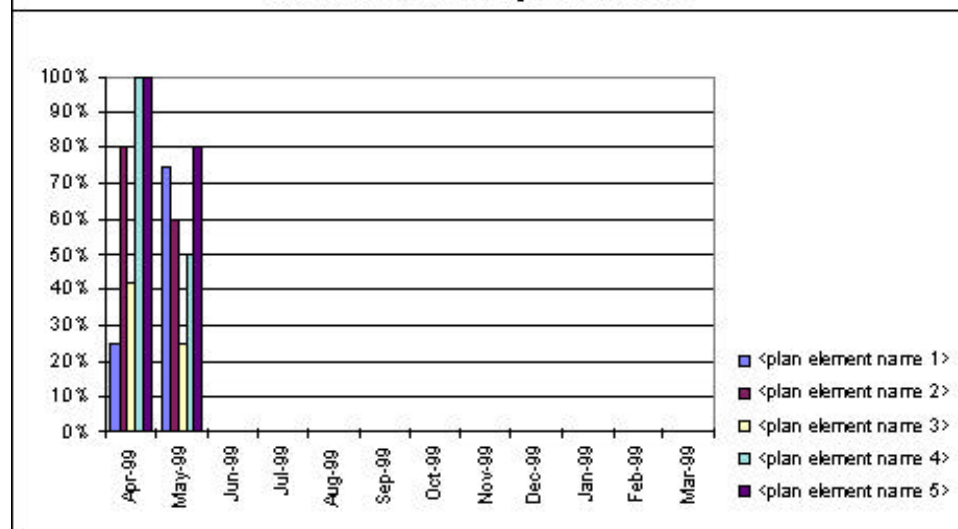
Salesperson Name	Thomas Selleck	Reporting Period	May-1999
Salesperson Number	26623	Currency Type	Functional
Salesperson Type	Employee	Compensation Plan	Comp Plan 1
Salesperson Role	Agent		
Credit Type	<Credit Type>		

Run Report

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Quota Achievement By Plan Element





SUMMARY (Current period)	Incentive Amount	Measure Amount	Quota Achievement %	Goal Achievement %
Commission				
<plan element name 1>	300	450,000	75%	100%
<plan element name 2>	300	300,000	60%	40%
Bonus				
<plan element name 3>	200	300	25%	5%
<plan element name 4>	100	30	50%	30%
<plan element name 5>	50	500,000	80%	60%

ADVANCES

Beginning Balance	100
Current	200
Earned	100
Recovery	50
Ending Balance	150

DETAILS

<Plan Element 1>

(In <credit type>)

	Apr-1999	May-1999	Jun-1999	Jul-1999	Aug-1999	Sep-1999	Oct-1999	Nov-1999	Dec-1999	Jan-1999	Feb-1999
<Incentive Type> Amount	50	300	0	0	0	0	0	0	0	0	0
Amount Pending	0	100	100	100	100	100	100	100	100	100	100
<Accumulated Performance Measure> Amount	150,000	450,000	0	0	0	0	0	0	0	0	0
Quota	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000
Quota Achievement %	25%	75%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Quota	450,000	150,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000
Goal Amount	450,000	450,000	450,000	450,000	450,000	450,000	450,000	450,000	450,000	450,000	450,000
Goal Achievement %	33%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Goal	300,000	0	450,000	450,000	450,000	450,000	450,000	450,000	450,000	450,000	450,000

<Plan Element 2>**(In <credit type>)**

	Apr-1999	May-1999	Jun-1999	Jul-1999	Aug-1999	Sep-1999	Oct-1999	Nov-1999	Dec-1999	Jan-1999	Feb-1999
<Incentive Type> Amount	400	300	0	0	0	0	0	0	0	0	
Amount Pending	0	200	200	200	200	200	200	200	200	200	200
<Accumulated Performance Measure> Amount	400,000	300,000	0	0	0	0	0	0	0	0	
Quota	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000
Quota Achievement %	80%	60%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Quota	100,000	200,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000
Goal Amount	750,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000
Goal Achievement %	53%	40%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Goal	350,000	450,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000

<Plan Element 3>**(In <credit type>)**

	Apr-1999	May-1999	Jun-1999	Jul-1999	Aug-1999	Sep-1999	Oct-1999	Nov-1999	Dec-1999	Jan-1999	Feb-1999
<Incentive Type> Amount	500	200	0	0	0	0	0	0	0	0	
Amount Pending	0	50	50	50	50	50	50	50	50	50	50
<Accumulated Performance Measure> Amount	500	300	0	0	0	0	0	0	0	0	
Quota	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200
Quota Achievement %	42%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Quota	700	900	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200
Goal Amount	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000
Goal Achievement %	8%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Goal	5,500	5,700	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000

<Plan Element 4>**(In <credit type>)**

	Apr-1999	May-1999	Jun-1999	Jul-1999	Aug-1999	Sep-1999	Oct-1999	Nov-1999	Dec-1999	Jan-1999	Feb-1999
<Incentive Type> Amount	90	100	0	0	0	0	0	0	0	0	
Amount Pending	0	100	100	100	100	100	100	100	100	100	100
<Accumulated Performance Measure> Amount	70	30	0	0	0	0	0	0	0	0	
Quota	60	60	60	60	60	60	60	60	60	60	60
Quota Achievement %	100%	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Quota	0	30	60	60	60	60	60	60	60	60	60
Goal Amount	100	100	100	100	100	100	100	100	100	100	100
Goal Achievement %	70%	30%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Goal	30	70	100	100	100	100	100	100	100	100	100

<Plan Element 5>**(In <credit type>)**

	Apr-1999	May-1999	Jun-1999	Jul-1999	Aug-1999	Sep-1999	Oct-1999	Nov-1999	Dec-1999	Jan-1999	Feb-1999
<Incentive Type> Amount	20	50	0	0	0	0	0	0	0	0	
Amount Pending	0	20	20	20	20	20	20	20	20	20	20
<Accumulated Performance Measure> Amount	700,000	500,000	0	0	0	0	0	0	0	0	
Quota	625,000	625,000	625,000	625,000	625,000	625,000	625,000	625,000	625,000	625,000	625,000
Quota Achievement %	100%	80%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Quota	0	125,000	625,000	625,000	625,000	625,000	625,000	625,000	625,000	625,000	625,000
Goal Amount	833,333	833,333	833,333	833,333	833,333	833,333	833,333	833,333	833,333	833,333	833,333
Goal Achievement %	84%	60%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Goal	133,333	333,333	833,333	833,333	833,333	833,333	833,333	833,333	833,333	833,333	833,333

Performance Reports

Compensation Summary Report

This report mirrors the information provided on the Compensation Summary screen. The primary users of this performance report are sales representatives and sales managers. Compensation analysts use this report to find a salesperson's earnings and sales credits.

You can export this information by using the 'export to excel' function.

Administrators can enter user-defined messages that will appear at the bottom of each report to be distributed to the sales force. Note that the graph figures used in this example are hypothetical data and do not match the figures in the report layout example, nor do the figures total up correctly. Instead, the figures are used to highlight how values should be displayed.

The current period commission and current period bonus figures link to the Compensation Details report. The current period gross pay <period range> fields link to the Payrun Detail Report. The commission pending and bonus pending fields link to the Pending Transactions Report.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	The person who has logged in.	Y	NAME
Salesperson Role	LOV - All roles available for this salesperson, user should be able to pick "ALL", which would represent a summary of all of their roles together. This LOV is restricted to the roles applicable to the salesperson selected.	ALL	Y	NAME
Reporting Period	LOV - List of all Accumulated periods available. The LOV is restricted to the role and salesperson.		Y	PERIOD_NAME
Currency Type	Functional or Rep Currency	Default to the Salesperson Currency.	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'CURRENCY_TYPE'
Credit Type	LOV - List of all the credit types available for this salesperson. The LOV is restricted to the appropriate values for the salesperson and sales role selected.		Y	NAME

Column Descriptions

The following table describes each column to be included in the Compensation Summary Report.

Column Title	Description	Value Length	Column Name/Formula
Commission	The amount of commission earned by the salesperson during this period quarter-to-date year-to-date - This information can be found on the Compensation Summary screen.	10	For period COMMISSION_EARNED_PTD For quarter-to-date COMMISSION_EARNED_QTD For year-to-date COMMISSION_EARNED_YTD
Bonus	The amount of bonus earned by the salesperson during this period quarter-to-date year-to-date - This information can be found on the compensation Summary screen.	10	For period BONUS_EARNED_PTD For quarter-to-date BONUS_EARNED_QTD For year-to-date BONUS_EARNED_YTD
Other	Manual Bonus - This information can be found on the Compensation Summary screen.	10	For period OTHER_EARNED_PTD For quarter-to-date OTHER_EARNED_QTD For year-to-date OTHER_EARNED_YTD
Advance Commission	The amount of commission being advanced to the salesperson in the current period - this information can be found on the Compensation Summary Screen.	10	For period ADVANCE_COMMISSION_PTD For quarter-to-date ADVANCE_COMMISSION_QTD For year-to-date ADVANCE_COMMISSION_YTD

