

THR70

SAP Commissions Academy

**PARTICIPANT HANDBOOK
INSTRUCTOR-LED TRAINING**

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

Example text

Window title

Example text

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

UNIT 1

Getting Started with SAP Commissions

Lesson 1

Getting Started with SAP Commissions

3

Lesson 2

SAP Commissions Architecture

5

Lesson 3

The Sales Performance Home Page

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Exercise 1: Exercise: Add a User and Role in Sales Performance Home

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Lesson 4

The SAP Commissions User Interface

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UNIT OBJECTIVES

- Name the features and functions of SAP Commissions
- Describe the incentive compensation process
- Provide an overview of the SAP Commissions architecture
- Identify the components of the Sales Performance Home Page
- Navigate the user interface
- Name the key workspaces in SAP Commissions
- Set user preferences

Getting Started with SAP Commissions



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Name the features and functions of SAP Commissions
- Describe the incentive compensation process

Features and Functions of SAP Commissions

SAP Commissions is a cloud based, stand-alone sales performance management solution. Using a no-code user interface, your organization's compensation team can create scalable plans and rules to automate the incentive compensation process from sales order to payment for your sales force.

SAP Commissions has two general users. The *Administrator* is a business user that can create and manage compensation plans and rules; update payee quotas, territories and rates; run compensation calculations and review results; design end-user dashboards; distribute and track plan documents; and model future incentive payouts.

A *Payee* is the recipient of the payments generated by SAP Commissions. A typical payee may be a sales representative, account executive, sales manager, or any other entity who is compensated based on performance. A Payee can view dashboards, accept distributed compensation plans, and raise disputes and inquiries.

Administrators can:

- Create and manage compensation plans and rules
- Update payee quotas, territories, and rates
- Run compensation calculations and review results
- Design end-user dashboards to be displayed to sales representatives and sales managers
- Send out plan documents and design corresponding approval process
- Model changes in the incentives payouts for a given change in a compensation plan

Payees can:

- View Dashboards
- Accept compensation plans
- Raise compensation disputes

The Incentive Compensation Process

To describe the incentive compensation process, let's start with what compensation means. Compensation is defined as the total amount of monetary payment provided to an employee, for work performed. SAP Commissions uses compensation plans to calculate and compensate each payee based on their performance measurements. This is called Variable Incentive Compensation. The components of compensation are detailed in a compensation plan. This plan contains a set of rules that specify how to compensate each payee.

Bikes in Motion is a fictional company that sells different type of bikes, cycling apparel and gear, and replacement parts. It sells to sporting goods stores, general retailers, and specialty shops globally through a team of Sales Representatives. Each Sales Rep uses a Customer Relationship Manager (CRM) such as SAP Cloud for Customer to enter and track their opportunities. Once an opportunity is won and the sale is final, it moves into Commissions and becomes a Transaction.

The Compensation Administrator manages the compensation process in the SAP Commissions user interface by managing Compensation Plans, Rules, and other compensation elements to ensure each Sales Rep is compensated accurately for their sales.

As compensation is calculated, the Sales Rep can track their progress by viewing their results in a Dashboard.

At the end of the compensation period, the payments are sent to a payroll or accounts payable team for processing.



Animation: Overview of the Sales Compensation Process

For more information on *Overview of the Sales Compensation Process*, please view the animation in the lesson *Getting Started with SAP Commissions* in your online course.



LESSON SUMMARY

You should now be able to:

- Name the features and functions of SAP Commissions
- Describe the incentive compensation process

Unit 1

Lesson 2

SAP Commissions Architecture



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Provide an overview of the SAP Commissions architecture

SAP Commissions Architecture



Animation: Technical Overview

For more information on *Technical Overview*, please view the animation in the lesson *SAP Commissions Architecture* in your online course.

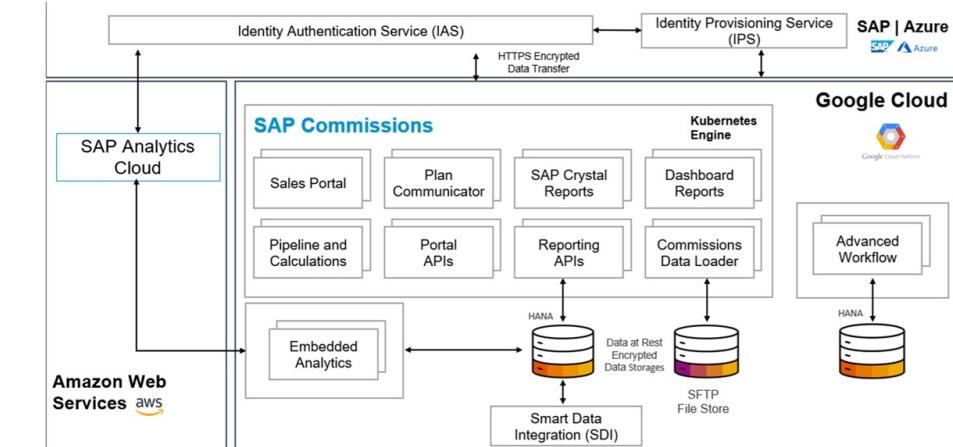


Figure 1: SAP Commissions Architecture

Identity Authorization Service (IAS) and **Identity Provisioning Service (IPS)** allow you to configure seamless integration between SAP Commissions, other SPM applications such as embedded analytics, and third party applications. IAS and IPS run on Microsoft Azure

- IAS:** supports user and group management and allows configurations for single sign-on.
- IPS:** provisions users from IAS to the applications or service providers, and vice-versa from applications to Identity Authentication. This provides a unified customer experience across SPM products and provides a single point of entry for user onboarding and access control.

SAP Commissions and its associated applications, including Plan Communicator, the Pipeline, and Commissions Data Loader, are hosted on a Google Cloud platform and built on a microservices architecture that leverages the Kubernetes (K8s) platform. K8s architecture is

an open-source container orchestration system for scaling and managing containerized applications.

All data related to SAP Commissions, including staging and production data, reporting, and analytics, reside in an SAP HANA database. Access to the HANA database tables and procedures is possible using the SAP WebIDE interface.

Finally, embedded analytics for SAP Commissions is an SAP Analytics Cloud application running on Amazon Web Services (AWS).



LESSON SUMMARY

You should now be able to:

- Provide an overview of the SAP Commissions architecture

Unit 1

Lesson 3

The Sales Performance Home Page



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify the components of the Sales Performance Home Page

The Sales Performance Home Page

When you first log in to SAP Commissions, you are taken to the Sales Performance Home page. This page is the portal to all Sales Performance Management applications, including SAP Commissions, Embedded Analytics, Territory & Quota, and more. On this page, you manage user permissions and roles, general settings such as password policies and branding, view process logs, and configure e-mail notifications.

The Sales Performance home page workspaces are:

- Processing Logs:** provide log files for pipelines and data integration jobs.
- Security Logs:** provide views failed logins, password change activity and more.
- Purge Logs:** display the details of stage table purges.
- User Administration:** allows the configuration of User roles and permissions.
- Global Settings:** allows the configuration of password policies, e-mail settings, Authentication settings, Purge Logs settings, and Branding Settings.
- Process Configuration:** allows for the configuration of email notifications and associated templates.
- Maintenance:** executes maintenance tasks



Figure 2: Sales Performance Home Page



Animation

For more information on this topic please view the animation in the lesson *The Sales Performance Home Page* in your online course.

Log Files

From the Sales Performance Home page, the administrator can view three types of log files: processing logs, security logs, and purge logs.

Processing Logs allow users to view log files for Pipelines and data integration jobs. This includes:

- Pipeline Logs
- CDL Data Files
- CDL Errors/Alerts
- Session Logs
- Source Files
- Target Files

Security Logs allow users to view failed logins, password change activity, and more.

Purge Logs allow users to view Purge exercises and who initiated the purge.

Global Settings

The Global Settings page allows the administrator to manage settings for the SPM suite. This includes enabling features such as Dashboards, Disputes, and Documents, managing e-mail communications, setting authentication options and managing branding.

General Settings

Some commonly used General Settings include:

Disable site-wide system-generated e-mails for end users: enabling this preference will stop all system generated e-mails from delivery to end users.

Send copy (cc) of all system generated e-mails: Useful for testing and development, you can enter a list of users that receive system generated emails, separating addresses with a comma. Note that for security reasons, password reset notification emails will not be copied to the administrator even when this option is configured.

Authentication Settings

Authentication settings manage password reset options and other settings related to password policy. Some commonly used settings include:

Allow Users to Change Password: Select Yes to allow users to change their login password. Keep in mind that in most cases, SAP Commissions uses Single Sign-On (SSO), so users will not be resetting their password in this system. As a result, the default is No.

Require Authentication for Proxy Log-in: Selecting Yes forces users to re-authenticate when they log in as a proxy user. The default is Yes.

Account Lockout Threshold: This option specifies the number of failed log in attempts that are allowed before the account is locked. For example, if the option is set to 3, the account is locked if a user enters wrong credentials for three times consecutively.

Data Protection Policy

Many countries, international treaties, and other government organizations have implemented laws that cover user data privacy. One very well known example is the Global Data Protection Regulation (GDPR) set by the European Union. Under these laws, companies are required to purge personal data, provide personal data on request, and retain information regarding the identifiable nature of personal data. The Administrator can complete this task in the Data Protection Policy section.

Retention Period for Purge Jobs: This specifies how old data needs to be before it can be considered for purging/deletion.

Purge frequency in days: This option determines when logs are purged. A zero value in this field results in no purge.

Purge now: Performs an immediate purge.

User Administration

The User Administration workspace allows the configuration and management of user data, personal data, titles, groups, roles, and permissions.

Sales Performance Home Users and Roles

Access to Sales Performance Home and the applications in the SPM suite are managed via users and roles. A number of default roles exist in the system, such as Participant, Administrator, Approver, and Global.

A default role called *PortalAdmin* provides access to all tasks and applications. This role can be assigned to any new accounts that require super user access to the system.

You can also create custom roles and assign individual users, groups, and titles to the role.

When a participant is created in SAP Commissions, they are automatically added to the Participants role. This allows every payee to log in to Sales Performance home to view dashboards and documents, and to submit and view disputes.

Managing User Information

By default, all groups and titles appear in the list of users. However, individual users do not. To assign permissions or perform other actions on an individual user, you can search for a user, or add the user as an *internal user*. If you add a user as an internal user, a link to their record is displayed until it is removed.

Once you have found a user, you can manage their user data, assign a proxy, or assign the user to a role.

Through the Manage User Data tab in the User Administration workspace, Administrators can unlock a participant's profile or block a participant from being purged.

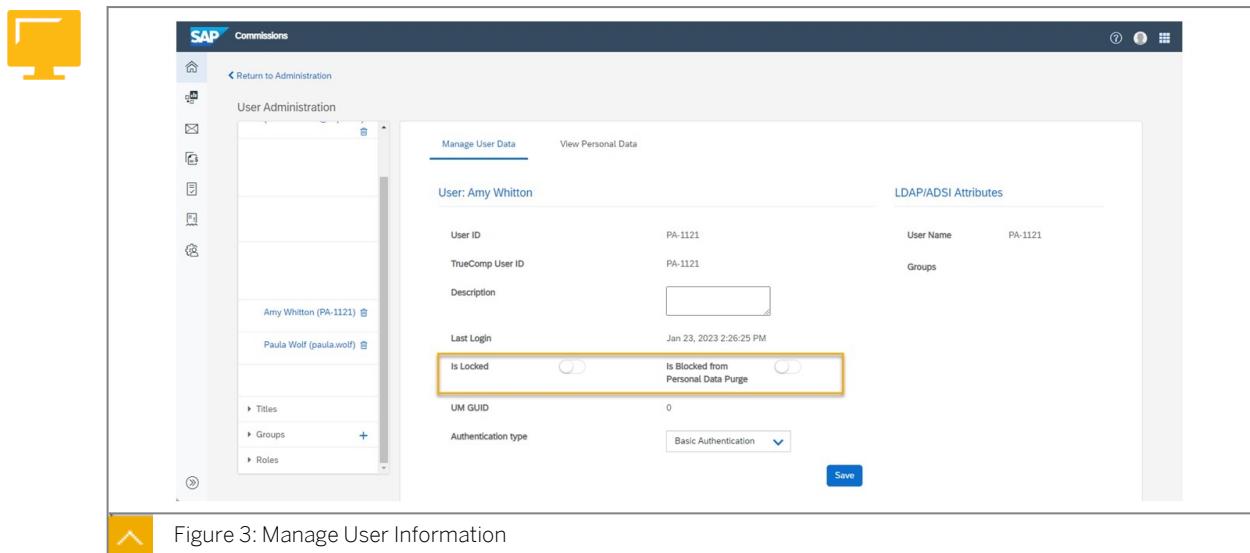
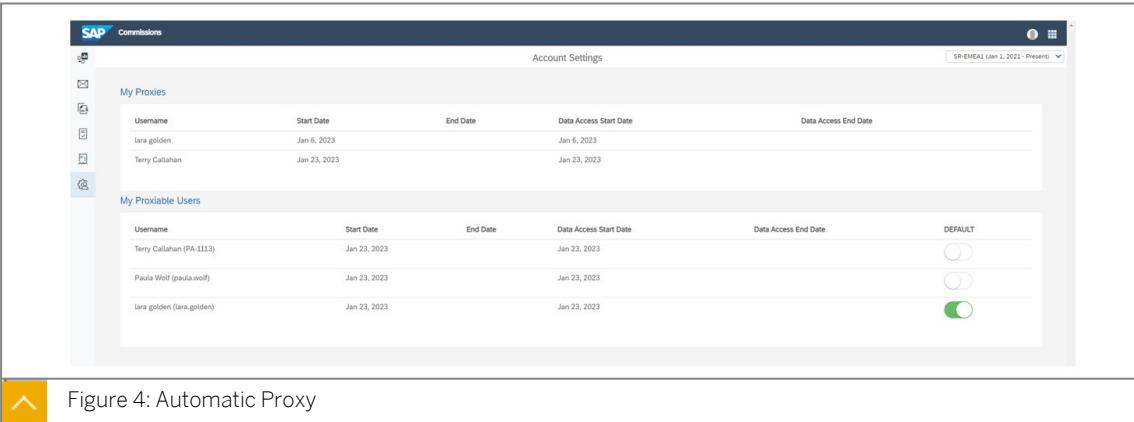


Figure 3: Manage User Information

Automatic Proxy

For security reasons, proxies can only be assigned to a user by an administrator. However, once a proxy has been assigned, a user can designate an automatic proxy in the Account Settings page.



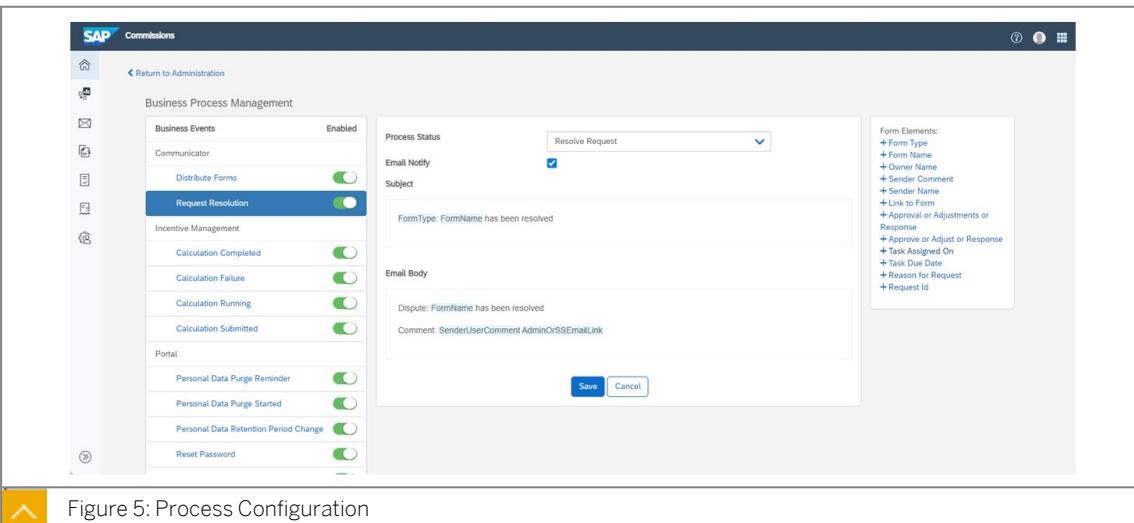
The screenshot shows the SAP Commissions interface under 'Account Settings'. It displays two sections: 'My Proxies' and 'My Proxyable Users'. In 'My Proxies', there are two entries: 'lara.golden' (Start Date: Jan 6, 2023, End Date: Jan 6, 2023) and 'Terry Callahan' (Start Date: Jan 23, 2023, End Date: Jan 23, 2023). In 'My Proxyable Users', there are three entries: 'Terry Callahan (PA-1113)' (Start Date: Jan 23, 2023, End Date: Jan 23, 2023), 'Paula Wolf (paula.wolf)' (Start Date: Jan 23, 2023, End Date: Jan 23, 2023), and 'lara.golden (lara.golden)' (Start Date: Jan 23, 2023, End Date: Jan 23, 2023). A green switch icon is next to the last entry.