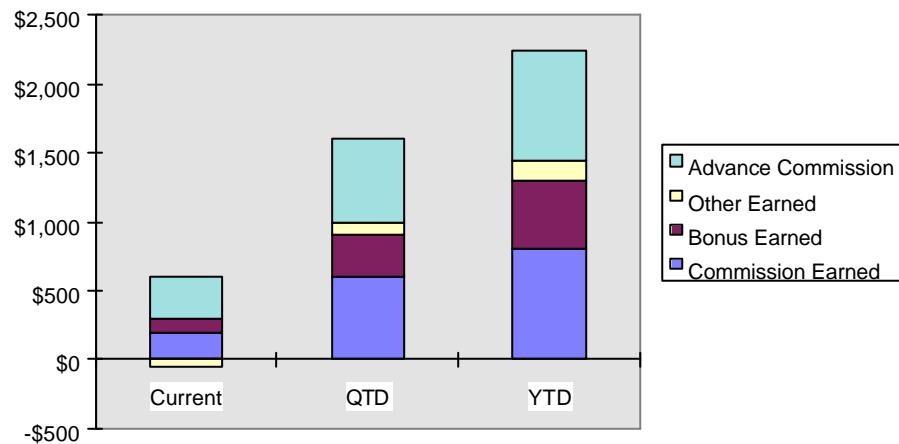
Column Title	Description	Value Length	Column Name/Formula
			D
Total Compensation	The total amount of Commission Earned, Bonus Earned, Other Earned and Advance Commissions - This information can be found on the Compensation Summary Screen.	10	For period COMMISSION_EARNED_PTD + BONUS_EARNED_PTD + OTHER_EARNED_PTD + ADVANCE_COMMISSION_PT D For quarter-to-date COMMISSION_EARNED_QTD + BONUS_EARNED_QTD + OTHER_EARNED_QTD + ADVANCE_COMMISSION_QT D For year-to-date COMMISSION_EARNED_YTD + BONUS_EARNED_YTD + OTHER_EARNED_YTD + ADVANCE_COMMISSION_YT D
Gross Payment	List all payment for this accumulation period - This information can be found on the Compensation Summary screen.	10	GROSS_PAY
Total Payments	Summarize all payruns - this information can be found on the Compensation Summary screen.	15	Total of "Gross Payment" (GROSS_PAY)
Advance - Begin	The balance in advances that have not yet been earned - This information can be found on the Compensation Summary screen.	10	(ADVANCE_PAID_YTD - ADVANCE_EARNED_YTD + RECOVERY_AMOUNT_YTD) - (ADVANCE_PAID_PTD - ADVANCE_EARNED_PTD + RECOVERY_AMOUNT_PTD)
Advance - Current	The amount of advances paid in the current period - This information can be found on the Compensation Summary screen.	15	ADVANCE_PAID_PTD
Earned in Current Period	The amount of advances that has been earned in the current period - this information can be found on the Compensation Summary screen.	10	ADVANCE_EARNED_PTD
Recovery Amount	The amount of advances that will be recovered in this period - this information can be found on the Compensation Summary screen.	10	RECOVERY_AMOUNT_PTD
Advances - End Balance	Advances Beginning Balance + Advances Current - Earned in Period + Recovery Amount - This	15	ADVANCE_PAID_YTD - ADVANCE_EARNED_YTD +

Column Title	Description	Value Length	Column Name/Formula
	information can be found on the Compensation Summary screen.		RECOVERY_AMOUNT_YTD
Commission Pending	The amount of commission this is pending payment because it did not pass validation - this information can be found on the Compensation Summary screen.	10	COMMISSION_PENDING_PTD
Bonus Pending	The amount of bonus that is pending because it did not pass validation - this information can be found on the Compensation Summary screen.	10	BONUS_PENDING_PTD

Compensation Summary Report

**Parameters**

Salesperson Name Reporting Period
Salesperson Number Currency Type
Salesperson Type Credit Type
Salesperson Role

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	Current Period	QTD	YTD	Advances	
Commission	<u>200</u>	200	200	Beginning Balance	1,000
Bonus	<u>100</u>	100	100	Paid in Current Period	100
Other	50	50	50	Earned in Current Period	300
Advance Commission	130	130	130	Amount Recovered	(500)
Total Compensation	480	480	480	Ending Balance	<u>300</u>
Gross Pay 15-Oct-1997	<u>300</u>			Pending	
Gross Pay 28-Oct-1997	<u>100</u>			Commission Pending	<u>100</u>
Total Payments	400			Bonus Pending	<u>50</u>

Related Information:

-  [Compensation Details Report](#)
-  [Payrun Detail Report](#)
-  [Pending Transactions Report](#)
-  [Sales Credits Report](#)

-  [Blind Ranking Report](#)
-  [Compensation Trend Report](#)

[Customize](#)

Hierarchy Report

This report shows hierarchy structure for all “dimension” hierarchies such as revenue classes, customers, and products. Users can enter messages that will appear at the bottom of a report.

The results of a query show parent rules/children rules of the search criteria (rule name) all the way to the top/bottom of the hierarchy (direct path). The search criteria phrase is displayed in a different color in the report results so that it stands out from the other rule names that are returned as a result of the query.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Dimension Name	LOV- All the dimensions defined by the user.		Y	NAME
Hierarchy Name	LOV- All the hierarchies defined by the user . This list is dependent on the Dimension Name parameter.		Y	NAME
Node Name	LOV - All the available nodes for any given hierarchy and the extra choice 'ALL'. This list is dependent on the Dimension Name and Hierarchy Name parameters.	ALL	Y	NAME
Effective Date	No LOV - The Calendar feature should be used.	Current Date	Y	CALANDER WIDGET

Data


Column Descriptions

The following table describes each column to be included in the Hierarchy Report.

Column Title	Description	Value Length	Column Name/Formula
Hierarchy Node Name	Display the name of the item which is in the hierarchy, for example, salesperson, revenue class. Also display the value of the primary key for the dimension defined if different to the name, for example, Salesrep_id in the Salesrep hierarchy. This field is indented to represent different levels in the hierarchy. Show up to four levels at any one time.	40	NAME

Example One:

Hierarchy Report



Parameters

Dimension Name

Revenue Class

Hierarchy Name

Revenue Class

Node Name

All Hardware

Effective Date

15-Jan-1999

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Hierarchy Node
Name

All Hardware

- All Computers
- Dell
Compaq
HP
- Monitors
- Drive and Cards

Related Information:

[Customize](#)

Example Two:

Hierarchy Report



Parameters

Dimension Name

Hierarchy Name

Node Name

Effective Date

Run Report

Print

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Hierarchy Node Name

All Hardware

All Computers

Dell
Compaq
HP

Related Information:

[Customize](#)

Payee Report

This report lists sales payees and the amounts they are being paid. The commission and bonus fields link to the Compensation Summary report. The gross pay fields link to the Payrun Detail report.

You can enter messages that will appear at the bottom of a report. You can export information from this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Payee Name	LOV - All the payee' names and the extra choice 'All'. If not entered the payee number must be entered. Once a value is selected in the payee name field the payee number field should be automatically populated also.	All	Y	?
Payee Number	LOV - All the payee' numbers and the extra choice 'All'. If not entered the payee name must be entered. Once a value is selected in the payee number field the payee name field should be automatically populated also.	All	Y	?
Payee Type	LOV -All payee types available for payee's and the extra choice 'All'. If payee information has been entered, restrict this LOV further using the payee values entered.	All	Y	?
Sales Role	LOV - All roles available for payee's and the extra choice 'All'. If payee information has been entered, restrict this LOV further using the payee values entered.	All	Y	?
Payrun Name	LOV - All payrun names and the extra choice 'ALL'.	All	Y	?
Pay Period	LOV.- All pay periods and the	All	Y	?

	extra choice 'All'.			
Pay Date	LOV - All pay dates and the extra choice 'All'.	All	Y	?
Sort By	LOV - All the fields used in this report stated in the data section.		N	New functionality
Then By	LOV - All the fields used in this report except the one stated in the 'sort by' parameter. If no value is entered in the 'sort by' column then this parameter should be disabled.		N	New functionality
Finally By	LOV - All the fields used in this report except the values entered in the 'sort by' and 'finally by' parameter fields. If no value is entered in the 'then by' column then this parameter should be disabled.		N	New functionality

Data

Column Descriptions

The following table describes each column to be included in the Payee Report.

Column Title	Description	Value Length	Column Name/Formula
Payee Name	The payee's name receiving payment	?	?
Payee Number	The payee's number receiving payment	?	?
Payee Type	The payee's type.		
Sales Role	The role assigned to the payee receiving payment.	?	?
Cost Center	The payee's cost center(s)	?	?
Credit Type	The credit type for the compensation calculation.	?	?
Commission	Commission payee earned for this period.	?	?
Bonus	Bonus payee earned for this period	?	?
Gross Pay	The payee's gross pay figure	?	?

Payee Report



Parameters

Payee Name	All	Payrun Name	BJun-96	Then By	
Payee Number	All	Pay Period	Jun-99	Finally By	
Payee Type	All	Pay Date	15-Jun-1999		
Sales Role	All	Sort By	Salesperson N		

Run Report

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Payee Name	Payee Number	Payee Type	Sales Role	Cost Center	Credit Type	Commission	Bonus	Gross Pay
Bob Wiley	11	Employee	Full Time Agent	D67	Dollar	<u>58,065.00</u>	<u>58,065.00</u>	<u>58,065.00</u>
Barry Lewis	44	Employee	Full Time Agent	D67	Dollar	<u>4,999.64</u>	<u>4,999.64</u>	<u>4,999.64</u>
Delores Smith-Jones	45	Employee	Full Time Agent	D67	Dollar	<u>42,419.35</u>	<u>42,419.35</u>	<u>42,419.35</u>
Elaine Manley	46	Other	Contractor	D67	Dollar	<u>152,887.22</u>	<u>152,887.22</u>	<u>152,887.22</u>
Howard Sprague	47	Other	Contractor	D67	Dollar	<u>54,077.25</u>	<u>0.00</u>	<u>54,077.25</u>
Jerrold Feinberg	48	Other	Contractor	D67	Dollar	<u>30,058.27</u>	<u>30,058.27</u>	<u>30,058.27</u>
Lisa Douglas	49	Other	Contractor	D67	Dollar	<u>5,793.10</u>	<u>5,793.10</u>	<u>5,793.10</u>
Pat Murphy	50	Other	Contractor	D67	Dollar	<u>28,451.48</u>	<u>28,451.48</u>	<u>28,451.48</u>
Grand Total						<u>376,751.31</u>	<u>322,674.06</u>	<u>376,751.31</u>

Related Information:

 [Compensation Summary Report](#)

 [Payrun Detail Report](#)

[Customize](#)

Compensation Trend Report

This report summarizes a salesperson's compensation earnings. It lists earnings by category, including advances, minimums and maximums, and amounts paid. It shows every period side-by-side for comparison and pulls information from the same database that supplies the Compensation Summary screen and report. The information is valuable mainly to the sales representative, sales manager, and compensation analyst. The total payments figures link to the Payrun Detail Report.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

You cannot display a period in the future for which a commission has not already been earned.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV- All the salespersons' names and their employee numbers. If not entered a salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	The person that logged in.	Y	NAME
Salesperson Number	LOV - All the salespersons' numbers. If not entered the salesperson name must be entered. Once a value is selected in the salesperson number field the salesperson name should be automatically populated also.	The person that logged in.	Y	EMPLOYEE_NUMBER
Salesperson Type	LOV - List of all the salesperson types available for this salesperson. Examples are employee and other. This LOV is restricted to the salesperson types applicable to the salesperson and sales role selected.	Employee	Y	TYPE
Sales Role	LOV - All roles available for this salesperson. This LOV is restricted to the salesperson selected.		Y	NAME
Credit Type	LOV - List of all the credit types available for this salesperson. The LOV is restricted to the role, type and salesperson.		Y	NAME
Currency Type	Functional or Salesperson currency	Default to the salesperson currency	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'CURRENCY_TYPE'
Start Period	LOV - List of all available periods. This list is restricted to the reporting periods available for the selected salesperson with the selected role and resource type.		Y	PERIOD_NAME
End Period	LOV - List of all available periods. This list is restricted to a maximum of 12 available periods after the period selected in the start period parameter. A can't enter an end date period if a start period has not been entered. This list is also restricted to the reporting periods available for the selected salesperson with the selected role and resource type.	Should default to twelve months from the start period or the latest available period	Y	PERIOD_NAME

		stated in the LOV.		
--	--	-----------------------	--	--

Data

Column Descriptions

The following table describes each column to be included in the Compensation Trend Report.

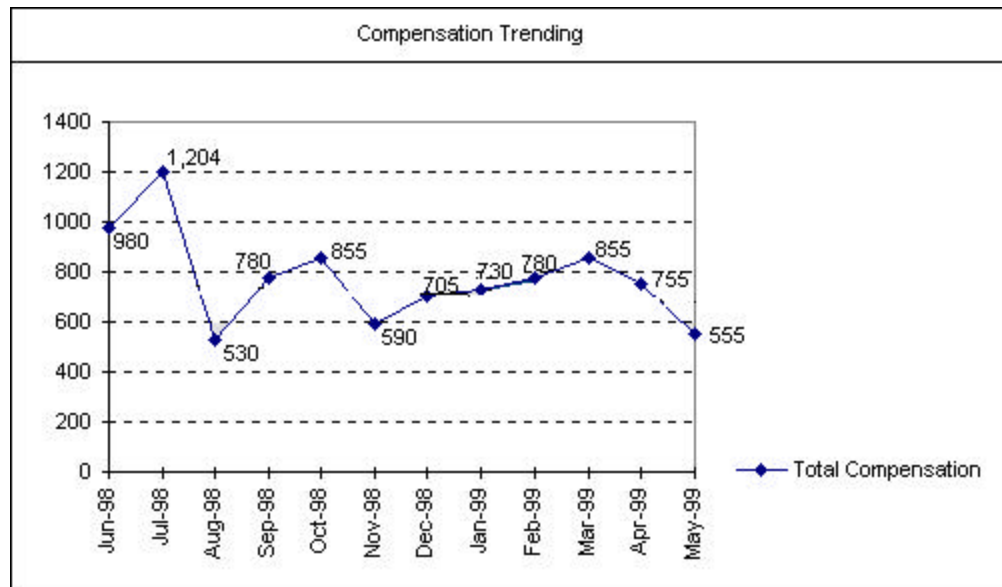
Column Title	Description	Value Length	Column Name/Formula
Commission	The amount of commission earned by the salesperson during this selected stated period	10	COMMISSION_EARNED_PTD
Bonus	The amount of bonus earned by the salesperson during the selected stated period	10	BONUS_EARNED_PTD
Other	The manual bonus amount earned by the salesperson during the selected stated period.	10	OTHER_EARNED_PTD
Advance Commission	The amount of commission being advanced to the salesperson in the selected stated period.	10	ADVANCE_COMMISSION_PTD
Total Compensation	The total amount of commission earned, bonus earned, other earned and advance commissions - This information can be found on the Compensation Summary Screen for each selected stated period.	10	COMMISSION_EARNED_PTD + BONUS_EARNED_PTD + OTHER_EARNED_YTD + ADVANCE_EARNED_YTD
Total Payments	Summarise all payruns over the selected stated periods - This information can be found on the compensation summary screen.	10	?

Compensation Trending Report



Parameters

Salesperson Name	Thomas Selleck	Credit Type	Dollar
Salesperson Number	26623	Currency Type	Functional
Salesperson Type	Employee	Start Period	Jun-98
Sales Role	Agent	End Period	May-99

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	Jun-98	Jul-98	Aug-98	Sep-98	Oct-98	Nov-98	Dec-98	Jan-99	Feb-99	Mar-99	Apr-99	May-99
Commission	700	999	350	500	600	400	475	500	600	600	600	300
Bonus	100	75	25	100	75	60	50	50	50	75	0	75
Other	50	0	25	50	50	0	50	50	0	50	25	50
Advance Commission	130	130	130	130	130	130	130	130	130	130	130	130
Total Compensation	980	1,204	530	780	855	590	705	730	780	855	755	555
Total Payments	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>

Related Information:

 [Compensation Details Report](#)

 [Blind Ranking Report](#)

[Customize](#)

 [Payrun Detail Report](#)

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Payrun Listing Report

This report displays the details for salespeople who were paid for a specified payrun date or payrun name. The gross pay figures link to the payrun detail report.

If you select 'All' in the payrun name parameter and in the pay group parameter, more than one payrun/pay group may be returned. In this instant the layout body as shown below will be replicated for each unique payrun.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Payrun Name	LOV - All the payrun names with the extra option 'All'.	All	Y	NAME

Pay Group	LOV - All the pay groups with the extra option 'All' If a payrun name is selected then this lov should be restricted based on that value.	All	Y	NAME
Pay Period	LOV - All the pay periods. This parameter is restricted to the applicable pay periods for the selected payrun name (If specified) and pay group (If specified).		Y	PERIOD_NAME
Pay Date	NO LOV - The calendar feature should be used.		N	CALANDER WIDGET
Credit Type	LOV - All the credit types. This parameter is restricted to the applicable credit types for the selected payrun name (If specified), pay group (If specified), pay period and pay date.		Y	NAME

Data

Column Descriptions

The following table describes each column to be included in the Payrun Listing Report.

Column Title	Description	Value Length	Column Name/Formula
Payrun Name	The payrun name that you have selected, or the payrun name relevant to the pay group selected.	20	NAME
Salesperson Name	The names of salespeople who are part of selected payrun(s).	30	NAME
Salesperson Number	The salesperson numbers for salespeople who are part of selected payrun(s).	15	EMPLOYEE_NUMBER
Salesperson Type	The resource types for the salespeople in the selected payrun(s).	20	TYPE
Sales Role	The roles for the salespeople in the selected payrun(s).	20	NAME
Charge-To Cost Center	The charge to cost centers for the salespeople in the selected payrun(s).	10	COST_CENTER_ID
Gross Pay<In Credit Type>	Gross Pay salespeople earn for this period. Value obtained from the Salesperson Worksheet.	25	COMM_PAID + REG_BONUS_PAID + BONUS_PAID + PAYEE_COMM_PAID + PAYEE_BONUS_PAID

Payrun Listing Report



Parameters

Payrun Name Pay Date
 Pay Group Credit Type
 Pay Period

Run Report

Print

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Payrun Name: BJan-96

Salesperson Name	Salesperson Number	Salesperson Type	Sales Role	Charge To Cost Center	Gross Pay <In Dollar>
Bob Wiley	11	Employee	Full Time Agent	1232	<u>58,065.51</u>
Barry Lewis	44	Employee	Full Time Agent	1232	<u>4,999.64</u>
Delores Smith-Jones	45	Employee	Full Time Agent	1232	<u>42,419.35</u>
Elaine Manley	46	Others	Contractor Agent	1232	<u>152,887.2</u>
					<u>2</u>
Howard Sprague	47	Others	Contractor Agent	1232	<u>54,077.25</u>
Jerrold Feinberg	48	Others	Contractor Agent	1232	<u>30,058.27</u>
Lisa Douglas	49	Others	Contractor Agent	1232	<u>5,793.10</u>
Pat Murphy	50	Others	Contractor Agent	1232	<u>28,451.48</u>
Grand Total					<u><u>376,751.3</u></u>
					<u><u>1</u></u>

Related Information:

 [Payrun Detail Report](#)

[Customize](#)

Payrun Detail Report

This report displays the payrun details for an individual salesperson for a payrun, pay period, and pay date. It also shows amounts in a salesperson's required credit type.

If the selected credit type is the same as the functional credit type, those columns returned in the report will be identical. The amount to pay (functional and salesperson) figures link to 'Other Details' in the lower section of the report.

You can enter messages that will appear at the bottom of a report. You can export information from this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.		Y	NAME
Salesperson Number	LOV - All the salespersons' numbers. Once a value is selected in the salesperson number field the salesperson name should be automatically populated also.		Y	EMPLOYEE_NUMBER
Salesperson Type	LOV - List of all the salesperson types available for this salesperson. Examples are Employee and Other. This LOV is restricted to the salesperson types applicable to the salesperson and role selected.	Employee	Y	TYPE
Sales Role	LOV - All roles available for this salesperson. This LOV is restricted to the roles applicable to the salesperson selected.		Y	NAME
Payrun Name	LOV - All the payrun names. This parameter is restricted to the applicable payrun names for the salesperson and the role, type entered.		Y	NAME
Pay Period	LOV - All the pay periods. This parameter is restricted to the applicable pay periods for the salesperson, role and payrun name entered.		Y	? - Not sure where the PAY_PERIOD_ID is linked to display the period in the correct

				format.
Pay Date	LOV - All the pay dates. This parameter is restricted to the applicable pay dates for the salesperson, role, payrun name and pay period entered.		Y	PAY_DATE
Credit Type	LOV - List all the credit types. This parameter is restricted to the applicable credit types for the salesperson, role, payrun name, pay period and pay date entered.	Default to the selected salespersons 'From' Credit Type	Y	NAME
Returned Fund				

Column Descriptions

The following table describes each column to be included in the Payrun Detail Report.