 Figure 4: Automatic Proxy

This feature enables participants to automatically proxy as a different participant or agency to see the desired dashboards and reports. The participant does not need to be assigned to a position.

Process Configuration

The Process configuration workspace allows Administrators to customize the emails used for notifications such as password resets or new accounts. Any communication can be disabled by moving the slider to the left.



The screenshot shows the SAP Commissions interface under 'Business Process Management'. On the left, a sidebar lists various business events with toggle switches: Communicator (Enabled), Distribute Forms (Enabled), Request Resolution (Enabled), Incentive Management (Calculation Completed, Calculation Failure, Calculation Running, Calculation Submitted), Portal (Personal Data Purge Reminder, Personal Data Purge Started, Personal Data Retention Period Change, Reset Password), and others. The 'Request Resolution' section is highlighted. The main panel shows 'Process Status' set to 'Resolve Request', 'Email Notify' checked, and 'Subject' set to 'FormType: FormName has been resolved'. The 'Email Body' section contains 'Dispute: FormName has been resolved' and 'Comment: SenderUserComment AdminOrSEmailLink'. A list of 'Form Elements' is shown on the right, each preceded by a plus sign: + Form Type, + Form Name, + Owner Name, + Sender Name, + Sender Name, + Approve or Adjust or Response, + Approve or Adjust or Response, + Task Assigned On, + Task Due Date, + Reason for Request, and + Request Id. At the bottom are 'Save' and 'Cancel' buttons.

 Figure 5: Process Configuration

Unit 1

Exercise 1

Exercise: Add a User and Role in Sales Performance Home



Simulation: Create an SPM User and Role

For more information on *Create an SPM User and Role*, please view the simulation in the lesson *The Sales Performance Home Page* in your online course.

1. Log in to Sales Performance Home and open *User Administration*.
2. Add a role called *Proxy Manager*.
3. Add a new admin user and assign the user to the Plan Approvals role.
4. Enter the following information for the new user:
 - User ID: PA-1001
 - First name: Pete
 - Last name: Proxy
 - Email: pete@bikesinmotion.com (optionally, you can use your own email)
 - Role: Proxy Manager

The screenshot shows the 'Add Admin User' dialog box. It contains fields for User ID, First Name, Last Name, E-mail, and Role. The User ID is PA-1001, First Name is Pete, Last Name is Proxy, E-mail is pete@bikesinmotion.com, and the Role is set to 'Proxy Manager'. At the bottom right are 'Add' and 'Cancel' buttons.

Add Admin User	
User ID	PA-1001
First Name	Pete
Last Name	Proxy
E-mail	pete@bikesinmotion.com
Role	Proxy Manager

5. Select *Add*.

Unit 1

Solution 1

Exercise: Add a User and Role in Sales Performance Home



Simulation: Create an SPM User and Role

For more information on *Create an SPM User and Role*, please view the simulation in the lesson *The Sales Performance Home Page* in your online course.

1. Log in to Sales Performance Home and open *User Administration*.
 - a) Open the URL provided by the trainer and enter your user name and password.
 - b) Select the *User Administration*.

The screenshot shows the SAP Commissions interface. On the left, there is a sidebar with icons for Processing Logs, Security Logs, Purge Logs, Global Settings, Process Configuration, Maintenance, and Territory and Quota. The 'User Administration' option is highlighted with a yellow box. The main area has three columns: 'Processing Logs', 'Security Logs', and 'Purge Logs'. Below these columns are sections for 'Global Settings', 'Process Configuration', and 'Territory and Quota'.

2. Add a role called *Proxy Manager*.
 - a) Expand Roles - Callidus Portal.
 - b) Select the Add Role icon.

The screenshot shows the 'User Administration' screen. At the top, it says 'User Administration' and lists a user 'lara golden (lara.golden)'. Below this are sections for 'Titles', 'Groups', and 'Roles'. The 'Roles' section is expanded, showing a list with 'Callidus Portal' and 'Administrator'. To the right of 'Callidus Portal' is a blue square button with a white plus sign, which is highlighted with a yellow box. There are also delete icons next to each role entry.

- c) Name the role *Proxy Manager* and select *Add*.
- d) In the *Permissions* section, select the *Add* button.

- e) In the dialog box, set the type to *General* and use the slider to enable *Manage Proxy Relations*.

Figure 6: Manage Proxy Relations

- f) Select Save.

3. Add a new admin user and assign the user to the Plan Approvals role.

- a) Scroll to the top of the list of users and select *Add Admin User*.

4. Enter the following information for the new user:

- User ID: PA-1001
- First name: Pete
- Last name: Proxy
- Email: pete@bikesinmotion.com (optionally, you can use your own email)
- Role: Proxy Manager

5. Select *Add*.



LESSON SUMMARY

You should now be able to:

- Identify the components of the Sales Performance Home Page

Unit 1

Lesson 4

The SAP Commissions User Interface



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Navigate the user interface
- Name the key workspaces in SAP Commissions
- Set user preferences

Navigation

SAP Commissions is a web-based application that is accessed from a web browser. Once you receive access, you can perform the following login instructions.

To Login:

- Click on the SAP Commissions URL link located in your system-generated email.
- Enter the provided Username and Password from the e-mail. For security measures, it is recommended that you change the password after the initial login.
- Click Commissions from the Apps icon.

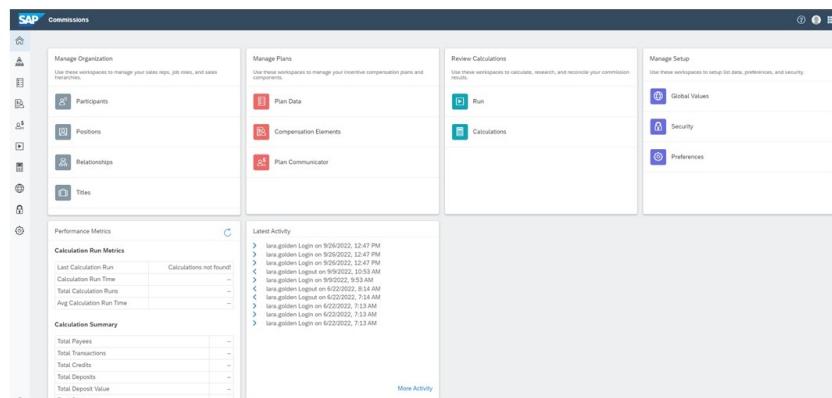


Figure 7: SAP Commissions Home Page



Animation

For more information on this topic please view the animation in the lesson *The SAP Commissions User Interface* in your online course.

This is the SAP Commissions Home Page. Here, you can access different workspaces, as well as Performance Metrics data and Latest Activity.

The tiles on the home page are:

Manage Organization contains workspaces that you use to manage your sales reps, job roles, and sales hierarchies.

Manage Plans is where you'll manage your plans, rules, and classification hierarchies.

Review Calculations contains the workspaces that you'll use to run calculations and review calculation results.

Manage Setup contains the workspaces you'll use to get started setting up your system, including list data, system preferences, and security settings.

Performance Metrics details your Calculation Runs Metrics and Calculation Summary data

Latest Activity details the latest activity in SAP Commissions, such as user logins.

SAP Commissions Workspaces



The screenshot shows the SAP Commissions home page with four main sections: Manage Organization, Manage Plans, Review Calculations, and Manage Setup. Each section has a title, a brief description, and a list of workspaces. The Manage Organization section includes Participants, Positions, Relationships, and Titles. The Manage Plans section includes Plan Data, Compensation Elements, and Plan Communicator. The Review Calculations section includes Run and Calculations. The Manage Setup section includes Global Values, Security, and Preferences. A sidebar on the left provides navigation links.

Figure 8: Key Workspaces

Click on any icon to learn about key workspaces.



Animation: Key Workspaces

For more information on *Key Workspaces*, please view the animation in the lesson *The SAP Commissions User Interface* in your online course.

Alternately, all workspaces can also be accessed using the navigator on the left side.

SAP Commissions displays records in the user interface through a series of Workspaces.

Organization Data



The screenshot shows the Manage Organization workspace with four categories: Participants, Positions, Relationships, and Titles. The Participants, Positions, and Titles categories are highlighted with yellow rounded rectangles.

Participants: A *Participant* is the person or entity that is compensated in a plan. While generally a participant is an individual, this can also be a team or group. Participants can be internal or external to the organization.

Positions: The *Position* contains information about the unique job that is being compensated.

Titles: *Titles* group similar positions across the organization, usually related to job functions.

Plans



Plan Data - Plans Wizard: Use the *Plans Wizard* workspace to create, edit, and copy plans, and to add or remove rules from plans. You can also create rules dynamically in the *Plans Wizard* workspace.

Rules Wizard: Use the *Rules Wizard* to create, modify, copy, and delete rules.

Compensation Elements: *Compensation Elements* are reusable objects that contain an expression or value that can be used in one or more compensation rules.



Global Values

Global Values are used throughout SAP Commissions to allow manual settings of specific plan, rules, elements, and values data types.



Manage Setup

Use these workspaces to setup list data, preferences, and security.

- Global Values
- Security
- Preferences

Calendar: Calendars are used to structure the fiscal pay periods.

Credit Types: Credit Types are labels used to identify types of credits. They are used to populate the output of a credit rule.

Event Types: Event Types are labels used to identify types of transactions. They define the type of sales activity a transaction represents, such as booking, invoicing, billing, and shipping.



Manage Setup

Use these workspaces to setup list data, preferences, and security.

- Global Values
- Calendars
- Event Calendars
- Credit Types
- Earning Codes
- Earning Groups
- Event Types

Preferences

Customization: The *Customizations* workspace is used to customize the SAP Commissions user interface. In this workspace, new fields may be added, and names of existing fields and workspaces may be customized.

System Preferences: System Preferences allow the administrator to apply system-wide settings such as pipeline settings, locales and communications. Unlike the User Preferences settings, System Preferences affect all users.

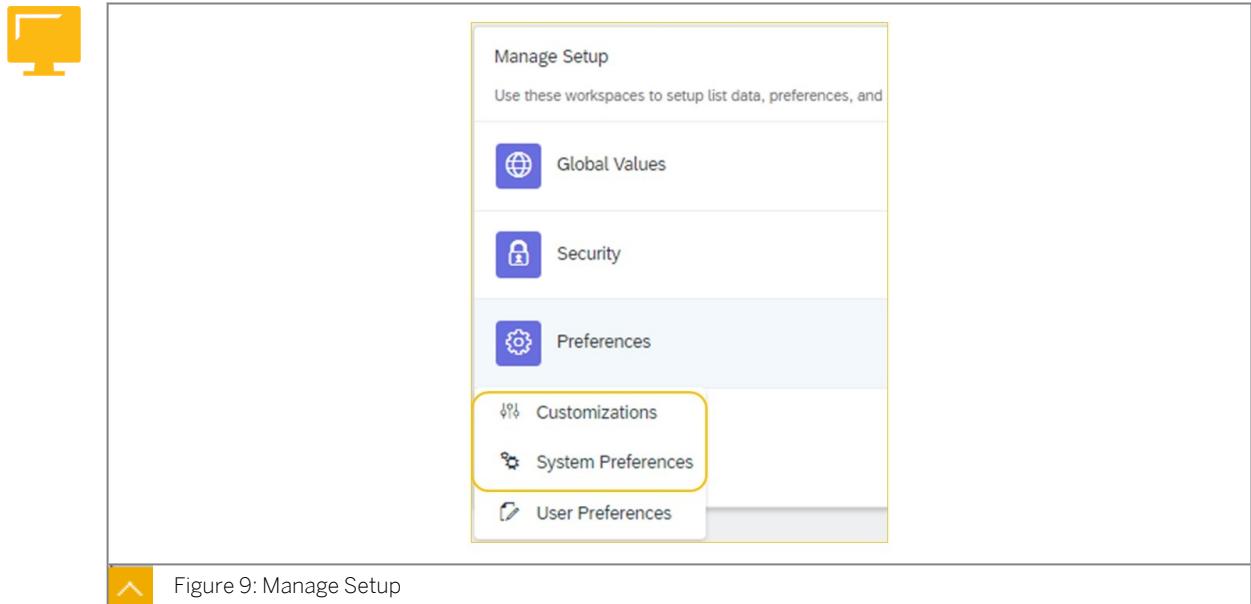
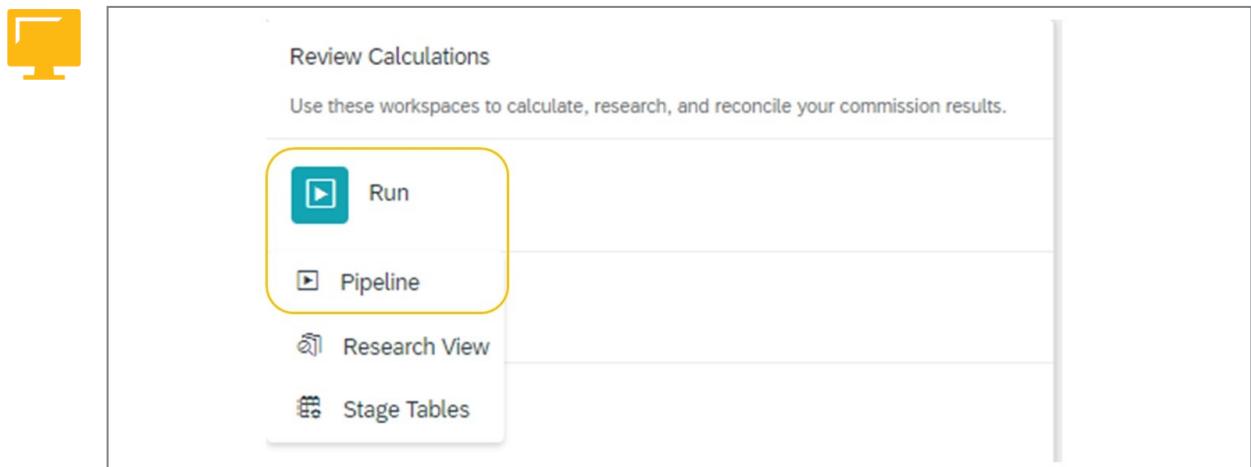


Figure 9: Manage Setup

Review Calculations

Run – Pipeline: The *Pipeline* workspace allows user to run the pipeline, the engine that performs tasks to calculate compensation, import data, create payments and balances, and generate dashboards.