Column Title	Description	Value Length	Column Name/Formula
Commission Beginning Balance	The beginning commission balance amount for the selected salesperson.	20	COMM_DUE_BB
Commission Amount Due	The commission amount due for the selected salesperson.	20	COMM_PTD
Commission Recoverable Amount	The recoverable commission amount for the selected salesperson.	20	DRAW_PAID
Commission Non-Recoverable Amount	The non-recoverable commission amount for the selected salesperson.	20	COMM_NREC
Commission Amount To Recover	The commission amount to recover for the selected salesperson.	20	COMM_DRAW
Commission Amount To Pay In <Functional Credit Type>	The commission amount to pay for the selected salesperson.	20	COMM_PAID
Commission Amount To Pay In <Salesperson Credit Type>	The commission amount to pay for the selected salesperson in the appropriate credit type.	20	?
Comments/Reasoning	The reason/comments assigned if the commission amount figure has been amended or requires some means of justification.	35	REASON
Bonus Beginning Balance	The beginning bonus balance to pay for the selected salesperson.	20	REG_BONUS_DUE_BB
Bonus Amount Due	The bonus amount due for the selected salesperson.	20	REG_BONUS_PTD
Bonus Recoverable Amount	The recoverable bonus amount for the selected salesperson.	20	REG_BONUS_REC
Bonus Amount To Recover	The bonus amount to recover for the selected salesperson.	20	REG_BONUS_TO_REC
Bonus Amount To Pay In <Functional Credit Type>	The bonus amount to pay for the selected salesperson.	20	REG_BONUS_PAID
Bonus Amount To Pay In <Salesperson Credit Type>	The bonus amount to pay for the selected salesperson in the appropriate credit type.	20	?
Comments/Reasoning	The reason/comments assigned if the bonus amount figure has been amended or requires some means of justification.	35	BONUS_REASON
Other Beginning Balance	The beginning other balance to pay for the selected salesperson.	20	BONUS_DUE_BB

Column Title	Description	Value Length	Column Name/Formula
Other Amount Due	The other amount due for the selected salesperson.	20	BONUS_PTD
Other Amount To Pay In <Functional Credit Type>	The other amount to pay for the selected salesperson.	20	BONUS_PAID
Other Amount To Pay In <Salesperson Credit Type>	The other amount to pay for the selected salesperson in the appropriate credit type.	20	?
Subtotal Beginning Balance	The subtotal of the beginning commission, bonus and other balances for the selected salesperson.	20	COMM_DUE_BB + REG_BONUS_DUE_BB + BONUS_DUE_BB
Subtotal Amount Due	The subtotal amount due (Commission, bonus and other) for the selected salesperson.	20	COMM_PTD + REG_BONUS_PTD + BONUS_PTD
Subtotal Recoverable Amount	The subtotal recoverable amount (Commission, bonus and other) for the selected salesperson.	20	DRAW_PAID + REG_BONUS_REC
Subtotal Non-Recoverable Amount	The subtotal non-recoverable amount (Commission, bonus and other) for the selected salesperson.	20	COMM_NREC
Subtotal Amount To Recover	The subtotal amount to recover (Commission, bonus and other) for the selected salesperson.	20	COMM_DRAW + REG_BONUS_TO_REC
Subtotal Amount To Pay In <Functional Credit Type>	The subtotal amount to pay (Commission, bonus and other) for the selected salesperson.	20	COMM_PAID + REG_BONUS_PAID + BONUS_PAID
Subtotal Amount To Pay In <Salesperson Credit Type>	The subtotal amount to pay (Commission, bonus and other) for the selected salesperson in the appropriate credit type.	20	?
Payee Commission Beginning Balance	The beginning payee commission balance to pay for the selected salesperson(s).	20	PAYEE_COMM_DUE_BB
Payee Commission Amount Due	The payee commission amount due for the selected salesperson(s).	20	PAYEE_COMM_PTD
Payee Commission Amount To Pay In <Functional Credit Type>	The payee commission amount to pay for the selected salesperson(s).	20	PAYEE_COMM_PAID
Payee Commission Amount To Pay In <Salesperson Credit Type>	The payee commission amount to pay for the selected salesperson(s).	20	?
Payee Bonus Beginning Balance	The beginning payee bonus balance to pay for the selected salesperson(s).	20	PAYEE_BONUS_DUE_BB
Payee Bonus Amount Due	The payee bonus amount due for the selected salesperson(s).	20	PAYEE_BONUS_PTD
Payee Bonus Amount To Pay In <Functional Credit Type>	The payee bonus amount to pay for the selected salesperson(s).	20	PAYEE_BONUS_PAID
Payee Bonus Amount To Pay In <Salesperson Credit Type>	The payee bonus amount to pay for the selected salesperson(s) in the appropriate	20	?

Column Title	Description	Value Length	Column Name/Formula
	credit type.		
Grand Total Beginning Balance	The grand total of the beginning commission, bonus, other, payee commission and payee bonus balances for the selected salesperson.	25	COMM_DUE_BB + REG_BONUS_DUE_BB + BONUS_DUE_BB + PAYEE_COMM_DUE_BB + PAYEE_BONUS_DUE_BB
Grand Total Amount Due	The grand total amount due (Commission, bonus, other, payee commission and payee bonus) for the selected salesperson.	25	COMM_PTD + REG_BONUS_PTD + BONUS_PTD + PAYEE_COMM_PTD + PAYEE_BONUS_PTD
Grand Total Recoverable Amount	The grand total recoverable amount (Commission, bonus, other, payee commission and payee bonus) for the selected salesperson.	25	DRAW_PAID + REG_BONUS_REC
Grand Total Non-Recoverable Amount	The grand total non-recoverable amount (Commission, bonus, other, payee commission and payee bonus) for the selected salesperson.	25	COMM_NREC
Grand Total Amount to Recover	The grand total amount to recover (Commission, bonus, other, payee commission and payee bonus) for the selected salesperson.	25	COMM_DRAW + REG_BONUS_TO_REC
Grand Total Amount To Pay In <Functional Credit Type>	The grand total amount to pay (Commission, bonus, other, payee commission and payee bonus) for the selected salesperson.	25	COMM_PAID + REG_BONUS_PAID + BONUS_PAID + PAYEE_COMM_PAID + PAYEE_BONUS_PAID
Grand Total Amount To Pay In <Salesperson Credit Type>	The grand total amount to pay (Commission, bonus, other, payee commission and payee bonus) for the selected salesperson in the appropriate credit type.	25	?
Other Payment Details - Compensation Plan	The compensation plan that the selected salespersons other payment amount should be added to.	30	NAME
Other Payment Details - Plan Element	The compensation plans plan element that the selected salespersons other payment amount should be added to.	30	NAME
Other Payment Details - Amount To Pay In <Functional Credit Type>	The other payment amount for the selected salespersons compensation plans plan element.	15	AMOUNT
Other Payment Details - Amount To Pay In <Salesperson Credit	The other payment amount for the selected salespersons compensation plans	15	?

Column Title	Description	Value Length	Column Name/Formula
Type>	plan element in the appropriate credit type.		
Other Payment Details - Total Amount To Pay In <Functional Credit Type>	The total of the other payment amounts for all the compensation plans, plan elements for the selected salesperson.	20	Total of the AMOUNT column.
Other Payment Details - Total Amount To Pay In <Salesperson Credit Type>	The total of the other payment amounts for all the compensation plans, plan elements for the selected salesperson in the appropriate credit type.	20	?

Payrun Detail Report



Parameters

Salesperson Name	<input type="text" value="Lisa Douglas"/>	Payrun Name	<input type="text" value="BJan-96"/>
Salesperson Number	<input type="text" value="49"/>	Pay Period	<input type="text" value="Jun-99"/>
Salesperson Type	<input type="text" value="Other"/>	Pay Date	<input type="text" value="15-Jun-1999"/>
Sales Role	<input type="text" value="Contractor"/>	Credit Type	<input type="text" value="Dollar"/>

Run Report

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	Beginnin g Balance	Amount Due	Recovera ble Payment	Non- Recovera ble Payment	Amount To Recove r	Amount To Pay In <Dollar >	Amount To Pay In <Dollar>	Pay Adjustment Comments
Commission	1,000.00	500.00	1,500.00	0.00	0.00	3,000.00	3,000.00	
Bonus	793.10	0.00	0.00		0.00	793.10	793.10	
Other	500.00	0.00				<u>2,000.00</u>	<u>2,000.00</u>	
						0		
Subtotal	2,293.10	500.00	1,500.00	0.00	0.00	5,793.10	5,793.10	
						0		
Payee	0.00	0.00				0.00	0.00	
Commission								
Payee Bonus	0.00	0.00				0.00	0.00	
Grand Total	6,500.10	3,000.00	1,500.00	0.00	0.00	5,793.10	5,793.10	
						0		
Other Payment Details	Compen sation Plan	Plan Element	Amount To Pay In <Dollar>	Amount To Pay In <Dollar>				
	Comp Plan 1	Quota 1	700.00	700.00				
	Comp Plan 1	Quota 2	800.00	800.00				
	Comp Plan 1	Quota 3	250.00	250.00				
	Comp Plan 1	Quota 4	250.00	250.00				
Total			2,000.00	2,000.00				

Related Information:

[Customize](#)

Pending Payment Report

This standard concurrent manager report lists all the people with payment pending and the amounts. The commission pending and bonus pending figures link to the Pending Transaction Report.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names and the extra choice 'All'. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	All	Y	NAME
Sales Role	LOV - All roles available for this salesperson, user should be able to pick "All", which would represent a summary of all of their roles together. This LOV is restricted to the roles applicable to the salesperson and type selected.	All	Y	NAME
Credit Type	LOV - List of all the credit types available for this salesperson if selected with the extra choice 'All'. This LOV is restricted to the appropriate values for the salesperson and sales role selected.	All	Y	NAME
Start Period	LOV - from system. This LOV should be restricted to the periods available for the salesperson name/number entered.	Current Period	Y	PERIOD_NAME
End Period	LOV -from system.. If a start period has been entered the end period LOV should not include periods earlier than that period. This LOV should also be restricted to the periods available for the salesperson name/number entered.	Current Period	Y	PERIOD_NAME

Data

Column Descriptions

The following table describes each column to be included in the Pending Payment Report.