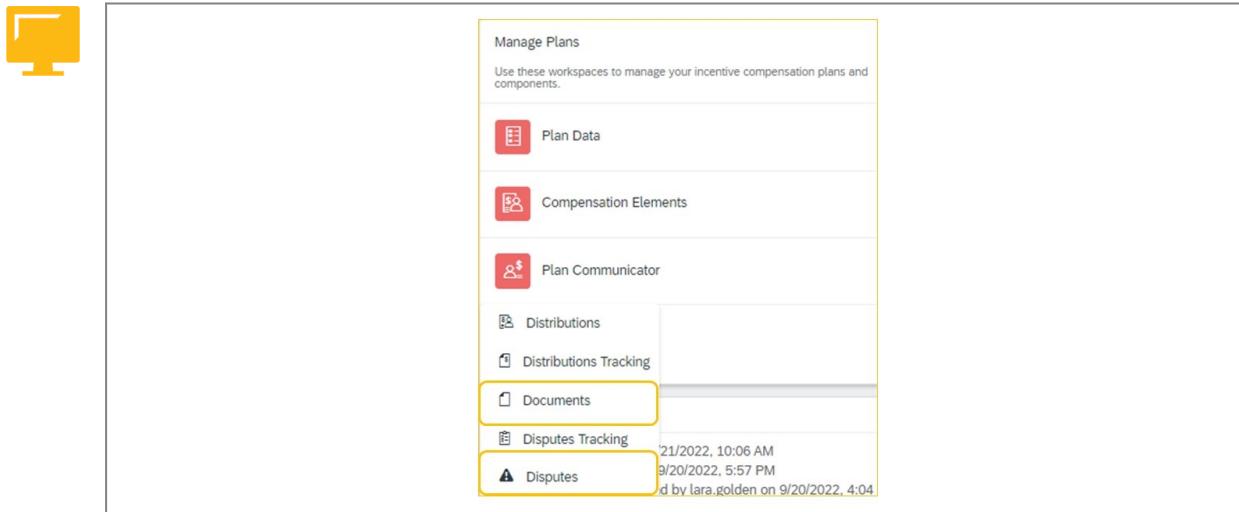


Plan Communicator

Using Plan Communicator, compensation administrators can manage communication with their payees. Plan Communicator includes two modules: Document Distribution and Dispute Management.

Documents: By selecting *Documents*, compensation administrators can manage the creation and distribution process of plan related documents to your payees.

Disputes: Dispute Management allows the administrator to manage templates for compensation disputes. A workflow can be designed to enforce approvals and open communication between the payee and the compensation team.



Common Workspace Elements

SAP Commissions workspaces contain the following common elements:

Summary Pane: Displays all records for the related workspace and default period.

Detail Pane: Displays the details of a record selected in the summary pane.

Default Period: Each user selects the compensation period they wish to view

Search Field: Perform quick, simple, and advanced search for records in the workspace.

Toolbar: Perform standard actions on workspace records, such as create, delete, and copy.

Edit: Edit the selected record.

Figure 10: Common Workspace Elements



Animation: Common Workspace Elements

For more information on *Common Workspace Elements*, please view the animation in the lesson *The SAP Commissions User Interface* in your online course.

User Preferences

User preferences allow each user to manage settings that affect their individual experience.

- **Business Unit/Processing Unit Settings:** Allows a user to select a default Business Unit. Setting this option causes new records created by this user to populate the Business Unit field.
- **Prompt Settings:** Allows the user to select whether or not to prompt when a record is deleted or edited.
- **Default View Data:** Selecting an option under *Set my default view period to* allows a user to specify the period that SAP Commissions user interface opens to on each login. Choices are:
 - **Current date period:** The Default Period is set to correspond to the current system date.
 - **Active period:** Leaves the Default Period set to the value from the previous login.
 - **First Non-Finalized period:** The Default Period is set to the first period that has not been finalized.
- **Negative Value Color:** Allows a user to select the color used for negative numeric values.
- **Load Default Records:** Allows a user to select whether records are loaded when a workspace is opened. If this option is off, opening a workspace will display no records until the user performs a search. This option is on by default.
- **Set Default Record Display:** Allows a user to select how many records are displayed in the summary pane by default. The default value is 10.



Figure 11: User Preferences

Unit 1 Exercise 2

Exercise: Log into SAP Commissions and Set Preferences

Business Example

In this exercise, you will log into SAP Commissions and access the Titles workspace. Once in the Titles workspace, set the Default Period to January 2022. Finally, you will set a preference to retain the active default period.



Simulation

For more information on this topic please view the simulation in the lesson *The SAP Commissions User Interface* in your online course.

1. Log in and open SAP Commissions
2. Set the Default Period to January 2022
3. Set the Default View Period to *Active Period*.

Unit 1

Solution 2

Exercise: Log into SAP Commissions and Set Preferences

Business Example

In this exercise, you will log into SAP Commissions and access the Titles workspace. Once in the Titles workspace, set the Default Period to January 2022. Finally, you will set a preference to retain the active default period.

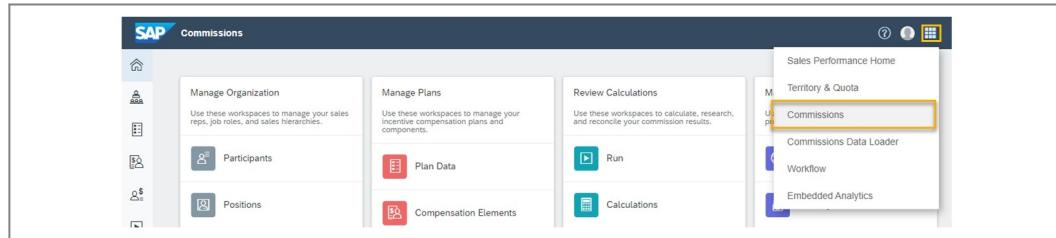


Simulation

For more information on this topic please view the simulation in the lesson *The SAP Commissions User Interface* in your online course.

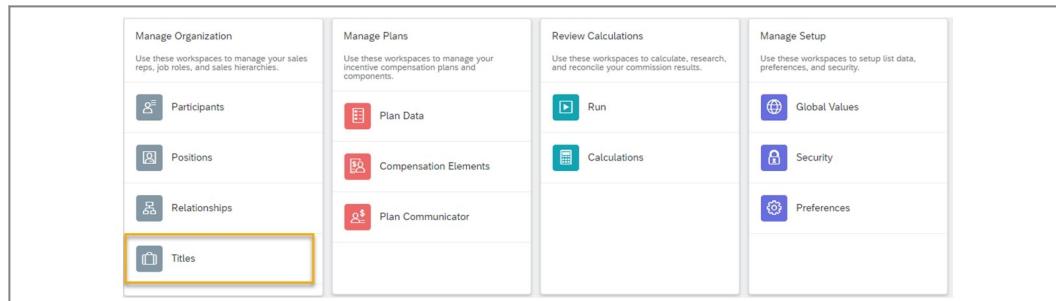
1. Log in and open SAP Commissions

- Open the URL provided by the trainer and enter your user name and password.
- Click the APPS icon and select Commissions.



2. Set the Default Period to January 2022

- Click Titles in the Manage Organization tile.



- Click the calendar icon next to the Default Period.

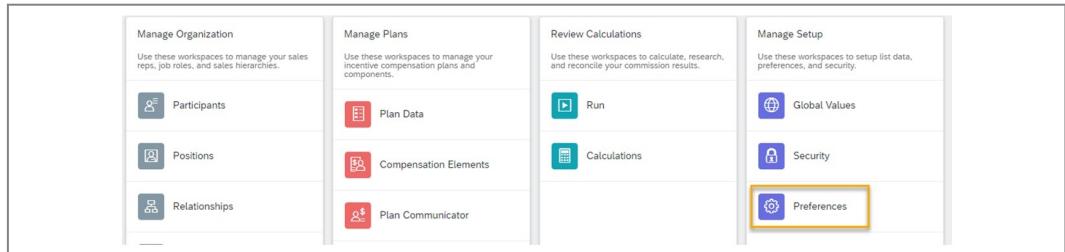


c) Change the date to January 2022.

3. Set the Default View Period to *Active Period*.

a) Use the Home icon to return to the home page.

b) Select *Preferences_User Preferences* on top of the Manage Setup tile .



c) Under *Default View Data*, set the default view to *Active Period*.



d) Click Save.

The Legal Moves Editor

When you are creating formulas and other plan data, you will use the Legal Moves Editor as the graphical interface that allows you to create expressions while enforcing correct input while creating formulas, building plans, and generating advanced searches. You will see this editor many times as we go through this course.

To see examples of the use of the legal moves editor, watch the video on 'Working with the Legal Moves Editor'.



Video: Working with the Legal Moves Editor

For more information on *Working with the Legal Moves Editor*, please view the video in the lesson *The SAP Commissions User Interface* in your online course.

To see examples of the use of the legal moves editor, see the video. [Working with the Legal Moves Editor](#).



LESSON SUMMARY

You should now be able to:

- Navigate the user interface
- Name the key workspaces in SAP Commissions
- Set user preferences

Learning Assessment

1. Which of the following are tasks that a payee can do in SAP Commissions? (Two correct answers)

Choose the correct answers.

- A View Dashboards
- B Create plans
- C Update quotas
- D Raise disputes

2. Under which tile on the home page can you find Calendars, Event Types, and Credit Types?

Choose the correct answer.

- A Global Values
- B Organization Data
- C Pipeline
- D Compensation Elements

3. Where can a user set the default Business Unit?

Choose the correct answer.

- A User Preferences
- B System Preferences
- C Security Settings
- D Global Settings

4. Under which menu will you find the Transactions workspace?

Choose the correct answer.

- A Calculations
- B Pipeline
- C Transactions
- D Documents

UNIT 2

Starting the Implementation

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UNIT OBJECTIVES

- Describe the purpose of the calendar
- Present a scenario in which multiple calendars are used
- List global values and their purposes
- Develop a security structure using business units and roles
- Create a role and set permissions
- Describe the use of processing units
- Activate and relabel generic attributes, numbers, dates, and Boolean
- Determine the best data integration option for an implementation
- Configure an integration scenario using Commissions Data Loader (CDL)

- Upload data using Commissions Data Loader (CDL)
- Use the validate and transfer pipeline task to import data from staging to production
- Purge import data
- Extract payment data from SAP Commissions using Commissions Data Loader (CDL)

Unit 2

Lesson 1

Calendars and Global Values



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the purpose of the calendar
- Present a scenario in which multiple calendars are used
- List global values and their purposes

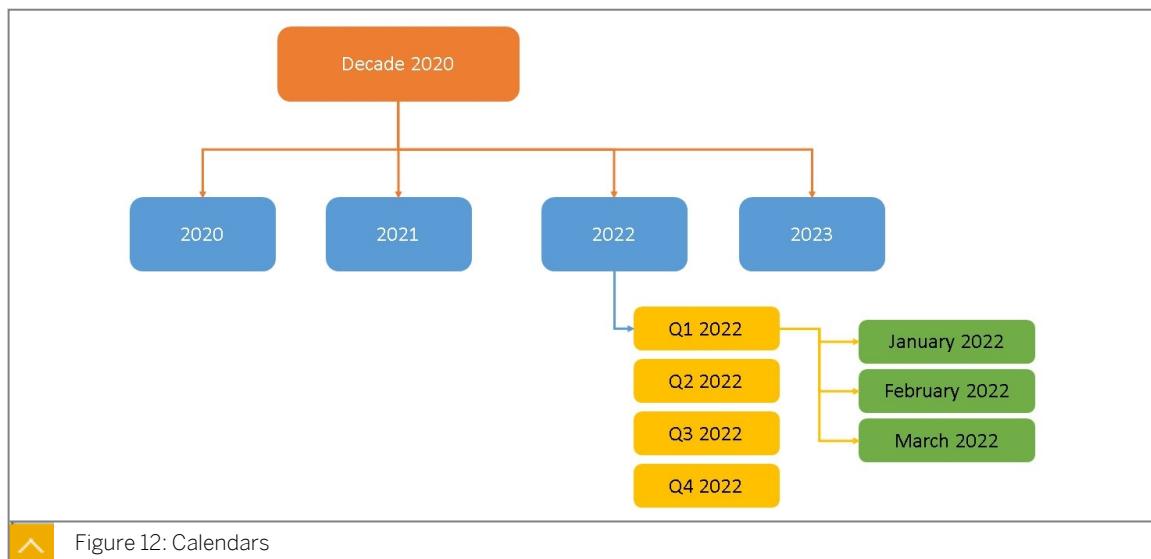
Calendars

The *calendar* is a critical foundation piece to the design and build of your environment. When creating a new SAP Commissions implementation, the first step is to ensure that the calendar is customized to meet the needs of the organization. This means ensuring that the fiscal periods in which calculation is compensated are accurately reflected in the calendar.

In SAP Commissions, calendars are used to structure the fiscal pay periods. Each calendar is composed of a hierarchy of periods, called the *period tree*. The period tree represents units of time for which your company manages compensation.

The smallest or lowest level period in the hierarchy is called the *leaf level* period, which is usually a month or two weeks.

The most common calendar structure uses a month as the leaf level period, three months as a quarter, and twelve months or four quarters as a year. In this case, the quarters and years are the higher-level periods.



- Decade 2020: Jan 1 2020 – Dec 31 2029

- 2020: Jan 1 2020 – Dec 31 2020
- 2021: Jan 1 2021 – Dec 31 2021, etc.
- Q1 2022: Jan 1 2022 – Mar 31 2022, etc.
- January 2022: Jan 1 2022 – Jan 31 2022



Animation: Calendar

For more information on *Calendar*, please view the animation in the lesson *Calendars and Global Values* in your online course.

Multiple Calendars

Organizations can use multiple calendars to manage different payment schedules or pay periods. Each object can only be assigned to one calendar at a time.

Let's look at an example of a scenario in which two calendars are required. GlobeTech pays its independent dealers on a weekly basis, and pays the internal sales team on a monthly basis. Since weeks don't fit neatly within a calendar month, GlobeTech maintains two calendars: one with the week as a leaf level period for the dealers, and one with the month as the leaf level period for the sales team. Both the dealers and the sales team would be assigned to different plans and rules.

Best practices for calendars

- Ensure your calendar structure is complete before you begin any plan development.
- Ensure you have set your default period to the correct period, with the correct calendar (if there are more than one), before you begin rule development. Once a plan element is built to a specific calendar, you cannot alter it.
- Object names must be unique, despite the calendar they are associated with. For example, you cannot have two rules with the same name, with two different calendars.
- The sequence used to build your calendar periods is critical. Use the UI template to ensure it is created in the appropriate order.
- Make sure your calendar is finalized before anything is run. Changing the dates of a period, after a single pipeline has been run, can cause a disconnect in the results. You will not be able to delete a period once a pipeline is run, even if you have no plans set.
- Leaf level periods cannot overlap or contain gaps. If you need a weekly leaf level period, create a new calendar that uses weeks instead of months.
- You will only see results for a plan associated with a calendar if you are in a default period of that same calendar.

Global Values

Global Values are used throughout SAP Commissions to allow manual settings of specific plan, rules, elements, and values data types.



Animation: Global Values

For more information on *Global Values*, please view the animation in the lesson *Calendars and Global Values* in your online course.

Event Types	A label to identify types of transactions. Used to define the type of sales activity a transaction represents, such as booking, invoicing, billing, and shipping
Credit Types	A label to identify types of credits. Used to populate the output of a Credit Rule
Earning Codes	Labels that you can apply to different kinds of deposit earnings. Help external accounting systems to track different department earnings in the organization
Earning Groups	Aggregates groups of deposits into a single payment
Fixed Value Types	Optional labels used to identify types of Fixed Values
Position Groups	A label used to group multiple Positions. Calculations can be run for a single Position Group
Reason Codes	Identify the reason for adjustments or modifications to transactions, credits, or deposits
Unit Types	Used to identify the type of unit a numerical value represents



Video: Creating Position Groups

For more information on *Creating Position Groups*, please view the video in the lesson *Calendars and Global Values* in your online course.

Watch the video on '[Creating Position Groups](#)'.

Best practices for global values

- Once pipelines are run, do not delete the existing Global Values.
- Avoid “recycling” Global Values. If the business model changes and the data needs change, create new Global Values instead of renaming deprecated Global Values.
- Define all Event Types during the initial Global Values setup.

Unit 2

Exercise 3

Exercise: Create Global Values and Set Preferences

Business Example

In this exercise, you will ensure that all incoming transactions have a corresponding Business Unit and Event Type. Since the *Product Sales* Event Type has not been created, we will set it up now. We will also create the *BikesInMotion* Business Unit and set it as the default, and set up two Position Groups.



Simulation

For more information on this topic please view the simulation in the lesson *Calendars and Global Values* in your online course.

1. Create a new Business Unit called *BikesInMotion*.
2. Create an Event Type called *Product Sales*.
3. Repeat step 2 to create a second event type called *Services Sales*.
4. Create two Position Groups called *Americas* and *EMEA*.
5. Set *BikesInMotion* as your default business unit.

Unit 2 Solution 3

Exercise: Create Global Values and Set Preferences

Business Example

In this exercise, you will ensure that all incoming transactions have a corresponding Business Unit and Event Type. Since the *Product Sales* Event Type has not been created, we will set it up now. We will also create the *BikesInMotion* Business Unit and set it as the default, and set up two Position Groups.



Simulation

For more information on this topic please view the simulation in the lesson *Calendars and Global Values* in your online course.

1. Create a new Business Unit called *BikesInMotion*.
 - a) Select the Security icon in the Manage Setup tile.
 - b) Select *Business Units*.
 - c) Select the Add icon.
 - d) Type *BikesInMotion* in the name field.
 - e) Select Save.
2. Create an Event Type called *Product Sales*.
 - a) Return to the Home Page.
 - b) Select *Global Values* in the Manage Setup tile.
 - c) Select *Event Types*.
 - d) Select the create (+) icon.
 - e) In the ID field, type *Product Sales* for the name.
 - f) Click the Save icon.
3. Repeat step 2 to create a second event type called *Services Sales*.
4. Create two Position Groups called *Americas* and *EMEA*.
 - a) Return to the Home Page.
 - b) Select *Global Values* in the Manage Setup tile.
 - c) Select *Position Groups*.

- d) Select the create (+) icon.
 - e) In the name field, enter *Americas*.
 - f) Select Save.
 - g) Repeat step 4 to add a second position group called EMEA.
5. Set *BikesInMotion* as your default business unit.
- a) From the *Preference* menu, select *User Preferences*.
 - b) Set the default business unit to *BikesInMotion* and select *Save*.



LESSON SUMMARY

You should now be able to:

- Describe the purpose of the calendar
- Present a scenario in which multiple calendars are used
- List global values and their purposes

Unit 2

Lesson 2

Security



LESSON OBJECTIVES

After completing this lesson, you will be able to:

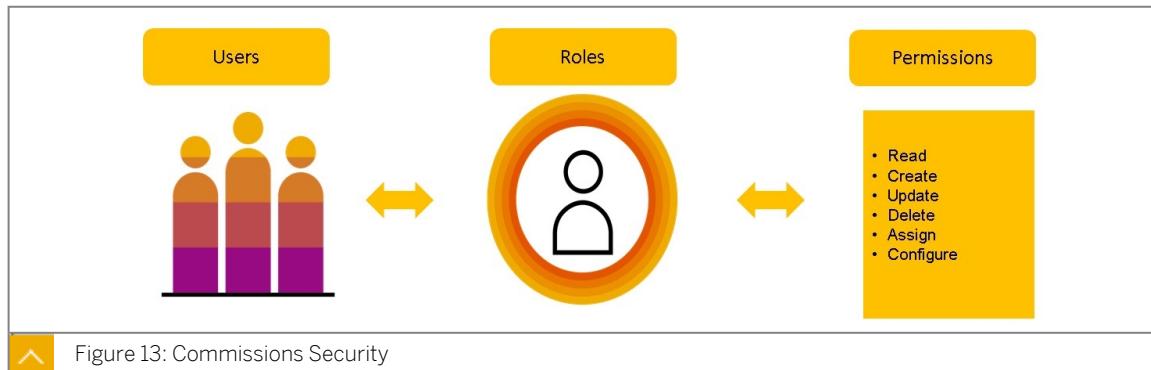
- Develop a security structure using business units and roles
- Create a role and set permissions

Business Unit and Role-Based Security

SAP Commissions uses a role-based security model, which allows users access to data based on their user login and password.

Management and access to data in the SAP Commissions user interface is controlled using two types of security: Role-Based Security and Business Unit Security. For additional system security, audit logs are available to view and track edits by user, date and time of the change.

- Users are individuals with permission to perform actions in SAP Commissions. This may include viewing or editing data, deleting records, or performing administrative tasks.
- A role is a group of permission settings that apply to all users assigned to that role. Assigned roles with pre-defined permissions makes it easier for an administrator to control user access to data.



Business Units

Business Units allow organizations to control access for specific departments, divisions, groups, or portions of an organization. Business Units are used to restrict user access to data, and to segregate compensation data for dashboards and analytics.



Video: Understanding Business Units in SAP Commissions
For more information on *Understanding Business Units in SAP Commissions*, please view the video in the lesson *Security* in your online course.

Watch the video on '[Understanding Business Units in SAP Commissions](#)'.

- Users can be assigned to multiple Business Units.
- Elements that have no assigned Business Units are visible to all users.
- Positions can only be assigned to a single Business Unit.
- Security and Global data such as event types, unit types, and roles are not assigned to Business Units.
- Calculations are not run in the context of a Business Unit. They can, however, be run by Position Group.

Role-Based Security

Permissions represent the level of access to an object or the ability to perform a specified action. For example, a role may allow members to read create and edit records in the Participants workspace, but only read records in the Transactions workspace.

Permissions contain a number of *Permission Sets* that organize types of permissions into logical groups, making it easier to find a type of data. For example, a permission set called *Organization* groups the Participants, Positions, Titles, Roll Types, and Position Groups.

Unit 2

Exercise 4

Exercise: Create a Role and Assign a User

Business Example

In this exercise, we will create a role that will grant permissions to our compensation team members. We will also create a new user and assign her to the role.



Simulation

For more information on this topic please view the simulation in the lesson *Security* in your online course.

1. Create a role called *Comp Admins* that allows access to Organization and Plan data.
2. Create a user named Paula Wolf and assign her to the new role. We will also give her full access to the BikesInMotion Business Unit.

Unit 2

Solution 4

Exercise: Create a Role and Assign a User

Business Example

In this exercise, we will create a role that will grant permissions to our compensation team members. We will also create a new user and assign her to the role.

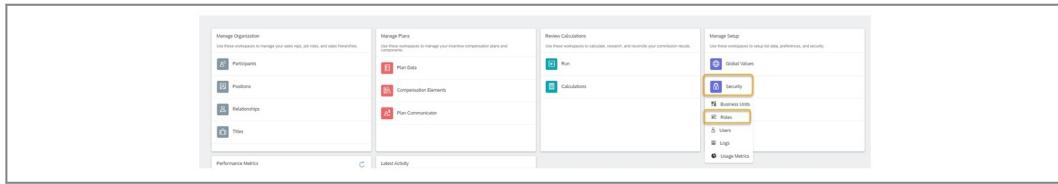


Simulation

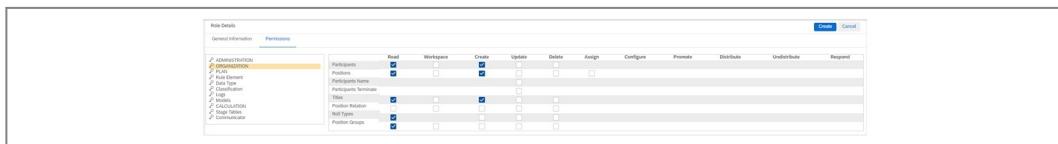
For more information on this topic please view the simulation in the lesson *Security* in your online course.

1. Create a role called *Comp Admins* that allows access to Organization and Plan data.

- a) From the Manage Setup tile, click *Security – Roles*.



- b) Click the Create (+) icon on the toolbar.
- c) Enter the name *Comp Admins*.
- d) Click the *Permissions* tab.
- e) Click the *Organization* permission set.



- f) Using the checkboxes, allow Update for Participants, Positions and Titles.
- g) Click the *Plan Position Group*.
- h) Using the checkboxes, allow Create for all objects.
- i) Click the Save button to save the role.

2. Create a user named Paula Wolf and assign her to the new role. We will also give her full access to the BikesInMotion Business Unit.

- a) Return to the Home Page.
- b) Click *Security – Users*.
- c) Click *Create (+)*.

d) Enter the following information for the new user:

User ID: paula.wolf

Full name: Paula Wolf

Read Only Business Units: Any Business Unit

Full Access Business Units: BikesInMotion

Password: Training101

Set Paula's role to Comp Admin: Select Associated Roles

e) Select *Comp Admins* from the dropdown list.

f) Select *Create*.



LESSON SUMMARY

You should now be able to:

- Develop a security structure using business units and roles
- Create a role and set permissions

Unit 2

Lesson 3

Processing Units



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the use of processing units

Processing Units

A *processing unit* is a feature that allows calculation processing for subsets of data. Use processing units if your requirements include the need to run compensation calculations at different times or on different compensation cycles. When using processing units, data is partitioned logically within a single Commissions tenant.

Let's look at an example of the use of processing units in a geographic context.

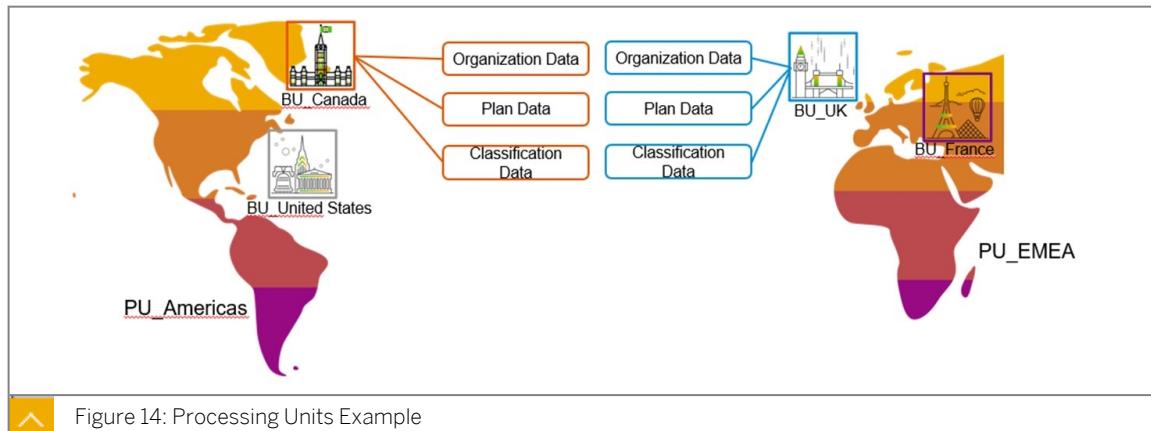


Figure 14: Processing Units Example

In the image above, our organization has a separate business unit for each country. We now wish to run pipelines and other processes separately for our two global regions, Americas and EMEA, in order to maximize pipeline speed in each region. To do this, we can create two processing units, PU_Americas and PU_EMEA, and assign the business units for the countries in each region to their respective processing units. For example, the business units BU_Canada and BU_United States would be assigned to the PU_Americas processing unit.

Watch the following video to learn more about processing units.



Video: Creating Processing Units

For more information on *Creating Processing Units*, please view the video in the lesson *Processing Units* in your online course.

Watch the video on '[Creating Processing Units](#)'.

A few key points about processing units:

- You can create as many processing units as needed.
- Processing units are defined by associating them with business units. There is no limit to the number of business units associated with a processing unit.

Figure 15: Assigning a Processing Unit to a Business Unit

- When creating processing units, segments are created in database tables. This increases performance and data level security.
- Calculation runs are completed separately for each processing unit.
- Reference data such as compensation elements, organization data, and classification data can be assigned to multiple processing units.
- Some data, including positions, transactions, orders, and results data, can be assigned to only one processing unit.
- Processing units cannot be deleted.

To learn more about using processing units when calculating data, see this video.



Video: Calculation using Processing Units

For more information on *Calculation using Processing Units*, please view the video in the lesson *Processing Units* in your online course.

Watch the video on '[Calculation using Processing Units](#)'.

Best practices for processing units

- Even if you don't need to use processing units, create a single processing unit and assign all business units to it. This way, as the organization grows, it will be easier to scale as a business unit structure is already in place.
- Always create a processing unit before starting build of compensation components.
- Once you enable Processing Units, you cannot reverse it. Enabling Processing Units affects how your data is segmented, so please don't enable it if you are not sure you want to use it.



LESSON SUMMARY

You should now be able to:

- Describe the use of processing units

Unit 2

Lesson 4

Customizations



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Activate and relabel generic attributes, numbers, dates, and Boolean

Customizing the User Interface

In the Customizations workspace, existing fields can be relabeled or deactivated, and custom fields can be activated.



Video: How to Customize the SAP Commissions User Interface

For more information on *How to Customize the SAP Commissions User Interface*, please view the video in the lesson *Customizations* in your online course.

Watch the video on '[How to Customize the SAP Commissions User Interface](#)'.

During implementation, once you have determined which fields will be populated from incoming data, activate Generic Attributes, or custom fields, to receive the data.



Customizations					
View: Admin End User		Locale: English ▾	Default Period: January 2022		
Active	Attribute	Default Value	Custom Value	PII Setting	
<input checked="" type="checkbox"/>	Plural Name	Participants	Participants	PII	
<input checked="" type="checkbox"/>	Participant ID	Participant ID	Participant ID	Not PII	
<input checked="" type="checkbox"/>	Last Modified	Last Modified	Last Modified	Not PII	
<input checked="" type="checkbox"/>	Effective Start Date	Effective Start Date	Effective Start Date	Not PII	
<input checked="" type="checkbox"/>	Effective End Date	Effective End Date	Effective End Date	Not PII	
<input checked="" type="checkbox"/>	Prefix	Prefix	Prefix	Not PII	
<input checked="" type="checkbox"/>	First Name	First Name	First Name	PII	
<input checked="" type="checkbox"/>	Middle Name	Middle Name	Middle Name	PII	
<input checked="" type="checkbox"/>	Last Name	Last Name	Last Name	PII	
<input checked="" type="checkbox"/>	Suffix	Suffix	Suffix	Not PII	
<input checked="" type="checkbox"/>	Tax ID	Tax ID	Tax ID	Sensitive PII	
<input checked="" type="checkbox"/>	Base Salary	Base Salary	Base Salary	Sensitive PII	
<input checked="" type="checkbox"/>	Hire Date	Hire Date	Hire Date	Not PII	
<input checked="" type="checkbox"/>	Termination Date	Termination Date	Termination Date	Not PII	
<input checked="" type="checkbox"/>	User Name	User Name	User Name	PII	
<input checked="" type="checkbox"/>	Email	Email	Email	PII	
<input checked="" type="checkbox"/>	Preferred Language	Preferred Language	Preferred Language	Not PII	
<input checked="" type="checkbox"/>	Event Calendar	Event Calendar	Event Calendar	Not PII	
<input checked="" type="checkbox"/>	Display Name Format	(0) (1) (2) (3) (4)	(0) (1) (2) (3) (4)	Not PII	
<input checked="" type="checkbox"/>	Generic Attribute 1	Generic Attribute 1	GAI: Sales Status	Not PII	
<input type="checkbox"/>	Generic Attribute 2	Generic Attribute 2		Not PII	



Figure 16: Customizations



Animation: Customizing the User Interface

For more information on *Customizing the User Interface*, please view the animation in the lesson *Customizations* in your online course.

In the Customizations workspace, you can:

- Relabel an existing attribute.
 - Example: Relabel the Participants workspace to Payees or Brokers
- Create additional classifier types
 - Example: Create a classifier type called Industries
- Indicate fields as Personally Identifiable Information(PII) to comply with GDPR regulation
 - Example: A generic attribute on the Participant record contains the employee's street address. This can be set to sensitive PII to ensure this information is purged according to the organization's requirements.
- Manage and create generic (custom) attributes.
 - Example: Each Participant has a Sales Status that affects their bonus amount. A generic attribute called GA1:Sales Status is created to hold this value.
- Change the attribute label using the Custom Value column
 - Example: The organization refers to the Position as the Job Code. The Position Name attribute can be relabeled to Job Code to reflect the business language.
- Customize labels for different languages and locales
 - Example: Many users on the compensation team are in Latin America and prefer to use the system in Spanish. A Spanish locale can be created, and the attributes can be further customized to reflect the business terms.
- Add extended attributes
 - If all generic attributes are used, more attributes can be added activating Extended Attributes. Because the use of Extended Attributes can affect processing time, use the default generic attributes first, especially if these attributes will be used in rule calculation.