Column Title	Description	Value Length	Column Name/Formula
Pay Period	The required period, LOV from the system.	15	PERIOD_NAME
Salesperson Name	The salesperson name, LOV from the system.	40	NAME
Salesperson Number	The salesperson number, LOV from the system	10	EMPLOYEE_NUMBER
Salesperson Type	The salesperson type, LOV from the system	20	TYPE
Sales Role	The salespersons role(s), LOV from the system.	40	NAME
Credit Type	The credit type, LOV from the system.	20	NAME
Commission Pending	Commission Pending for a salespersons earnings this period. Value obtained from the Salesperson Worksheet.	12	COMM_PEND_PTD
Bonus Pending	Bonus Pending for a salesperson earnings this period. Value obtained from the Salesperson Worksheet.	12	COMM_PEND_PTD

Pending Payment Report



Parameters

Salesperson Name	All	Credit Type	All
Salesperson Number	All	Start Period	Jun-99
Salesperson Type	All	End Period	Aug-99
Sales Role	All		

Run Report

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Pay Period	Salesperson Name	Salesperson Number	Salesperson Type	Sales Role	Credit Type	Commission Pending	Bonus Pending
Jun-99	Bob Whiley	11	Employee	Full Time Agent	USD	12,012	0
Jun-99	Barry Lewis	44	Employee	Full Time Agent	Air Miles	10,123	0
Jun-99	Elaine Manley	46	Employee	Contractor	USD	23,000	0
Jun-99	Howard Sprague	47	Others	Contractor	Air Miles	12,236	0
Jun-99	Lisa Douglas	49	Others	Contractor	Long Distance Min	8,223	0
Jun-99	Pat Murphy	50	Others	Contractor	USD	12,000	0
Jun-99	Delores Jones	45	Others	Full Time Agent	USD	22,000	0
Jun-99	Jerrold Feinberg	48	Others	Contractor	USD	21,843	0

Related Information:

 [Pending Transaction Report](#)
[Customize](#)

Known Where Conditions

Where the COMM_PEND_PTD field in the CN_SRP_PERIOD_QUOTAS view is greater than 0. The SALESREP_ID field in the CN_SALESREPS view is equal to the SALESREP_ID field in the CN_PERIOD_QUOTAS view. The PERIOD_ID field in the CN_ACC_PERIOD_STATUSES_V view is equal to the PERIOD_ID field in the CN_PERIOD_QUOTAS view.

Pending Transaction Report

This standard concurrent manager report lists all transactions that have a pending status and a history of the pending status.

Enter your information for the basic parameters. The example below shows the requirements for basic parameter setup.

You can enter messages that will appear at the bottom of a report. You can export the information from some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Credited Salesperson Name	LOV - All the sales persons' names and the extra choice 'ALL'. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	ALL	Y	NAME
Credited Salesperson Number	LOV - All the salespersons' numbers and the extra choice 'ALL'. Once a value is selected in the salesperson number field the salesperson name should be automatically populated also.	ALL	Y	EMPLOYEE_NUMBER
Credited Salesperson Type	LOV - List of all the salesperson types available for the salesperson (If selected) and the extra choice 'All'. Examples are Employee and Other. This LOV is restricted to the salesperson types applicable to the salesperson and role selected.	All	Y	TYPE
Start Date	No LOV - The calendar feature should be used.		N	CALANDER WIDGET
End Date	No LOV - The calendar feature should be used. This parameter can hold a date no earlier than that entered in the start date parameter field. You still need to be able to enter a date in this parameter if the start date parameter is null.		N	CALANDER WIDGET
Invoice Number	LOV - All the invoice numbers and the extra choice 'ALL'. This LOV should be restricted if an individual salesperson is chosen to only those invoices applicable to that salesperson. If the process date parameters are used this parameters LOV should be restricted further to only the applicable invoice numbers. If the order number parameter has been entered this LOV should be restricted further to valid corresponding invoice numbers.	ALL	Y	INVOICE_NUMBER
Order Number	LOV - All the order numbers and the extra choice 'ALL'. This LOV should be restricted if an individual salesperson is chosen to only those orders applicable to that salesperson. If the process date parameters are used this	ALL	Y	ORDER_NUMBER

	parameters LOV should be restricted further to only the applicable order numbers.			
--	---	--	--	--

Data

Column Descriptions

The following table describes each column to be included in the Pending Transaction Report.

Column Title	Description	Value Length	Column Name/Formula
Processed Date	The Processed Date	9	PROCESSED_DATE
Pay Period	The period the salesperson was paid in.	8	PERIOD_NAME
Salesperson Name	The salesperson name, LOV from the system.	30	NAME
Salesperson Number	The salesperson number, LOV from the system	10	EMPLOYEE_NUMBER
Salesperson Type	The salesperson type, LOV from the system.	15	TYPE
Sales Role	The salespersons role(s), LOV from the system.	30	NAME
Credit Type	The transactions credit type, from the salesperson worksheet.	20	NAME
Invoice Number	The invoice number, from the salesperson worksheet	12	INVOICE_NUMBER
Invoice Date	The invoice date, from the salesperson worksheet	9	INVOICE_DATE
Order Number	The order number, from the salesperson worksheet	12	ORDER_NUMBER
Order Date	The order date, from the salesperson worksheet	9	BOOKED_DATE
Plan Element	The plan element, from the salesperson worksheet	30	NAME
Revenue Class	The revenue class, from the salesperson worksheet	30	NAME
Quantity	The quantity, from the salesperson worksheet	8	QUANTITY
Transaction Amount	The transaction amount, from the salesperson worksheet	12	TRANSACTION_AMOUNT
Commission Amount	The commission amount, from the salesperson worksheet.	12	COMMISSION_AMOUNT
Days Pending	The total number of days pending. Current date minus the processed date.	5	CURRENT_DATE - PROCESSED_DATE

Pending Transaction Report



Parameters

Credited Salesperson Name Start Date Order Number
 Credited Salesperson Number End Date
 Credited Salesperson Type Invoice Number

Run Report

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Processed Date	Pay Period	Salesperson Name	Salesperson Number	Salesperson Type	Sales Role	Credit Type	Invoice Number	Invoice Date	Order Number	Order Date	Plan Element	Revenue Class	Qty
02-Nov-99	Nov-99	Pat Murphy	50	Employee	Contractor	USD	6557	21-Oct-99	7655	21-Oct-99	Consulting	Cons 1	1
03-Nov-99	Nov-99	Jerrold Feinberg	48	Employee	Contractor	Air Miles	8678	28-Oct-99	8536	28-Oct-99	Consulting	Cons 2	1
08-Nov-99	Nov-99	Delores Jones	45	Employee	Contractor	USD	6743	02-Nov-99	3765	02-Nov-99	Consulting	Cons 1	1
09-Nov-99	Nov-99	Bob Wiley	11	Others	Full Time Agent	Air Miles	1232	04-Nov -99	3453	04-Nov -99	Consulting	Cons 3	1
11-Nov-99	Nov-99	Lisa Douglas	49	Others	Contractor	Long Distance Min	7545	05-Nov-99	6587	05-Nov-99	Consulting	Cons 3	1
13-Nov-99	Nov-99	Howard Sprague	47	Others	Contractor	USD	4231	10-Nov-99	3456	10-Nov-99	Consulting	Cons 1	1
14-Nov-99	Nov-99	Elaine Manley	46	Others	Contractor	USD	4324	11-Nov-99	4532	11-Nov-99	Consulting	Cons 3	2
18-Nov-99	Nov-99	Barry Lewis	44	Others	Full Time Agent	USD	2143	15-Nov-99	3454	15-Nov-99	Consulting	Cons 2	2

Related Information:

[Customize](#)

Known Where Conditions

Where the PENDING_STATUS field in the CN_COMMISSION_LINES view is equal to 'Y'. The SALESREP_ID field in the CN_COMMISSION_LINES view is equal to the SALESREP_ID in the CN_SALESREPS view.

Performance Details Report

This report shows details of the Compensation Summary Report and is used primarily by the salesperson and sales manager. It indicates user-defined measures of achievement within revenue class. Users can see both quota and goal achievement.

This report can be accessed through the Compensation Summary and Compensation Trend reports and links further to the Sales Credits report. The report can be run to show current period and interval to date results.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson numbers should be automatically populated also.	The person who has logged in.	Y	NAME
Salesperson Role	LOV - All roles available for this salesperson, user should be able to pick 'All', which would represent a summary of all of their roles together. This LOV is restricted to the roles applicable to the salesperson selected.	All	Y	NAME
Credit Type	LOV - List of all the credit types available for this salesperson. This LOV is restricted to the appropriate values for the salesperson and role selected.		Y	NAME
Reporting Period	LOV - List of all accumulated periods available. The LOV is restricted to the role and salesperson.		Y	?
Currency Type	Functional or salesperson currency.	Default to the salesperson currency.	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'CURRENCY_TYPE'
Compensation Plan	LOV - All of the compensation plans restricted by the information entered in all the other		Y	?

	parameter fields.			
Plan Element	LOV - All of the plan elements restricted by the information entered in the other parameter fields especially the compensation plan parameter field.		Y	?

Column Descriptions

The following table describes each column to be included in the Performance Details Report.

Column Title	Description	Value Length	Column Name/Formula
Summary <Plan Element> Measure Amount	The selected measure amount earned by the salesperson during this period for the stated plan element.	10	?
Summary <Plan Element> Quota Achievement %	The percentage of quota achieved for the stated salesperson during this period for the stated plan element.	10	?
Summary <Plan Element> Goal Achievement %	The percentage of goal achieved for the stated salesperson during this period for the stated plan element.	10	?
Details <Revenue Class> (In <Credit Type> <Measure> Current	The selected measure amount earned by the salesperson during this period for the stated revenue class which has been assigned to the selected plan element.	10	?
Details <Revenue Class> (In <Credit Type>) <Measure> <Interval Name>	The selected measure amount earned by the salesperson during the relevant interval for the stated revenue class which has been assigned to the selected plan element.	10	?
Details <Revenue Class> (In <Credit Type>) Quota Current	The period quota target for the revenue class assigned to the selected plan element for the selected salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Quota <Interval Name>	The relevant interval quota target for the revenue class assigned to the selected plan element for the selected salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Quota Achievement % Current	The percentage of quota achieved for the stated salesperson and revenue class assigned to the selected plan element for the current period.	10	?
Details <Revenue Class> (In <Credit Type>) Quota Achievement % <Interval Name>	The percentage of quota achieved for the stated salesperson and revenue class assigned to the selected plan element for the relevant interval.	10	?