All workspaces have four types of attributes:

- Generic Attributes (GA) – fields that contain text entries
- Generic Numbers (GN) – fields that contain only numeric entries
- Generic Dates (GD) – fields that contain date entries
- Generic Booleans (GB) – fields that contain Boolean entries (True/False, Yes/No)

Unit 2

Exercise 5

Exercise: Customize the User Interface

Business Example

In this exercise, you customize SAP Commissions by activating Generic Attributes on the Position and Participant workspaces for the Sales Status, Bonus Level, Date Eligible for Bonus, and Bonus Eligibility.



Simulation

For more information on this topic please view the simulation in the lesson *Customizations* in your online course.

1. Add a Generic Attribute to the *Positions* workspace for the region.
2. Add four Generic Attributes to the Participants workspace for the Sales Status, Bonus Level, Date Eligible for Bonus, and Bonus Eligibility.

Unit 2

Solution 5

Exercise: Customize the User Interface

Business Example

In this exercise, you customize SAP Commissions by activating Generic Attributes on the Position and Participant workspaces for the Sales Status, Bonus Level, Date Eligible for Bonus, and Bonus Eligibility.



Simulation

For more information on this topic please view the simulation in the lesson *Customizations* in your online course.

1. Add a Generic Attribute to the *Positions* workspace for the region.
 - a) Select the *Preferences* icon in the *Manage Setup* tile.
 - b) Click *Customizations*.
 - c) Expand *Organizations* and select *Positions*.
 - d) Scroll down the list of attributes.
 - e) Check the box next to *Generic Attribute 1*.
 - f) In the *Custom Value* field, type *GA1:Region*.
 - g) Under the PII Setting column, select *Not PII*.

Active	Attribute	Default Value	Custom Value
<input checked="" type="checkbox"/>	Display Name	Position	Position
<input checked="" type="checkbox"/>	Plural Name	Positions	Positions
<input checked="" type="checkbox"/>	Description	Description	Description
<input checked="" type="checkbox"/>	Last Modified	Last Modified	Last Modified
<input checked="" type="checkbox"/>	Effective Start Date	Effective Start Date	Effective Start Date
<input checked="" type="checkbox"/>	Effective End Date	Effective End Date	Effective End Date
<input checked="" type="checkbox"/>	Name	Name	Name
<input checked="" type="checkbox"/>	Manager	Manager	Manager
<input checked="" type="checkbox"/>	Participant	Participant	Participant
<input checked="" type="checkbox"/>	Target Compensation	Target Compensation	Target Compensation
<input checked="" type="checkbox"/>	Credit Start	Credit Start	Credit Start
<input checked="" type="checkbox"/>	Credit End	Credit End	Credit End
<input checked="" type="checkbox"/>	Process Start	Process Start	Process Start
<input checked="" type="checkbox"/>	Process End	Process End	Process End
<input checked="" type="checkbox"/>	Last Finalized Period	Last Finalized Period	Last Finalized Period
<input checked="" type="checkbox"/>	Generic Attribute 1	Generic Attribute 1	GA1: Region

- h) Click the Save icon.

2. Add four Generic Attributes to the Participants workspace for the Sales Status, Bonus Level, Date Eligible for Bonus, and Bonus Eligibility.

- a) Expand Organizations and select *Positions*.
- b) Scroll down the list of attributes.
- c) Check the box next to Generic Attribute 1.
- d) In the Custom Value field, type *GA1:Region*.
- e) Under the PII Setting column, select *Not PII*.
- f) Scroll down to activate attributes for Generic Number, Generic Date, and Generic Boolean, using the list below.
- g) Select the **Save** icon.
- h) Repeat these steps to activate and rename other Generic Attributes as shown below:

Attribute Name	Custom Value
Generic Number 1	GN1:Bonus Level
Generic Date 1	GD1:Date Eligible For Bonus
Generic Boolean 1	GB1:Bonus Eligibility



LESSON SUMMARY

You should now be able to:

- Activate and relabel generic attributes, numbers, dates, and Boolean

Unit 2

Lesson 5

Data Integration



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Determine the best data integration option for an implementation
- Configure an integration scenario using Commissions Data Loader (CDL)
- Upload data using Commissions Data Loader (CDL)
- Use the validate and transfer pipeline task to import data from staging to production
- Purge import data
- Extract payment data from SAP Commissions using Commissions Data Loader (CDL)

Options for Data Integration

Typically, the data used to calculate compensation originates in various source systems outside of SAP Commissions. The Data Integration process is used to ensure that this data is properly mapped and updated regularly before each calculation is run.

For example, payees enter their sales transactions into a CRM tool. The transaction data is integrated into SAP Commissions, where the payments are then calculated.

When using most data integration options, inbound data moves to a series of *staging tables*.



Video: Data Integration Tools in SAP Commissions

For more information on *Data Integration Tools in SAP Commissions*, please view the video in the lesson *Data Integration* in your online course.

Watch the video on '[Data Integration Tools in SAP Commissions](#)'.

Table 1: SAP Commissions Data Integration Solutions

Data Integration Solutions	Excel Data Loaders	Commissions Data Loader (CDL)	Smart Data Integration (SDI)	SAP Cloud Platform Integration	REST API
Use Case	Ad Hoc data imports	Small to Medium Sized organizations	Large enterprise organizations, 3 rd party source data	Large enterprise organizations, primarily SAP source data	Custom API client

User Type	Business	Business or Technical	Technical	Technical	Technical
Frequency	Ad Hoc	Ad Hoc or scheduled drop	Scheduled or real-time	Scheduled or real-time	Real-Time
Data Volume	<1,000 rows	Up to 5 Million rows or 1 GB data per drop file	Higher Volume than CDL	1,000 to 100,000 rows	<1,000 rows per call
Data Transformations	None	HANA stored procedures	Flowgraph based transformations	Integration flow-based transformations	None
Connectors	None	None	In-built adapters / connectors for source systems	SAP Cloud Platform marketplace	None
License	Included in Core Commissions	Included in Core Commissions	Included in Core Commissions	Available through SAP Cloud Platform	Included in Core Commission

- **Excel Data Loaders** are used for ad hoc data loads on the user level. It is not designed for high volume data transfers.
- **The Commissions Data Loader** is an ideal solution for small to medium-sized businesses. This tool is included with SAP Commissions and uses a secure dropbox to load high volumes of data. The data transfer is completed with HANA procedures.
- **Smart Data Integration (SDI)** is designed for high data volume and data transformation. It uses Web IDE, a graphical tool, to define flowgraphs for data transformations. SDI requires technical expertise to accomplish data integrations.
- **SAP Cloud Platform Integration (CPI)** connects applications to transfer data from one system to another through the cloud. CPI is available through SAP Cloud Platform.
- **REST APIs** are new configured APIs. Typically, APIs are used for smaller volumes of data, with real-time integration.

Unit 2

Exercise 6

Exercise: Import Organization Data and Transaction Data

Business Example

In this exercise, you will use the instructions below to import Organization Data and Transactions into Commissions. You will use this transaction data to build a compensation plan throughout this course.



Simulation

For more information on this topic please view the simulation in the lesson *Data Integration* in your online course.

1. Import Organization Data
2. Import transaction data.
3. Import Classification data

Unit 2 Solution 6

Exercise: Import Organization Data and Transaction Data

Business Example

In this exercise, you will use the instructions below to import Organization Data and Transactions into Commissions. You will use this transaction data to build a compensation plan throughout this course.

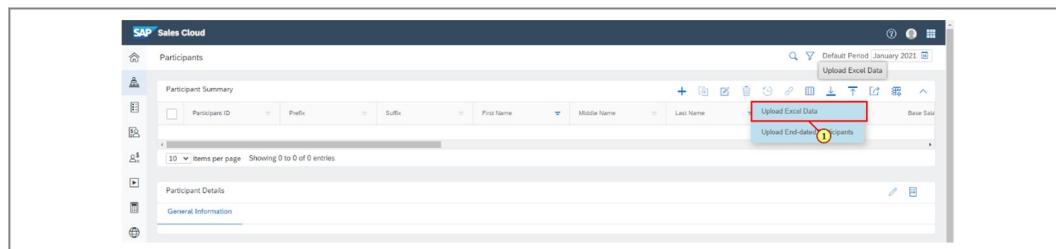


Simulation

For more information on this topic please view the simulation in the lesson *Data Integration* in your online course.

1. Import Organization Data

- Select the *Participants* icon in the Manage Organization tile.
- Select the *Upload Excel Data* icon on the toolbar.



- Select *Choose File*.
- Select the *BikesInMotion Organization Data.xlsx* file.
- Select *Upload Excel Data*.
- When the import is complete select the *Quick Search* icon to refresh the workspace.

2. Import transaction data.

- Return to the home screen and select *Calculations - Transactions* in the Review Calculations tile.
- Select the *Upload Excel Data* icon on the toolbar.
- Select *Choose File*.
- Select the *BikesInMotion Transaction Data.xlsx* file.
- Select *Upload Excel Data*.
- When the import is complete select the *Quick Search* icon to refresh the workspace.

3. Import Classification data

- a) On the home screen, select *Plan Data - Classification* icon in the Manage Plans tile.
- b) Select the *Upload Excel Data* icon on the toolbar.
- c) Select *Choose File*.
- d) Select the *BikesInMotion Transaction Data.xlsx* file.
- e) Select *Upload Excel Data*.
- f) When the import is complete select the Quick Search icon to refresh the workspace.

Configuring an Integration Scenario Using Commissions Data Loader (CDL)

Commissions Data Loader (CDL) is a cloud-based tool that allows you to securely import and export data to and from SAP Commissions without the need for coding. CDL enables the compensation team to synchronize data with SAP Commissions.

CDL can be used to import data, such as Transactions or Payees, from the CRM, or Product Data from the ERP system. You can also use CDL to export data, such as payout data, to a payroll system or provider.

Global and file type settings

To start using Commissions Data Loader, the first step is to configure file requirements. This had three steps: global settings, inbound file type settings, and outbound file type settings.

Global settings are default settings that apply to both inbound and outbound file transfers. Global settings include such options as the default time zone, character encoding, compression type, and the email recipient for success and failure notifications.

Inbound file type settings include the standard settings and metadata of each file that is imported. A file type must be configured for each template file, which means that every template must have an associated file type. Settings include the file type, import options, and target staging table. You can also override the default character set and delimiter by setting these in the file type settings.

Outbound file type settings include the standard settings and metadata of each file that is exported, such as payment data. Settings include the outbound file type, source stored procedure, and compression mode. As with inbound file type settings, you can override the default character set and delimiter by setting these in the file type settings.



Animation: CDL Global Settings

For more information on *CDL Global Settings*, please view the animation in the lesson *Data Integration* in your online course.



Animation: CDL File Type Settings

For more information on *CDL File Type Settings*, please view the animation in the lesson *Data Integration* in your online course.

To configure global settings:

1. From the application picker, select *Commissions Data Loader*.
2. Select *Configuration – Global Settings*.

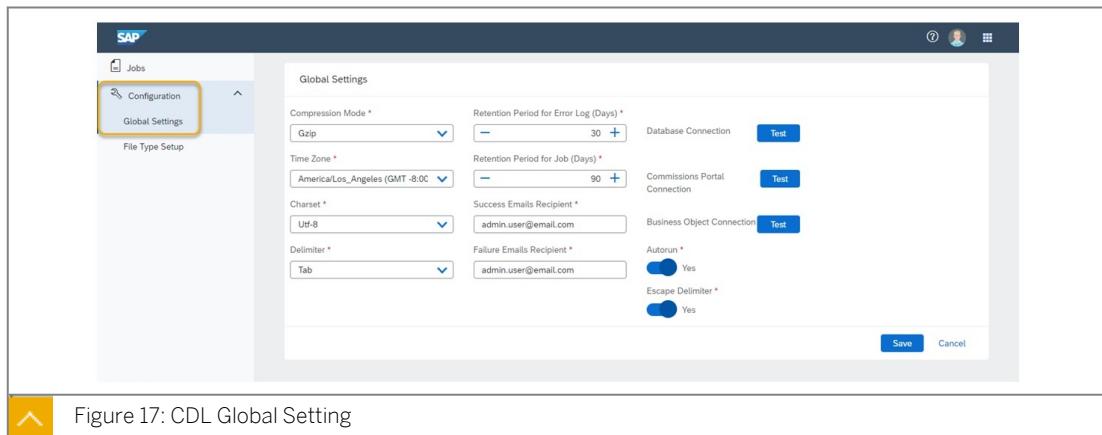


Figure 17: CDL Global Setting

3. Set the compression mode. The default is Gzip.
4. Set the time zone. This is used for the timestamp on the job.
5. Select a character encoding attribute (Charset). The default is UTF-8.
6. Select a *delimiter*. The default is tab delimited.
7. Select a retention period for error logs and jobs. The defaults are 30 days and 90 days, respectively.
8. Enter an email for notification of success and failure emails.
9. Using the Autorun switch, indicate whether the import should run automatically once the file upload is executed.
10. Select an escape delimiter. This setting specifies if comma separated files which have a delimiter as part of its data can be loaded. When this option is enabled, you can use double quotation marks for importing values which have a delimiter as part of the field ("").
11. Select Save.

To configure inbound file type settings:

1. Select Configuration – File Type Setup.
2. Scroll or search for the file type. The example below shows the setup for sales transactions.

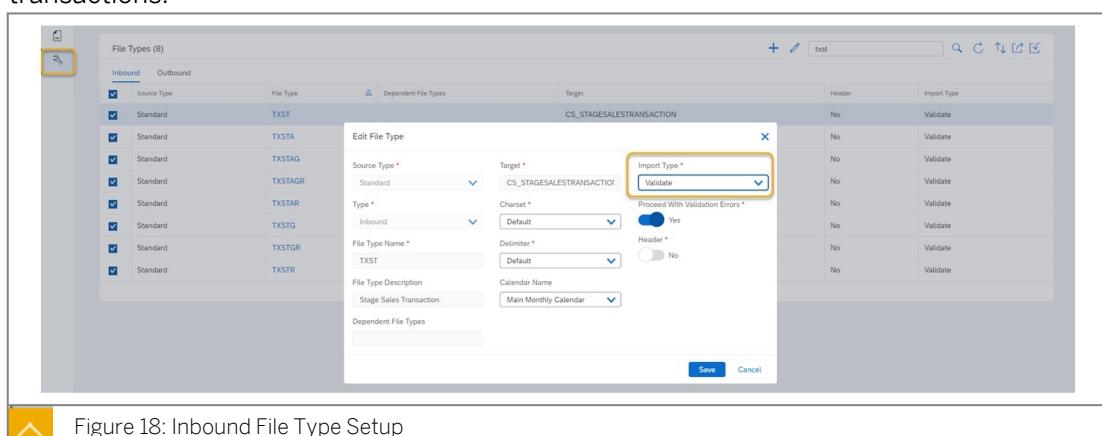


Figure 18: Inbound File Type Setup

3. Select a character encoding attribute (Charset) or leave it at the global default.
4. Select a delimiter or leave it at the global default.

5. Select an import type. More information on import types is covered in the next topic.
6. Select the switch to proceed with an import if errors are found in validation.
7. Select the Header switch if your data file has headers.



Video: Commissions Data Loader – Global and File Settings

For more information on *Commissions Data Loader – Global and File Settings*, please view the video in the lesson *Data Integration* in your online course.

Watch the video on '[Commissions Data Loader – Global and File Settings](#)'.

Configure global and file settings



Simulation: Configuring global and file settings

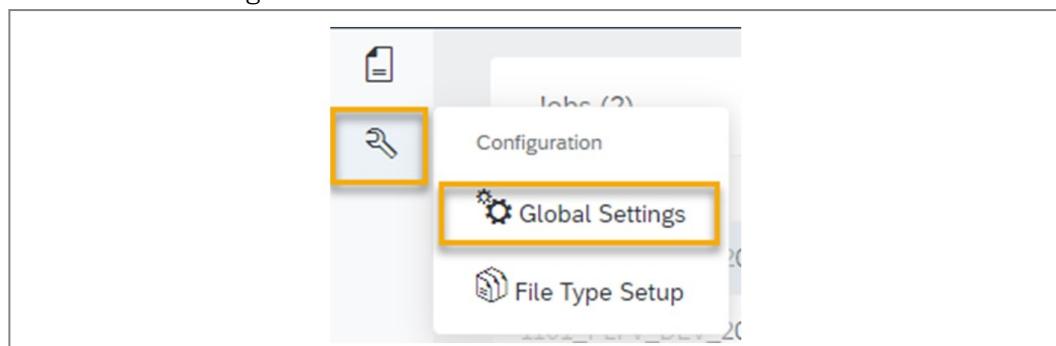
For more information on *Configuring global and file settings*, please view the simulation in the lesson *Data Integration* in your online course.

1. From the Application picker, select *Commissions Data Loader*.

Commissions Data Loader will open in a new tab.

2. Update the Global Settings.

- a. Select the *Configuration* icon.
- b. Select *Global Settings*.



- c. Update the fields in the dialog box as shown:

Global Settings	
Compression Mode *	Gzip
Time Zone *	America/Los_Angeles (GMT -8:00)
Charset *	Utf-8
Delimiter *	Tab
Retention Period for Error Log (Days) *	30
Retention Period for Job (Days) *	90
Success Emails Recipient *	admin.user@email.com
Failure Emails Recipient *	admin.user@email.com
Database Connection	<input type="button" value="Test"/>
Commissions Portal Connection	<input type="button" value="Test"/>
Business Object Connection	<input type="button" value="Test"/>
Autorun *	<input type="radio"/> No
Escape Delimiter *	<input checked="" type="radio"/> Yes
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- **Compression Mode:** Gzip
- **Time Zone:** Any
- **Charset:** Utf-8
- **Delimiter:** Tab
- **Success Emails Recipient:** admin.user@email.com
- **Failure Emails Recipient:** admin.user@email.com

**Note:**

Optionally, use your own email for the email recipients to see what the emails look like.

- **Autorun:** No
- **Escape Delimiter:** Yes

3. Select Save.

Uploading Data Using Commissions Data Loader (CDL)

Various templates are provided to upload data to Commissions. Each template is specific to an inbound file type and relates to a Commissions business object. All the templates are in .xls format and are available as a downloadable .zip file. They can be downloaded from the online help [here](#).

The following video shows how to find and download the CDL templates, how to populate the templates, and how to name and save them using the naming convention.

**Video: Commissions Data Loader – File Templates**

For more information on *Commissions Data Loader – File Templates*, please view the video in the lesson *Data Integration* in your online course.

Watch the video on '[Commissions Data Loader \(CDL\) Uploading Files](#)'.

Once the templates are in place, it's time to upload the data to SAP Commissions. This is done from the Jobs tab in CDL.

**Video: Commissions Data Loader – Uploading Files**

For more information on *Commissions Data Loader – Uploading Files*, please view the video in the lesson *Data Integration* in your online course.

Watch the video on '[Commissions Data Loader – Uploading Files](#)'.

Exercise: Uploading Transactions using Commissions Data Loader



Simulation

For more information on this topic please view the simulation in the lesson *Data Integration* in your online course.

Validate and Transfer

When loading data from external sources, stage tables help us validate the data before it is moved into the production tables. It also provides an opportunity to back data out of the system, if we see any problems.

The stage tables can be found under Review Calculations – Run – Stage Tables.



The screenshot shows the SAP Commissions interface. On the left, there's a sidebar with icons for Participants, Positions, Relationships, and Titles. Below that is a Performance Metrics section with various statistics like Total Payees (10), Total Transactions (37), Total Deposits (10), Total Deposit Value (50,469.28), and Total Payments (57,469.28). The main area has four sections: Manage Organization, Manage Plans, Review Calculations, and Manage Setup. In the Review Calculations section, the 'Run' button is highlighted with a yellow box. Below it, 'Stage Tables' is also highlighted with a yellow box. The 'Latest Activity' log shows several entries related to logins and data reads by users like lara.golden and Greg Chen.

The Validate and Transfer process can be initiated from Commissions Data Loader, or it can be run independently after the data is loaded. A Validate and Transfer process is initiated as a Pipeline task by selecting the Import Data from Stage task.

The easiest way to initiate a Validate and Transfer task is to select the Import Type option during the File Type Setup in Commissions Data Loader. Setting the Import Type to None will not run Validate and Transfer. Other Import Type options are Validate, Validate and Transfer, and Validate and Transfer if All Valid.



The screenshot shows the CDL interface. On the left, there's a list of file types: Standard (TXST, TXSTA, TXTAG, TXSTAR, TXSTG, TXSTGR, TXSTR). A specific row for TXST is selected and highlighted with a yellow box. An 'Edit File Type' dialog is open over the list, showing details for TXST. In the dialog, the 'Target' dropdown is set to 'CS_STAGESALETRANSACTION' and is highlighted with a yellow box. Other settings in the dialog include 'Import Type' (set to 'Validate'), 'CharSet' (set to 'Default'), 'Delimiter' (set to 'Default'), 'Proceed With Validation Errors' (radio button set to 'Yes'), and 'Header' (radio button set to 'No'). At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 20: Validate and Transfer Settings in CDL



Video: Commissions Data Loader – Validate and Transfer

For more information on *Commissions Data Loader – Validate and Transfer*, please view the video in the lesson *Data Integration* in your online course.

Watch '[Commissions Data Loader – Validate and Transfer](#)' video to learn how to complete the Validate and Transfer task in the SAP Commissions user interface.

Purging Data

Once stage data has been imported, there is often no need to keep it in the stage tables. Therefore, it's a good idea to regularly purge data from the stage tables. Purging data has two advantages: it increases performance of the CDL data upload process, and it reduces the amount of stored data.

Data can be purged in the SAP Commissions user interface or by using Commissions Data Loader.

Learn more in this [blog post](#).

Using Commissions Data Loader to Extract Payments

In addition to uploading data from source systems, Commissions Data Loader can also be configured to extract payment data for integration with payroll and accounts payable systems. This has the added advantage of allowing the administrator to customize the output to meet the needs of the target system.

Before creating an outbound configuration, the user should have access to the following:

- Permission to run a Pipeline
- A file explorer that allows a connection to the tenant database, such as WebIDE, Hana Studio, or Eclipse
- The ability to create Custom Tables and Custom Stored Procedures on the tenant database
- If using Secure FTP for the file transfer, access to the Outbound folder on SFTP dropbox
- RestAPI v2 and Odata API Access for debugging

To create an outbound configuration in Commissions Data Loader:

- Using WebIDE or another HANA database access application, create a custom table containing the attributes to extract. For this example, this table will be called PAYMENTEXTRACT.
- Create a stored procedure to extract the data. For this example, the stored procedure will be called EXTRACTPAYMENTS.
- Go to Configuration – File Type Setup and create an extract configuration.
- Select the Outbound tab
- Create a new File Type using the + sign on the Toolbar
- In the Create New File Type dialog box:

- Set the type to Outbound
- Enter the source PAYMENTEXTRACT
- Enter an optional description
- Enter the output file type txt
- Enter the source PAYMENTEXTRACT
- Enter the Source Stored Procedure EXTRACTPAYMENTS
- Leave the Compression Mode at the default
- Set the Character set (Charset) to Utf-8
- Set the delimiter to Tab
- Set the Header switch to Yes

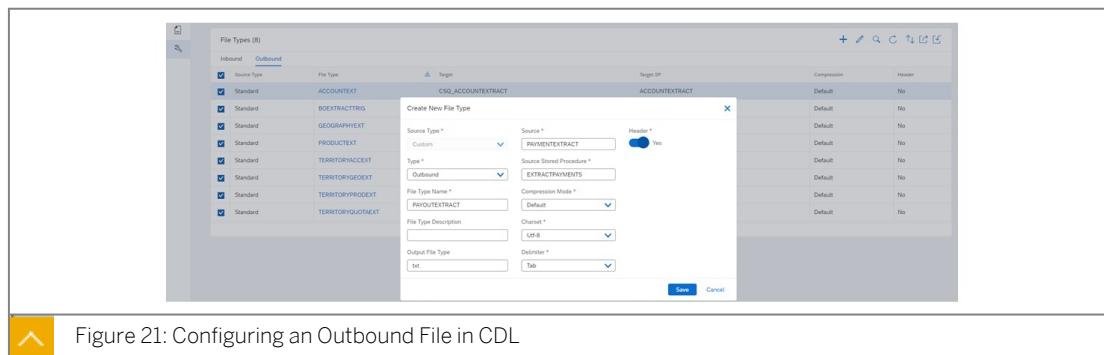


Figure 21: Configuring an Outbound File in CDL

- Run a Pipeline for the Data Extract Stage. For the Data Extract, enter the name of the custom table. In this example, we use PAYMENTEXTRACT.

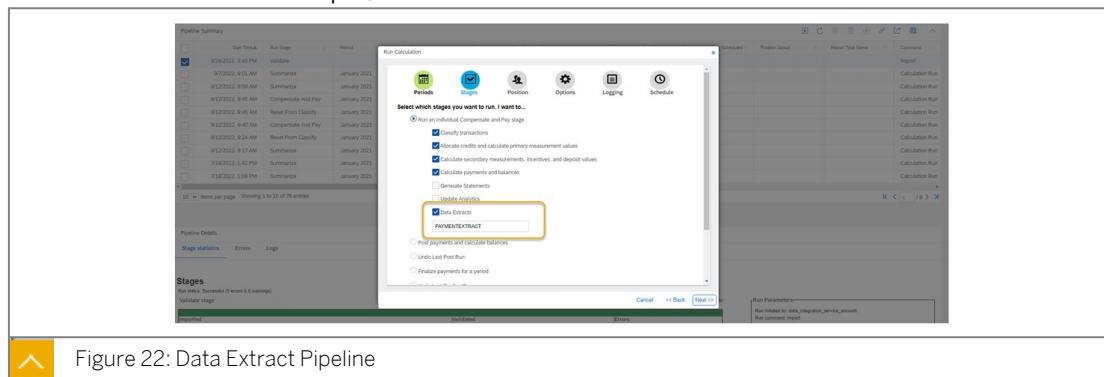


Figure 22: Data Extract Pipeline

Learn more about outbound file transfers in this [blog post](#).

Best Practices for Data Integration

- Excel Data Loaders are used for ad hoc data loads on the end user level. It is not designed for high volume data transfers.
- The Commissions Data Loader is an ideal solution for small to medium sized businesses. This tool is included with SAP Commissions and uses a graphical user interface to upload high volumes of data.
- Smart Data Integration (SDI) is designed for high data volume and data transformation. It uses Web IDE, a graphical tool, used to define flowgraphs for data transformations.



LESSON SUMMARY

You should now be able to:

- Determine the best data integration option for an implementation
- Configure an integration scenario using Commissions Data Loader (CDL)
- Upload data using Commissions Data Loader (CDL)
- Use the validate and transfer pipeline task to import data from staging to production
- Purge import data
- Extract payment data from SAP Commissions using Commissions Data Loader (CDL)

Learning Assessment

1. What is the first task that should be completed in a new SAP Commissions implementation?

Choose the correct answer.

- A Configure the Calendar
- B Create global values
- C Run a Pipeline
- D Create Business Units

2. Which of the following scenarios would be resolved by creating multiple calendars?

Choose the correct answer.

- A It is not possible to have multiple calendars.
- B Bonuses are paid both quarterly and annually.
- C Some payees are compensated monthly while others are compensated weekly.
- D Some payees are compensated monthly while others are compensated quarterly.

3. Which Global Value is used to manage labels that describe the transaction?

Choose the correct answer.

- A Credit Type
- B Event Type
- C Earning Code
- D Reason Code

4. Which of the following is correct regarding Processing Units? (Three correct answers)

Choose the correct answers.

- A You can create as many Processing Units as needed.
- B Processing Units are defined by associating them with Business Units.
- C Using Processing Units increases system performance and security.
- D A Position can be assigned to multiple Processing Units.
- E Processing Units cannot be renamed.

5. Which of the following is true regarding Business Units? (Three correct answers)

Choose the correct answers.

- A Users can be assigned to multiple Business Units.
- B Elements that have no assigned Business Units are visible to all users.
- C Global data such as Event Types and Unit Types can be assigned to a Business Unit.
- D Positions can only be assigned to a single Business Unit.
- E Calculations can be run for a single Business Unit.

6. The object that represents a user's level of access to a workspace or action is a:

Choose the correct answer.

- A Role
- B Business Unit
- C Title
- D Permission

7. How would you enable the system to automatically apply a Business Unit whenever you create a new record?

Choose the correct answer.

- A Edit a Business Unit record and click Set Default.
- B Set the Default Business Unit in the User record.
- C Set the Default Business Unit in User Preferences
- D Set the Default Business Unit in System Preferences.

8. Which of the following are advantages of using Processing Units? (2 correct answers)

Choose the correct answers.

- A Less data storage is required .
- B Data can be calculated independent of Processing Units.
- C Calculations can be run on different schedules for different Business Units.
- D Calculations can be processed for subsets of data.

9. Which of the following can you do in the Customization workspace? (3 Correct answers)

Choose the correct answers.

- A Relabel an attribute
- B Change the default currency.
- C Set GDPR settings for Participant data.
- D Make an attribute required.
- E Activate Generic Numbers

10. Which of the following data integration options would be best for a small business with little to no internal technical resources?

Choose the correct answer.

- A Excel Data Loader
- B Commissions Data Loader
- C Cloud Platform Integration
- D REST APIs

11. Which types of data can be uploaded from the Organization Data template? (3 correct answers)

Choose the correct answers.

- A Transactions
- B Participants
- C Positions
- D Transaction Assignments
- E Position Assignments

12. Which of the following steps must be completed before data can be uploaded using Commissions Data Loader (CDL)? (2 correct answers)

Choose the correct answers.

- A Configure global settings in CDL.
- B Configure settings specific to different types of import files.
- C Create a custom table.
- D Configure outbound file settings.

13. Where can you find and download the CDL templates?

Choose the correct answer.

- A In the Data Integration workspace.
- B In the online help.
- C From the SAP Community.
- D From the Transactions workspace.

14. What is the Validate and Transfer pipeline task used for?

Choose the correct answer.

- A Import data from the stage tables to production tables.
- B Transfer plan and rule data from a development to a production system.
- C Calculate compensation results.
- D Export payment data to a payroll system.

15. Which of the following steps are used to configure CDL to extract payment data? (Three correct answers)

Choose the correct answers.

- A Create a custom table containing the attributes to extract.
- B Create a stored procedure to extract payment data.
- C Run Validate and Transfer to extract the data.
- D Create a new Inbound file type in CDL.
- E Run a Pipeline with the Data Extract switch checked.

16. Which of the following are advantages of purging import data from the stage tables? (Two correct answers)

Choose the correct answers.

- A Reduces the possibility of calculation errors.
- B Increased performance of data uploads.
- C Reduces the amount of stored data.
- D Reduces the duration of calculation runs.

UNIT 3

Working with Compensation Elements

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UNIT OBJECTIVES

- Manage organization data
- Search for records in a workspace
- Add an effective version to a participant record
- Create a custom roll relationship
- Manage classification data
- Create a category hierarchy

- Define and create compensation elements
- Create variables

Managing Organization Data



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Manage organization data
- Search for records in a workspace

Organization Data

Organization data includes Participants, Titles, Positions, and Relationships. This is where SAP Commissions stores information about the entities who are being compensated: the individuals who receive payments, the unique jobs that they do, and the titles they share.

While organization data can be created manually in the user interface, this data is more often imported from source systems in a production environment. As an organization changes over time, it will be necessary to create and modify organization data. These changes may include adding or removing participants, creating new positions, or changing the reporting structure when people transfer within departments, receive promotions, or leave the company.