Column Title	Description	Value Length	Column Name/Formula
Details <Revenue Class> (In <Credit Type>) Amount to Reach Quota Current	The amount outstanding required to reach the stated revenue classes quota target set for the current period and for the selected plan element and salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Amount to Reach Quota <Interval Name>	The amount outstanding required to reach the stated revenue classes quota target set for the relevant interval and for the selected plan element and salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Goal Current	The period goal target for the revenue class assigned to the selected plan element for the selected salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Goal <Interval Name>	The relevant interval goal target for the revenue class assigned to the selected plan element for the selected salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Goal Achievement % Current	The percentage of goal achieved for the stated salesperson and revenue class assigned to the selected plan element for the current period.	10	?
Details <Revenue Class> (In <Credit Type>) Goal Achievement % <Interval Name>	The percentage of goal achieved for the stated salesperson and revenue class assigned to the selected plan element for the relevant interval.	10	?
Details <Revenue Class> (In <Credit Type>) Amount to reach Goal Current	The amount outstanding required to reach the stated revenue classes goal target set for the current period and for the selected plan element and salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Amount to reach Goal <Interval Name>	The amount outstanding required to reach the stated revenue classes goal target set for the relevant interval and for the selected plan element and salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Amount Pending Current	The amount pending for the selected salesperson during this period with the stated revenue class assigned to the selected plan element.	10	?
Details <Revenue Class> (In <Credit Type>) Amount Pending <Interval Name>	The amount pending for the selected salesperson during the relevant interval with the stated revenue class assigned to the selected plan element.	10	?

Performance Details Report

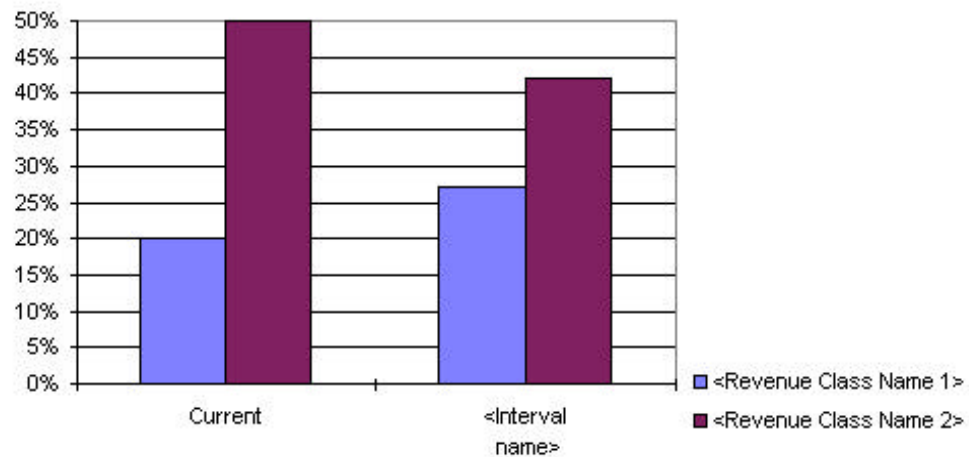


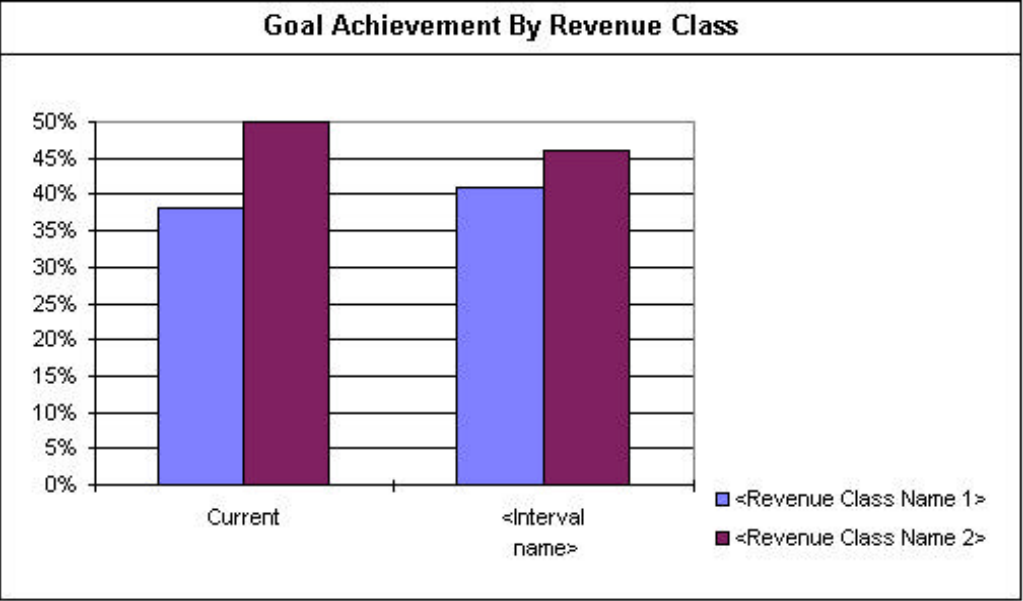
Parameters

Salesperson Name Reporting Period
Salesperson Number Currency Type
Salesperson Type Compensation Plan
Salesperson Role Plan Element
Credit Type

[Run Report](#)[Print](#)[Save to Favorites](#)

Quota Achievement By Revenue Class





SUMMARY (Current Period)	Measure Amount	Quota Achievement %	Goal Achievement %
<Plan Element name 1>	400,000	28%	47%

DETAILS

<Revenue Class Name 1>	(In <Credit type>)	
	Current	<Interval name>
<Measure>	200,000	800,000
Quota	1,000,000	3,000,000
Quota Achievement %	20%	27%
Amount to Reach Quota	800,000	2,200,000
Goal	650,000	1,950,000
Goal Achievement %	38%	41%
Amount to Reach Goal	450,000	1,150,000
Amount Pending	-200,000	200,000

<Revenue Class Name 2>	(In <Credit type>)	
	Current	<Interval name>
<Measure>	200,000	500,000
Quota	400,000	1,200,000
Quota Achievement %	50%	42%
Amount to Reach Quota	200,000	700,000
Goal	400,000	1,100,000
Goal Achievement %	50%	46%
Amount to Reach Goal	200,000	600,000
Amount Pending	100	100

Related Information:

 [Compensation Summary Report](#)

 [Sales Credits Report](#)

 [Compensation Trend Report](#)

[Customize](#)

Performance Details Report (Fiscal View)

This performance report shows details of the Compensation Summary Report and is used primarily by the salesperson and sales manager. It indicates user defined measures of achievement within revenue class. Users can see both quota and goal achievement.

This report can be accessed through the Compensation Summary and Compensation Trend reports and links further to the Sales Credits report. The report can be run to show results of the current period and interval to date as well as a fiscal view. When run in fiscal view, the graph shows only the current period. This report may be combined with the Performance Details report when the report layout is set to 'YTD vs 12 Months'.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson numbers should be automatically populated also.	The person who has logged in.	Y	NAME
Salesperson Role	LOV - All roles available for this salesperson, user should be able to pick 'All', which would represent a summary of all of their roles together. This LOV is restricted to the roles applicable to the salesperson selected.	All	Y	NAME
Credit Type	LOV - List of all the credit types available for this salesperson. This LOV is restricted to the appropriate values for the salesperson and role selected.		Y	NAME
Reporting Period	LOV - List of all accumulated periods available. The LOV is restricted to the role and salesperson.		Y	?
Currency Type	Functional or salesperson currency.	Default to the salesperson currency.	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'CURRENCY_TYPE'
Compensation Plan	LOV - All of the compensation plans restricted		Y	?

	by the information entered in all the other parameter fields.			
Plan Element	LOV - All of the plan elements restricted by the information entered in the other parameter fields especially the compensation plan parameter field.		Y	?

Data

Column Descriptions

The following table describes each column to be included in the Performance Details Report.

Column Title	Description	Value Length	Column Name/Formula
Summary <Plan Element> Measure Amount	The selected measure amount earned by the salesperson during this period for the stated plan element.	10	?
Summary <Plan Element> Quota Achievement %	The percentage of quota achieved for the stated salesperson during this period for the stated plan element.	10	?
Summary <Plan Element> Goal Achievement %	The percentage of goal achieved for the stated salesperson during this period for the stated plan element.	10	?
Details <Revenue Class> (In <Credit Type> <Measure> <Period>	The selected measure amount earned by the salesperson during this period for the stated revenue class which has been assigned to the selected plan element.	10	?
Details <Revenue Class> (In <Credit Type>) Quota <Period>	The period quota target for the revenue class assigned to the selected plan element for the selected salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Quota Achievement % <Period>	The percentage of quota achieved for the stated salesperson and revenue class assigned to the selected plan element for the period.	10	?
Details <Revenue Class> (In <Credit Type>) Amount to Reach Quota <Period>	The amount outstanding required to reach the stated revenue classes quota target set for the period and for the selected plan element and salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Goal <Period>	The period goal target for the revenue class assigned to the selected plan element for the selected salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Goal Achievement % <Period>	The percentage of goal achieved for the stated salesperson and revenue class assigned to the selected plan element for the period.	10	?

Column Title	Description	Value Length	Column Name/Formula
Details <Revenue Class> (In <Credit Type>) Amount to reach Goal <Period>	The amount outstanding required to reach the stated revenue classes goal target set for the period and for the selected plan element and salesperson.	10	?
Details <Revenue Class> (In <Credit Type>) Amount Pending <Period>	The amount pending for the selected salesperson during this period with the stated revenue class assigned to the selected plan element.	10	?