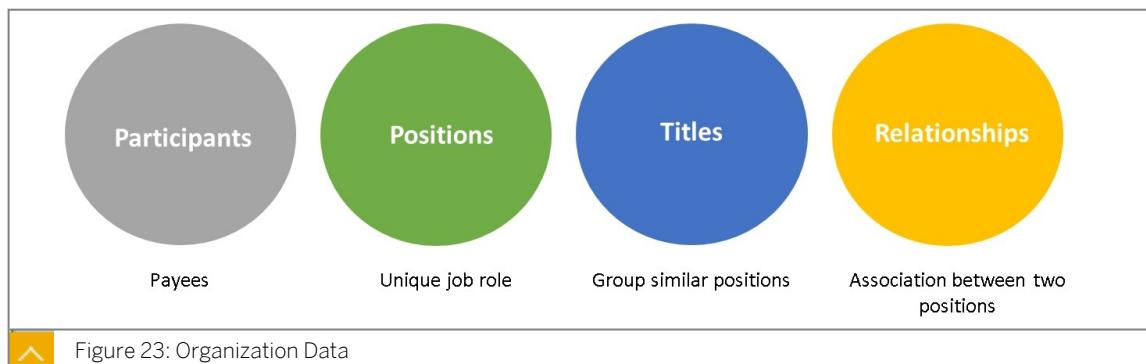


Figure 23: Organization Data

Participants	Participants refer to the entity being compensated. These can be individual people or entities that are included in incentive compensation programs within an organization. This can also include people or organizations that have access to compensation-related reports but are not receiving compensation payments.
Positions	A Position is a unique job role in an organization. Positions can exist with or without an assigned Participant.

Titles	A Title is used to group Positions that are compensated in similar ways across the organization. Because of this, companies often assign compensation plans by Title.
Relationships	A Relationship is the association between two Positions used to process rolled credits.



Animation: Organization Data

For more information on *Organization Data*, please view the animation in the lesson *Managing Organization Data* in your online course.

Participants

A Participant is the entity that is compensated in a plan. While generally a participant is an individual, it can also be a team or group. Participants can be internal or external to the organization.

A Participant record can also represent other stakeholders, such as approvers who need to be included in a process workflow, and others who need access to dashboards or reports.

The Participant record contains all information that pertains to the Participant, such as the name, base salary, and hire date. The Last Name and Participant ID fields are required fields.

General Information for Participants includes the following:

- First and Last Name
- Payee ID
- User Name
- Base Salary
- Hire and Termination Dates

Every Participant has a User Name. If the participant record is saved or loaded without populating the User Name field, the record automatically populates the User Name with the Participant ID. If the organization is using Single Sign-On, the User Name should be the same as the user's system login.

Use Generic Attributes to store additional Participant information as needed.

Best Practices for Participants

- Determine the Username/User ID format before adding Participants to the system.
- Do not use a Username/User ID that may change.
- With Single Sign-On, use the User ID used by the Company's current systems.
- Ending Participants is not recommended. If a participant leaves the organization, remove them from their assigned position, but leave their record active in the system. This makes it easier to find their record if needed.

- Use a Generic Date to represent the end of the Participant's employment and use this date in rule logic instead of the Termination Date. This is because once the termination date is past, the user is automatically locked out of the system.

Positions

The Position contains information about the unique job that is being compensated. Compensation is calculated in the context of the Position, not the Participant. As a result, the Position record is more important than the Participant or the Title, although all three are required.

A few points regarding positions are:

- Positions define specific jobs that participants perform within a company.
- One participant can be assigned to multiple positions.
- One Position can have only one Participant assigned.
- If no Participant is assigned to a Position, the Position won't receive compensation.
- Each Position in SAP Commissions is grouped under a Title.

Position Groups

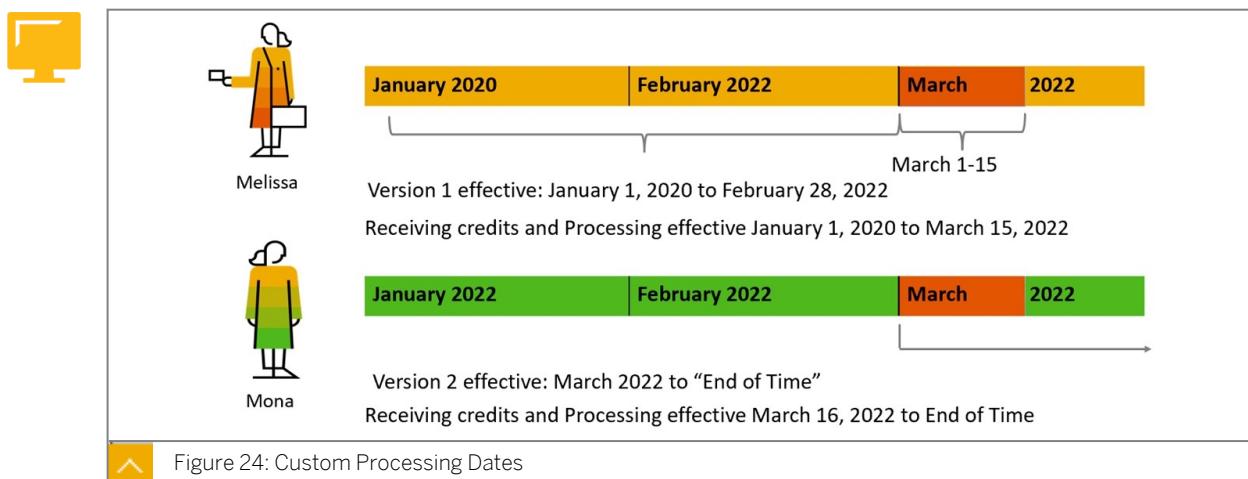
The *Position Group* field on the position record is not required. However, it is a useful feature that is used in most implementations. Use this field to group together positions by a value other than the title. This is useful for filtering data in compensation rules, and for running pipelines for subsets of positions. For example, you may want to have different position groups to differentiate sales teams, or teams in different corporate offices.

This field is a dropdown list that is populated as a Global Value.

Custom Processing Dates

The Position record has four fields that are used to fine-tune the start and end dates for Position Assignments: Credit Start, Credit End, Processing Start, and Processing End. Use these fields in cases where the dates that a participant is compensated does not correspond to the dates in which they hold the position.

Let's look at an example of a Position called SR-South. Melissa is leaving the position, and Mona is replacing her. Melissa should receive credits and payments for fifteen days after she leaves the position, during which time both participants should receive credits and payments. To make this work, the following would be configured:



Melissa is assigned to SR-South with the following effective dates:

- SR-South version 1 is effective January 1, 2020 to February 28, 2022.
- Melissa is receiving credits and processing effective January 1, 2020 to March 15, 2022

Mona is assigned to SR-South with the following effective dates:

- SR-South version 2 is effective March 1, 2022 to End Of Time.
- Version 2 is receiving credits and processing effective March 16, 2022 to End Of Time.

In the March 2022 period, both Melissa and Mona receive credits based on transactions with compensation dates between March 1 and March 15. For transactions that have compensation dates after March 16, only Mona receives credits.

It would appear this would create an overlap in the first half of March, but the custom credit and processing dates prevent this by specifying the exact dates in which each participant is compensated.

Best Practices for Positions

- Avoid changing position names over time. The position name is the unique key identifier for a Position. If the position name changes, errors can occur when loading variable assignments and quotas, and running the calculation.
- Custom Credit/Processing dates should only be used for exceptions. If these need to be modified regularly, automated loads that are programmed to set the dates appropriately is highly recommended. Otherwise, Position maintenance can become overwhelming.
- Don't assign Positions directly to a Plan. Instead, assign the Title to a Plan and allow the Position to inherit the plan assignment.
- Set up Position Groups for your Positions from the start, so that if you ever need to, you can Post and Finalize by a Position Group. Position Groups should not be groupings that would change frequently.

Titles

Titles are used to group similar positions across the organization and usually group positions related to job functions.

As an example, Sales Representatives in an organization might share the same title, but each sales representative may hold a unique position, such as Sales Rep Northwest or Sales Rep Hardware Products.

Generally, all payees who are compensated in similar ways can share a compensation plan, so compensation plans are assigned on the Title level rather than on the Position level.

The Detail pane of the Titles workspace contains two core tabs: General Information and Assignments. If generic attributes have been enabled for Titles, a custom fields section is also displayed in the Titles detail pane.

The General Information tab contains the Title Name, Business Unit, Plan, and Description.

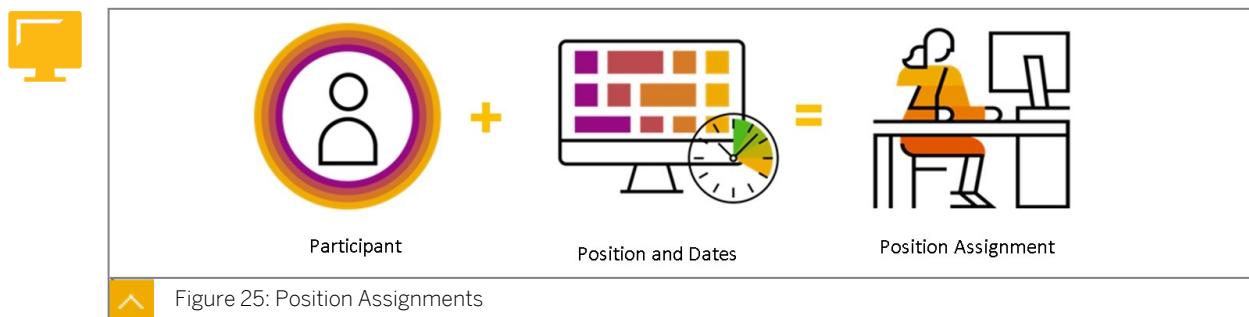
Position Assignments

A Position Assignment is the assignment of a Participant to a Position for a period of time. Compensation is calculated in the context of the Position Assignment. During the compensation process, credits, commissions and bonuses, and deposits are allocated to position assignments. Position assignments can also be imported.

Let's look at an example of a Position Assignment. Stacy Palowski is hired as a Sales Rep for the Central Region starting in January 2022. We create a Participant record which contains her identifying information, hire date, base salary and any other information needed for compensation. We also create a Position record with the position name, title, manager, and position group.

To create the Position Assignment, we populate the Participant field with Stacy's name. This creates an association with her participant record and ensures that she is compensated for sales.

What happens if we leave the Participant field blank? The system assumes the position is empty and won't calculate compensation for sales by that position.



Unit 3

Exercise 7

Exercise: Create Organization Data

Business Example

Bikes In Motion has hired a new Product Sales Rep to help with the growing European market. In this exercise, you will create a Participant and Position that will be compensated in our plan. You will then assign the Position to the existing Sales Representative Title.



Simulation

For more information on this topic please view the simulation in the lesson *Managing Organization Data* in your online course.

1. Create a Participant.
2. Create a new Position called Product Sales Representative Europe 2.

Unit 3 Solution 7

Exercise: Create Organization Data

Business Example

Bikes In Motion has hired a new Product Sales Rep to help with the growing European market. In this exercise, you will create a Participant and Position that will be compensated in our plan. You will then assign the Position to the existing Sales Representative Title.



Simulation

For more information on this topic please view the simulation in the lesson *Managing Organization Data* in your online course.

1. Create a Participant.
 - a) Open the Participants workspace.
 - b) Select the Add icon.
 - c) Select the default effective dates and select OK.
 - d) Enter PA-1134 for the Participant ID.
 - e) Type in Carlos Ortiz for the participant's first and last Name.
 - f) Select 01/17/2022 for the Hire Date.
 - g) Enter \$40,000 for the Base Salary.
 - h) Enter the Sales Status as BRONZE.
 - i) Enter No in GB1: Bonus Eligibility.
 - j) Set the Bonus Level to 3 and set the unit type to Integer.
 - k) Select Create.
2. Create a new Position called Product Sales Representative Europe 2.
 - a) Open the Positions workspace.
 - b) Click the Add icon.
 - c) Select the default effective dates and select OK.
 - d) Type SR-EMEA2 for the Position Name.
 - e) Add the description Sales Representative – Europe 2.
 - f) Select *Sales Representative* for the Title.
 - g) Set the Manager to RSD-EMEA.

- h) Select Carlos Ortiz as the Participant.
- i) Set the Position Group to EMEA.
- j) Click Save.

Searching for Records In a Workspace

SAP Commissions has several options to search for records.

- **Quick Search** is the easiest way to find records in the current workspace using standard fields. To use Quick Search, Select the magnifying glass icon on the toolbar to open the search field, type in a value, and Select the icon again.
- **Advanced Search** has two modes: Basic Mode and Advanced Mode. To open Advanced Search, Select the funnel icon on the toolbar.
- **Basic Mode** allows you to perform more complex searches, including setting multiple criteria and preset sort orders, in a graphical user interface.
- **Advanced Mode** uses a SQL-like syntax to perform more complex queries. In addition to the options available in Basic Mode, you can search across multiple workspaces and combine *And* and *Or* criteria.

Both modes of Advanced Search can be saved and set as the default search for a workspace.



Step 2: Define Search Criteria

Basic Mode

All Search Criteria (AND) Any Search Criteria (OR) Ignore Case In Text Fields

Choose Business Unit (optional):

Field Name	Comparison	Value
Compensation Date	greater than or equal to	9/1/2021
GA1: Product Group	equals	Bikes

Step 3: Define Sort Criteria

Field Name	Order
Value	Descending

Figure 26: Advanced Search Basic Mode

Watch the video on '[Using Advanced Search in SAP Commissions](#)'.



Step 2: Define Search Criteria

Advanced Mode

Ignore Case In Text Fields

Choose Business Unit (optional):

Transaction.Comp Date > 9/1/2021 And (Transaction.GA1: Product Group = "Bikes" Or Transaction.GA1: Product Group = "Apparel")

Figure 27: Advanced Search Advanced Mode

Unit 3

Exercise 8

Exercise: Search for Records In a Workspace

Business Example

In this exercise, you'll use simple, advanced and related searches to find data in a workspace.



Simulation

For more information on this topic please view the simulation in the lesson *Managing Organization Data* in your online course.

1. Use Simple Search to find a Participant named Greg Chen.
2. Use Advanced Search to find all Transactions in January 2022 with a value higher than \$10,000.
3. Use Related Search to find all Positions assigned to the Regional Director title.

Unit 3 Solution 8

Exercise: Search for Records In a Workspace

Business Example

In this exercise, you'll use simple, advanced and related searches to find data in a workspace.



Simulation

For more information on this topic please view the simulation in the lesson *Managing Organization Data* in your online course.

1. Use Simple Search to find a Participant named Greg Chen.
 - a) Open the Participants workspace and verify the Default Period is set to January 2022.
 - b) Select the magnifying glass to reveal the Quick Search field.
 - c) Enter *Chen* and Select the magnifying glass again to perform the search.
 2. Use Advanced Search to find all Transactions in January 2022 with a value higher than \$10,000.
 - a) Open the Transactions workspace from the Calculations menu
 - b) Verify the *No Default Period Filter* is checked.
 - c) Select the Advanced Search icon (looks like a funnel) at the top of the page.
 - d) In the Field Name, Select the dropdown and select *Compensation Date*.
 - e) In the Comparision field, select *Between*.
 - f) In the *Value*, enter *1/1/2022* in the *From* field enter *1/31/2022* in the to field.
 - g) Click the plus (+) sign to add a new criteria.
 - h) Select a value greater than 10,000 USD.
 - i) Select *Apply*.
 - j) Clear the search by selecting the Quick Search (magnifying glass) icon twice.
 3. Use Related Search to find all Positions assigned to the Regional Director title.
 - a) From the organization menu, select *Titles*.
 - b) Select the *Regional Director* title.
 - c) On the toolbar, mouse over the *Related Search* icon.
 - d) Select *Position* from the menu.
- All the positions returned have the Regional Director title.



LESSON SUMMARY

You should now be able to:

- Manage organization data
- Search for records in a workspace

Unit 3

Lesson 2

Managing Versions and Effective Dates



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Add an effective version to a participant record

Versions and Effective Dates

When working with compensation, the date in which values change can have a major effect on payouts.

Let's look at the following example. A Sales Representative named Terry Callahan has a base salary of USD\$80,000, and a compensation plan that pays an annual bonus of 5% of this amount. If Terry's base salary increases to \$85,000, the date in which the change takes place is critical if his bonus payout is to be accurate.