Performance Details Report (Fiscal View)



Parameters

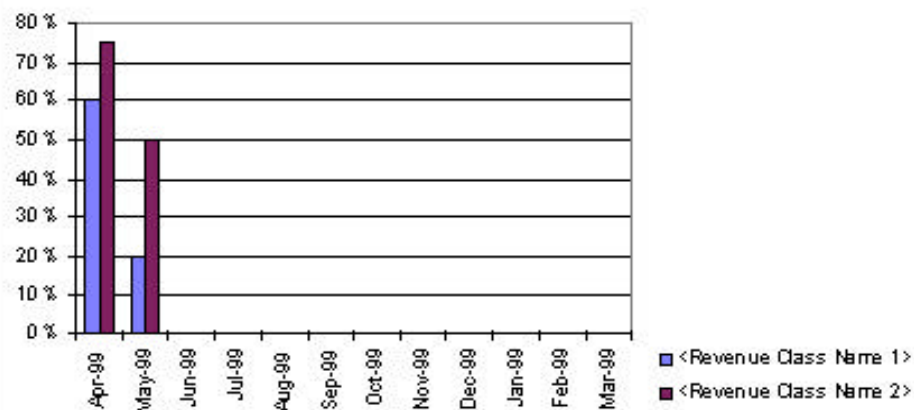
Salesperson Name Reporting Period
Salesperson Number Currency Type
Salesperson Type Compensation Plan
Salesperson Role Plan Element
Credit Type

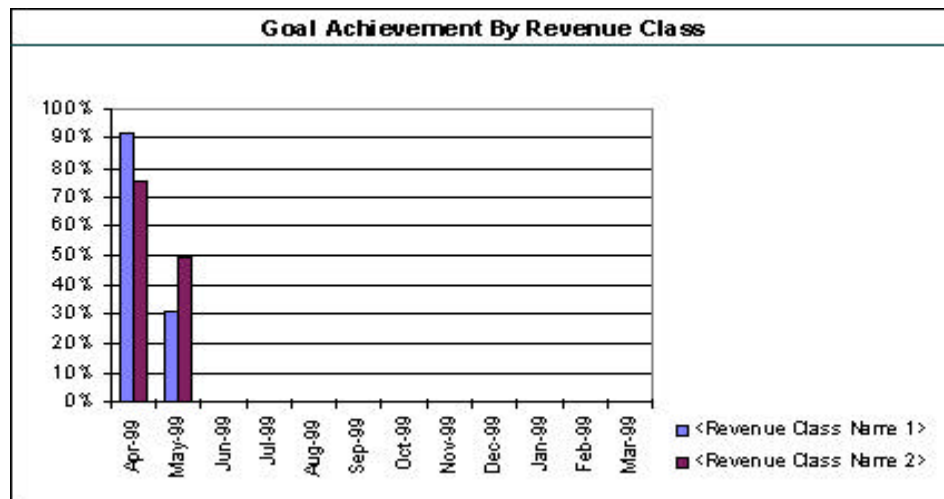
Run Report

Print

Save to Favorites

Quota Achievement By Revenue Class





SUMMARY (Current Period)	Measure Amount	Quota Achievement %	Goal Achievement %
<Plan Element name 1>	400,000	28%	47%

DETAILS

<Revenue Class Name 1>

(In <credit type>)

	Apr-1999	May-1999	Jun-1999	Jul-1999	Aug-1999	Sep-1999	Oct-1999	Nov-1999	Dec-1999	Jan-1999	Feb-1999
<Measure>	600,000	200,000	0	0	0	0	0	0	0	0	0
Quota	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
	00	00	00	00	00	00	00	00	00	00	00
Quota Achievement %	60%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Quota	400,000	800,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
			00	00	00	00	00	00	00	00	00
Goal	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000
Goal Achievement %	92%	31%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Goal	50,000	450,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000	650,000
Amount Pending	400,000	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000
		00	00	00	00	00	00	00	00	00	00

<Revenue Class Name

2>

(In <credit type>)

	Apr-1999	May-1999	Jun-1999	Jul-1999	Aug-1999	Sep-1999	Oct-1999	Nov-1999	Dec-1999	Jan-1999	Feb-1999
<Measure>	300,000	200,000	0	0	0	0	0	0	0	0	0
Quota	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000
Quota Achievement %	75%	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Amount to Reach Quota	100,000	200,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000
Goal	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000
Goal Achievement %											
Amount to Reach Goal	100,000	200,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000
Amount Pending	100,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000

Related Information:

[Customize](#)

 [Compensation Summary Report](#)

 [Sales Credits Report](#)

 [Compensation Trend Report](#)

Sales Credits Report

This performance report shows all sales credits that make up the commission/bonus amounts. It is the main report used by both salespeople and compensation analysts, and sales managers also find this report useful. Columns are user defined and can be sorted and sub-totaled based on user defined criteria.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Reporting Period	LOV - List of all accumulated Periods available.		Y	PERIOD_NAME
Salesperson Name	LOV - All the sales persons' names and the extra choice 'All'. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	All	Y	NAME
Salesperson Type	LOV - List of all the salesperson types available in the selected period. The user should also be able to pick 'All', which would represent a summary of all their salesperson types together. Examples are Employee and Other. This LOV is restricted to the salesperson types applicable to the salesperson and role selected.	All	Y	TYPE
Sales Role	LOV - All roles available for the selected salesperson (if specified) in the selected period. The user should also be able to pick 'All', which would represent a summary of all their roles together.	All	Y	NAME
Credit Type	LOV - List of all the credit types available for this salesperson. This LOV is restricted to the appropriate values for the salesperson and role selected.		Y	NAME
Currency Type	Functional or Salesperson currency	Default to the salesperson currency	Y	SELECT MEANING FROM CN_LOOKUPS WHERE LOOKUP_TYPE = 'CURRENCY_TYPE'
Sort By	LOV - All the fields used in this report stated in the data section.		N	New functionality
Then By	LOV - All the fields used in this report except the one stated in the 'sort by' parameter. If no value is entered in the 'sort by' column then this parameter should be disabled.		N	New functionality
Finally By	LOV - All the fields used in this report except the values entered in the 'sort by' and 'finally by' parameter fields. If no value is entered in the 'then by' column then this parameter should be disabled.		N	New functionality

Data

Column Descriptions

The following table describes each column to be included in the Sales Credits Report.

Column Title	Description	Value Length	Column Name/Formula
Direct Salesperson Name	The direct salespersons name	40	DIRECT_SALESREP_NAME
Direct Salesperson Number	The direct salespersons number	30	DIRECT_SALESREP_NUMBER
Date	The process date for the transaction	11	PROCESSED_DATE
Transaction Type	The transaction type	22	TRX_TYPE
Customer Name	The customer name for the transaction. Drill down to customer details (Ship-to, bill-to)	35	CUSTOMER_NAME (This should drill down)
Order Date	The order date for the transaction.	11	ORDER_DATE
Order Number	The order number for the transaction	15	ORDER_NUMBER
Invoice Date	The invoice Date for the transaction	11	INVOICE_DATE
Invoice Number	The Invoice Number for the transaction	15	INVOICE_NUMBER
Quantity	Quantity for the transaction	6	QUANTITY
Transaction Amount	The transaction amount	15	TRANSACTION_AMOUNT
Currency	The currency for this transaction	15	CURRENCY_CODE
Exchange Rate	The exchange rate for the transaction	10	EXCHANGE_RATE
Functional Amount	The functional amount for the transaction	15	FUNCTIONAL_AMOUNT
Revenue Class	The revenue class name for the transaction	30	REVENUE_CLASS
Sales Credits	The Commissionable Amount for the transaction	20	COMMISSIONABLE_AMOOUNT
Commission/Bonus Amount	The Commission/Bonus Amount for the transaction	20	COMMISSION_AMOUNT

Example One:

Sales Credits Report



Parameters

Reporting Period	<input type="text" value="Jun-1999"/>	Credit Type	<input type="text" value="Dollar"/>	Subtotal By	<input type="text"/>
Salesperson Name	<input type="text" value="All"/>	Currency Type	<input type="text" value="Functional"/>		
Salesperson Number	<input type="text" value="All"/>	Sort By	<input type="text" value="Salesperson N"/>		
Salesperson Type	<input type="text" value="All"/>	Then By	<input type="text"/>		
Sales Role	<input type="text" value="All"/>	Finally By	<input type="text"/>		

Run Report

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Direct Salesperson Name	Direct Salesperson Number	Date	Transaction Type	Customer Name	Order Date	Order Number	Invoice Date	Invoice Number	Quantity	Transaction Amount	Currency	Exchange Rate	Function Amount
Bob Wiley	11	15-Jan-1999	Manual Transaction	<u>Chips Ltd</u>	15-Jan-1999	<u>87899</u>	17-Jan-1999	12314	4	75,000	?		75
Barry Lewis	44	15-Jan-1999	Manual Transaction	<u>IBM</u>	15-Jan-1999	<u>54366</u>	17-Jan-1999	76424	3	15,000	?		15
Delores Smith-Jones	45	15-Jan-1999	Manual Transaction	<u>Chips Ltd</u>	15-Jan-1999	<u>31411</u>	17-Jan-1999	21663	6	25,000	?		25
Elaine Manley	46	15-Jan-1999	Manual Transaction	<u>Chips Ltd</u>	15-Jan-1999	<u>34543</u>	17-Jan-1999	68098	96	78,520	?		78
Howard Sprague	47	15-Jan-1999	Manual Transaction	<u>ICL</u>	15-Jan-1999	<u>43531</u>	17-Jan-1999	32901	4	45,000	?		45
Jerrold Feinberg	48	15-Jan-1999	Manual Transaction	<u>Chips Ltd</u>	15-Jan-1999	<u>56767</u>	17-Jan-1999	60925	4	150,000	?		150
Lisa Douglas	49	15-Jan-1999	Manual Transaction	<u>IBM</u>	15-Jan-1999	<u>88142</u>	17-Jan-1999	24763	4	45,000	?		45
Pat Murphy	50	15-Jan-1999	Manual Transaction	<u>Chips Ltd</u>	15-Jan-1999	<u>53784</u>	17-Jan-1999	73189	4	3,000	?		3
Grand Total										<u>436,520</u>			<u>436</u>

Related Information:






 [Compensation Summary Report](#)
 [Compensation Details Report](#)

 [Blind Ranking Report](#)
 [Compensation Trend Report](#)

[Customize](#)
 [Order Details](#)

Example Two:

Sales Credits Report



Parameters

Reporting Period	<input type="text" value="Jun-1999"/>	Credit Type	<input type="text" value="Dollar"/>	Subtotal By	<input type="text" value="Customer Name"/>
Salesperson Name	<input type="text" value="All"/>	Currency Type	<input type="text" value="Functional"/>		
Salesperson Number	<input type="text" value="All"/>	Sort By	<input type="text" value="Customer Name"/>		
Salesperson Type	<input type="text" value="All"/>	Then By	<input type="text" value="Order Date"/>		
Sales Role	<input type="text" value="All"/>	Finally By	<input type="text"/>		

Direct Salesperson Name	Direct Salesperson Number	Date	Transaction Type	Ship to Customer Name	Bill to Customer Name	Order Date	Order Number	Invoice Date	Invoice Number	Quantity	Transaction Amount	Currency	Excha Rate
Bob Wiley	11	15-Jan-99	Manual Transaction	Chips Ltd	Chips Ltd	15-Jan-99	<u>87899</u>	17-Jan-99	12314	4	75,000	?	
Delores Smith-Jones	48	15-Jan-99	Manual Transaction	Chips Ltd	Chip Set Ltd	15-Jan-99	<u>56767</u>	17-Jan-99	60925	4	150,000	?	
Elaine Manley	50	15-Jan-99	Manual Transaction	Chips Ltd	Chip Set Ltd	15-Jan-99	<u>53784</u>	17-Jan-99	73189	4	3,000	?	
Jerrold Feinberg	45	15-Jan-99	Manual Transaction	Chips Ltd	Chips Ltd	16-Jan-99	<u>31411</u>	17-Jan-99	21663	6	25,000	?	
Pat Murphy	46	15-Jan-99	Manual Transaction	Chips Ltd	Chips Ltd	16-Jan-99	<u>34543</u>	17-Jan-99	68098	96	78,520	?	
Subtotal By Customer Name											331,520		
Lisa Douglas	49	15-Jan-99	Manual Transaction	IBM	IBM	16-Jan-99	<u>88142</u>	17-Jan-99	24763	4	45,000	?	
Barry Lewis	44	15-Jan-99	Manual Transaction	IBM	IBM	15-Jan-99	<u>54366</u>	17-Jan-99	76424	3	15,000	?	
Subtotal By Customer Name											60,000		
Howard Sprague	47	15-Jan-99	Manual Transaction	ICL	ICL	15-Jan-99	<u>43531</u>	17-Jan-99	32901	4	45,000	?	
Grand Total											436,520		

Related Information:



[Compensation Summary Report](#)



[Blind Ranking Report](#)



[Order Details](#)



[Compensation Details Report](#)



[Compensation Trend Report](#)

[Customize](#)

Operational Reports

Salespeople Hierarchy Report

This report displays any salespeople hierarchy within an organization at any moment in time as specified by the user. The compensation group name fields link to the Compensation Group Hierarchy Report. The salesperson(s) fields link to the Compensation Summary Report.

Users can enter messages that will appear at the bottom of a report.

The search criteria item is displayed in a different color in the report results so that it stands out from the rest of the search items.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names. If not entered the salesperson number must be entered. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.		Y	NAME
Salesperson Number	LOV - All the salespersons' numbers. If not entered the salesperson name must be entered. Once a value is selected in the salesperson number field the salesperson name should be automatically populated also		Y	EMPLOYEE_NUMBER
Compensation Group Name	LOV - All the compensation group names and the extra choice 'ALL'. - The LOV should be restricted to the Compensation Groups assigned to the salesperson indicated by the salesperson parameters.	ALL	Y	NAME
Effective Date	No LOV - The calendar feature should be used.	Current Date	Y	CALANDER WIDGET

Data

Column Descriptions

The following table describes each column to be included in the Salespeople Hierarchy Report.

Column Title	Description	Value Length	Column Name/Formula
Compensation Group Name	The salespersons compensation group.	30	NAME
Manager Name /Number/Type	The Manager name concatenated with the salesperson number and resource type. LOV from the system..	50	NAME EMPLOYEE_NUMBER TYPE
Salesperson Name/Number/Type	The salesperson name concatenated with the salesperson number and resource type. LOV from the system.	50	NAME EMPLOYEE_NUMBER TYPE
Sales Role	The role assigned to the salesperson in the selected analyst group.	20	NAME
Effective Dates	The salesperson effective date from field concatenated with the effective date to field.	30	START_DATE_ACTIVE END_DATE_ACTIVE

Example One :

Salespeople Hierarchy Report



Parameters

Salesperson Name Salesperson Number Compensation Group Name Effective Date

Run Report

Print

Save to Favorites

Compensation Group Name	Manager Name/Number/Type	Salesperson Name/Number/Type	Sales Role	Effective Dates
Oregon	Thomas Selleck, 25, Employee		Regional Manager	01-Jan-1999 - 28-Feb-2000
		Lisa Douglas, 2500, Employee	Salesrep 1	01-Jan-1999 - 28-Feb-2000
		Howard Sprague, 15000, Employee	Salesrep 2	01-Jan-1999 - 28-Feb-2000
		Delores Smith-Jones, 18085, Employee	Salesrep 3	01-Jan-1999 - 28-Feb-2000
Washington	Thomas Selleck, 25, Employee		Regional Manager	01-Jan-1999 - 28-Feb-2000
		Barry Lewis, 7500, Employee	Salesrep 1	01-Jan-1999 - 28-Feb-2000
		Suzanne Green, 10007, Employee	Salesrep 2	01-Jan-1999 - 28-Feb-2000
		Pat Murphy, 5845, Contractor	Salesrep 3	01-Jan-1999 - 28-Feb-2000

Timothy Cleary, 6950, Employee

Salesrep 4

01-Jan-1999 - 28-Feb-2000

Related Information:

 [Compensation Group Hierarchy Report](#)

 [Compensation Summary Report](#)

[Customize](#)

Example Two :

Salespeople Hierarchy Report



Parameters

Salesperson Name

Salesperson Number

Compensation Group Name

Effective Date

Run Report

Print

Save to Favorites

Compensation Group Name	Manager Name/Number/Type	Salesperson Name/Number/Type	Sales Role	Effective Dates
<u>Oregon</u>	<u>Thomas Selleck, 25, Employee</u>		Regional Manager	01-Jan-1999 - 28-Feb-2000
		Lisa Douglas, 2500, Employee	Salesrep 1	01-Jan-1999 - 28-Feb-2000
		<u>Howard Sprague, 15000, Employee</u>	Salesrep 2	01-Jan-1999 - 28-Feb-2000
		<u>Delores Smith-Jones, 18085, Employee</u>	Salesrep 3	01-Jan-1999 - 28-Feb-2000

Related Information:

 [Compensation Group Hierarchy Report](#)

 [Compensation Summary Report](#)

[Customize](#)

Exception Reports

Payment Hold Report

This is a standard concurrent manager report and will be most useful for the compensation analyst or superuser.

You can enter messages that will appear at the bottom of a report. You can export the information for some fields of this report by using the 'export to excel function'.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Salesperson Name	LOV - All the sales persons' names and the extra choice 'All'. Once a value is selected in the salesperson name field the salesperson number should be automatically populated also.	All	Y	NAME
Hold Reason	No LOV		N	

Data

Column Descriptions

The following table describes each column to be included in the Payment Hold Report.

Column Title	Description	Value Length	Column Name/Formula
Salesperson Name	The salesperson name(s) Salesperson Worksheet	40	NAME
Salesperson Number	The salesperson number(s) Salesperson Worksheet	10	EMPLOYEE_NUMBER
Hold Reason	The reason that the transaction has been put on hold.	80	HOLD_REASON

Payment Hold Report



Parameters

Salesperson Name

Salesperson Number

Hold Reason

Run Report

Salesperson Name	Salesperson Number	Hold Reason
Bob Whiley	11	Holding for non-performance
Barry Lewis	44	Terminated employee - other
Delores Smith-Jones	45	Pending further investigation
Elaine Manley	46	Pending further investigation
Howard Sprague	47	Inter-company pending correction
Jerrold Fienberg	48	Holding for non-performance
Lisa Douglas	49	Pending further investigation
Pat Murphy	50	Holding for non-performance

Related Information:

[Customize](#)

Known Where Conditions

Where the HOLD_PAYMENT field in the CN_SALESREP_DETAILS view is set to 'Y'. The SALESREP_ID field in the CN_SALESREP_DETAILS view is equal to the SALESREP_ID field in the CN_SALESREPS view.

Classification Rules Report

This report lists all classification rules and will be useful for a system administrator or superuser. You can export the information for some fields of this report by using the 'export to excel function'.

Query results show parent rules/children rules of the search criteria (rule name) all the way to the top/bottom of the hierarchy (Direct path). The search criteria phrase is displayed in a different color in the report results so that it stands out from the rest of the rule names. The Revenue class and expression for a selected rule name are displayed in a different color.

Parameters

Prompt	Choices Available	Default Value	Mandatory	LOV - Column Name/Formula
Rule Name	LOV - All the rule names and the extra choice 'All'.	All	Y	NAME
Effective Date	No LOV - The calendar feature should be used.	Current Date	Y	CALENDAR WIL
Ruleset Name	LOV - All the rule names and the extra choice 'All'.	All	Y	

Data

Column Descriptions

The following table describes each column to be included in the Classification Rules Report.

Column Title	Description	Value Length	Column Name/Formula
Rule Name	Display the classification rule name. Sort by parent rule name then alphabetically by rule name.	20	NAME
Revenue Class	Display the revenue class name assigned to the classification rule.	20	NAME
Expression	Display the expression that is used to classify the individual rule.	70	EXPRESSION?

Example One:

Classification Rules Report



Parameters

Rule Name

Effective Date

Run Report

Rule Name	Revenue Class	Expression
All	All	When status = Y
Hardware	Hardware	When package_type = HW
Services	Services	When package_type = SV
Consulting	Consulting	When product_code = CONSULTING
Support	Support	When product_code = SUPPORT and to ORACLE
Training	Training	When product_code = TRAINING

Related Information:

[Custom](#)

Example Two:

Classification Rules Report



Parameters

Rule Name

Effective Date

[Run Report](#)

Rule Name	Revenue Class	Expression
All	All	When status = Y
Services	Services	When package_type = SV
Consulting	Consulting	When product_code = CONSULTING
Support	Support	When product_code = SUPPORT and to ORACLE
Training	Training	When product_code = TRAINING

Related Information:

[Custom](#)