When you create a new record, such as a new participant or plan, you are prompted for the effective start and end date for the first version. You can then create new versions of the object as needed. Creating new versions retains the old versions for auditing purposes.

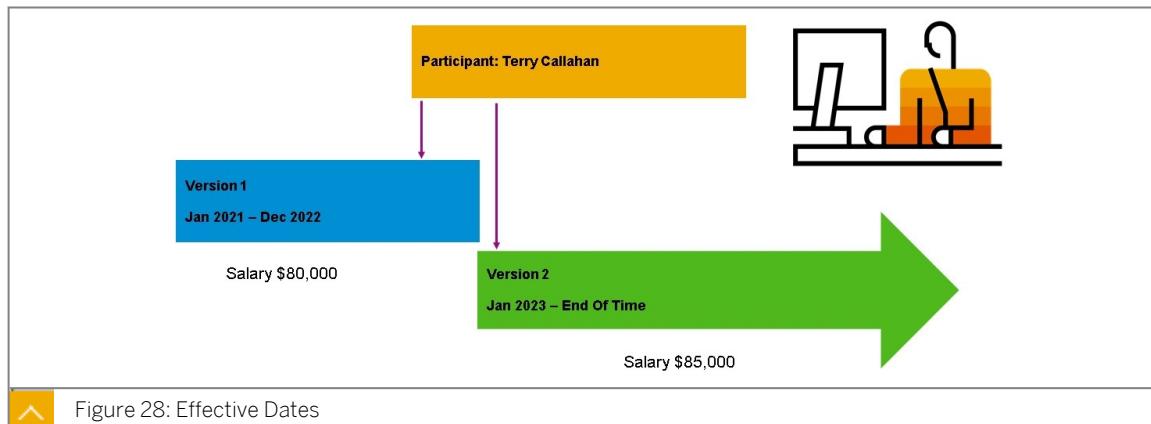


Figure 28: Effective Dates

We do this by ensuring that changes take place on a specific date through versions and effective dates. Effective dates set the date range within which an object's version is active or valid in the system. The effective date range of an object's version is determined by the start and end dates of that version.

The table below shows which objects are effective dated and which are not.

Effective dated objects	Non – effective dated objects
Organization data (Participants, Positions, Titles, Relationships)	Calendars
Classification data (Categories and Classifiers)	Global data (event types, credit types, unit types, position groups, etc.)

Compensation elements (Territories, Fixed Values, Rate Tables, Formulas, Lookup Tables)	Processing units
Variables	Security data (users, roles, business units)
Plan data (Plans and Rules)	Transactions
Results data (Credits, Measurements, Incentives, Deposits, Payments)	

Creating A New Version Of a Record

To create a new version of a record, or to edit an existing version:

- Select the record in the workspace
- Click the Manage Versions icon on the toolbar



- To create a new version, in the Edit Version dialog box, click the + sign in the upper left and enter the effective start and end dates for the new version.
- To edit an existing version, select from the list of versions in the left pane.
- Make any changes or additions.
- Click OK.



Figure 29: Adding an Effective Version



Video: Managing Position Assignment Versions

For more information on *Managing Position Assignment Versions*, please view the video in the lesson *Managing Versions and Effective Dates* in your online course.

Watch the video on '[Managing Position Assignment Versions](#)'.

Best Practices For Effective Dates And Versioning

- Plans and Plan Objects should only be versioned on a Leaf Period Boundary. This means new versions should not take effect mid-period.
- Version your organization data on a Leaf Period Boundary. You can use Generic Dates to store specific dates that are needed in Rule logic.

- When retiring a position, do not end date it; instead, deactivate it. To deactivate a Position, create a new version and remove the participant from the Position.
- If a Rule is not being used anymore, you can end date it. If it could be used again, create a new version of the Plan, and remove that rule from the object from that point forward.
- Always clarify the Effective Start date of any requested change into a system before making it.



LESSON SUMMARY

You should now be able to:

- Add an effective version to a participant record

Unit 3

Lesson 3

Using Roll Relationships



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a custom roll relationship

Roll Relationships

A Roll Relationship is an association between two Positions.

As you create positions, populating the Manager field creates a roll relationship between the current position and the manager's position. If this is done consistently for all positions, the entire reporting structure for the sales organization is created. This can be used for a number of purposes when calculating compensation.



The image above shows an example of how transaction credits can be rolled from a subordinate position, such as a sales rep, to a manager or director. In this case, using relationships, we can use a compensation plan to compensate sales managers for the performance of their team.

In some cases, your business may need to roll credits from the original sales rep to another payee who is not their manager. This can be configured by creating custom roll relationships. The Relationships workspace provides an interface to create and manage custom Roll Relationships.



Video

For more information on this topic please view the video in the lesson *Using Roll Relationships* in your online course.

Watch the video on '[Working with Custom Roll Relationships](#)'.



LESSON SUMMARY

You should now be able to:

- Create a custom roll relationship

Managing Classification Data



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Manage classification data
- Create a category hierarchy

Classification Data

Classification data is used to organize transactions in a meaningful ways. This data is organized into a tree structure and used to group, classify, organize, and distribute sales transactions data. This ensures that sales reps are accurately compensated, and reporting is also accurate.

Categories and classifiers are used to sort and classify transactions. Classified transactions are allocated as credits to generate compensation, through the use of Territories.

During the calculation, the Pipeline will compare transaction fields and match them with classification rules. What's the advantage of classification data? Let's look at a few examples.

Scenario 1: Stacey is a Sales Rep that specializes in bike products in the western region of the US. Her territory includes the states of California, Arizona, and Nevada. The Postal Codes hierarchy will hold a list of US states and other geographical regions, and a classification rule that tells the system how to match a transaction with the correct state. We can then create a territory that contains the three states in the region, and assign Stacey to that territory.

Scenario 2: Each customer has a negotiated discount that differs for each account. Customer data is stored in the Customers hierarchy, and the discount is stored in a generic number field. The compensation plan finds the customer that matches the one on the transaction, extracts the negotiated discount, and uses it to calculate the commission.

Category Hierarchies

An implementation will generally have multiple hierarchies for different types of data. Different types of data are identified assigning different Classifier Types. Examples of classifier types are Products, Customers, and Postal Codes. These three classifier types appear by default, but you can also create new classifier types.

Category Hierarchies are made up of three levels of data:

- The Root Category
- Categories and Subcategories
- Classifiers



Video: Working with Classification Data in SAP Commissions

For more information on *Working with Classification Data in SAP Commissions*, please view the video in the lesson *Managing Classification Data* in your online course.

Watch the video on '[Working with Classification Data in SAP Commissions](#)'.

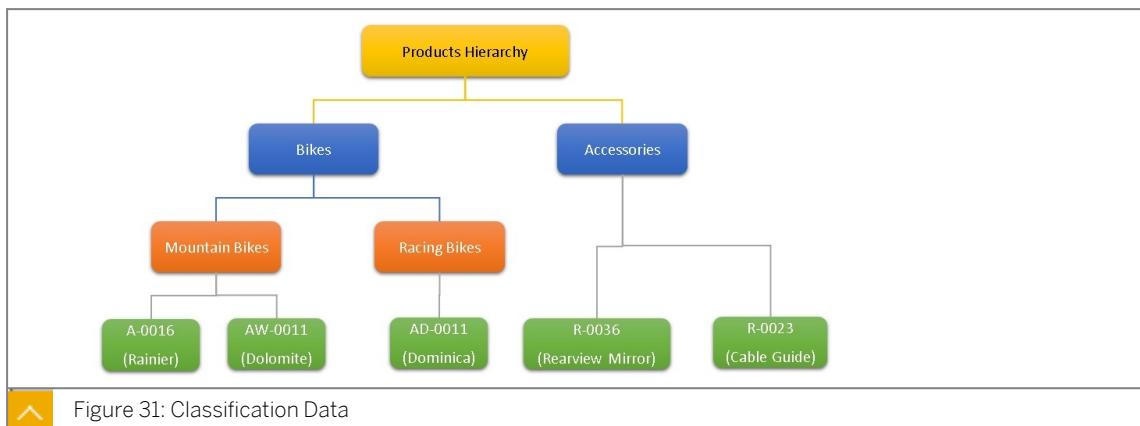


Figure 31: Classification Data



Animation: Classification Data

For more information on *Classification Data*, please view the animation in the lesson *Managing Classification Data* in your online course.

Products Hierarchy: Root Category

Bikes/Accessories: Category

Mountain Bikes/Racing Bikes: Subcategory

All green items: Classifier

The Root Category

The Root Category is a record at the top level of the Category Hierarchy. It has the role of defining the details of the hierarchy and contains three important pieces of information.

A Unique Name

The Classifier Type

The Classification Rule

Categories And Subcategories

Categories are used to group sales transactions in meaningful ways. The groupings determine how position assignments receive credits.

Categories are used to filter transactions into groups based on specific fields on each transaction. They are built in a hierarchical structure that can include multiple levels of sub-categories.

Classifiers

The Classifier is a generic term used to refer to the data used to classify transactions. The Classifier consists of the lowest level of the category hierarchy and represents the actual object that is being categorically organized, such as an individual product or customer.

Classifier Types

Every Category Hierarchy must have a Classifier Type which defines the type of data stored in the hierarchy. By default every system includes three classifier types: Product, Customer, and Postal Code. In addition, you can add generic classifier types if you need to classify transactions by another type of data.

Generic Classifier Types, like any Generic Attribute, can be created and maintained in the Customization workspace.

Classification Rules

The Classification Rule is a Boolean expression that matches a field on a classifier record with a field on a transaction. During calculation processing, the expression is processed for each transaction and it is determined whether the transaction has a matching classifier.

Figure 32: Classification Rule

The Classification Rule is the mechanism in which a unique identifier, such as a Product ID, is used to match a Classifier record to a Transaction being processed.

If the classification rule does not have an expression, it will not classify the transactions. After a category hierarchy is created, the classifier type cannot be changed.

The classification tree is defined by the Classification Rule. If this expression is left blank, the hierarchy will not classify transaction data.

How to Create a Classification Rule



Video

For more information on this topic please view the video in the lesson *Managing Classification Data* in your online course.

Watch the video on '[How to Create a Classification Rule](#)'.

Unit 3 Exercise 9

Exercise: Create a Category Hierarchy for Bike Products

Business Example

In this exercise, you will navigate the Category Hierarchies that we imported in the previous unit. You will also change the classification rule in the Postal Code hierarchy to meet the needs for Bikes in Motion.



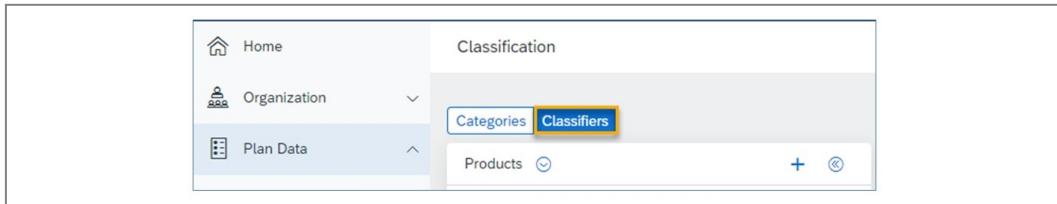
Simulation

For more information on this topic please view the simulation in the lesson *Managing Classification Data* in your online course.

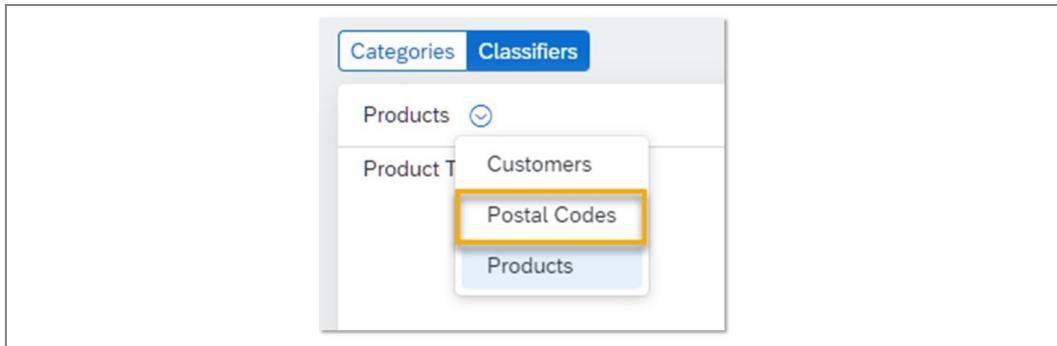
1. Open the Postal Code Tree.

- a. From the Plan Data menu, click *Classification*.

- b. Select the Classifiers button.



- c. Click the *Classification Type* drop down and select *Postal Codes*.



- d. Expand the Postal Code category hierarchy.

- Select *Postal Code Tree*
- Select *Regions*

- Select *Americas*
 - Select *Canada*
 - Note the list of classifiers in the right pane. Each classifier corresponds to a province.
 - Select *Alberta (AB)* to open the details for the classifier. Note the Postal Code ID contains the two letter abbreviation for the province.
2. Update the classification rule in the Postal Code tree to match the Postal Code ID with the State field on the Transaction billing address.

Unit 3 Solution 9

Exercise: Create a Category Hierarchy for Bike Products

Business Example

In this exercise, you will navigate the Category Hierarchies that we imported in the previous unit. You will also change the classification rule in the Postal Code hierarchy to meet the needs for Bikes in Motion.

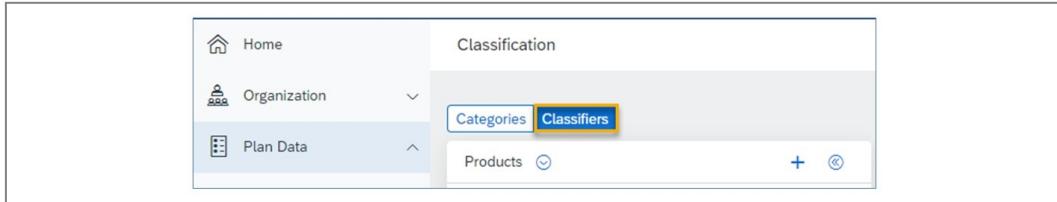


Simulation

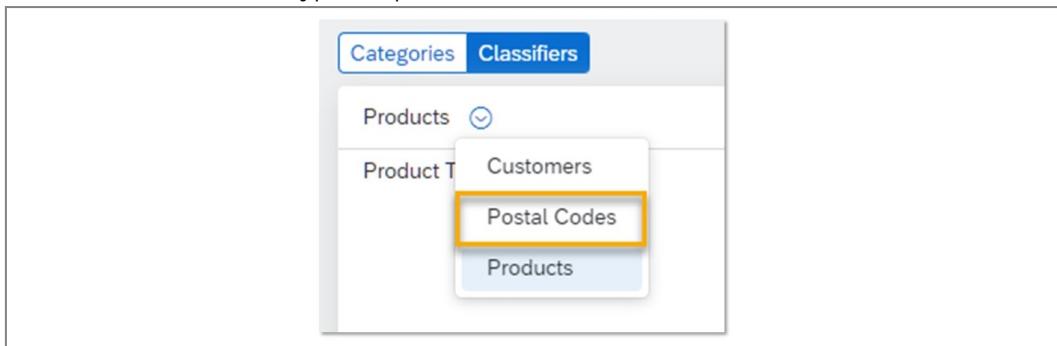
For more information on this topic please view the simulation in the lesson *Managing Classification Data* in your online course.

1. Open the Postal Code Tree.

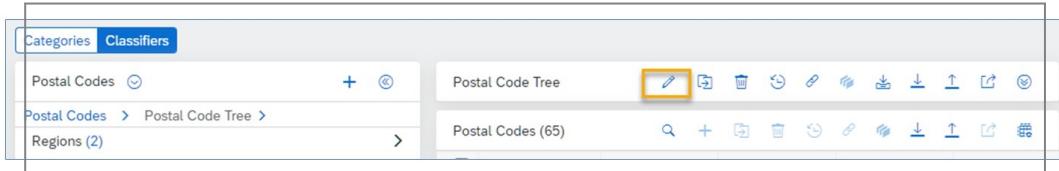
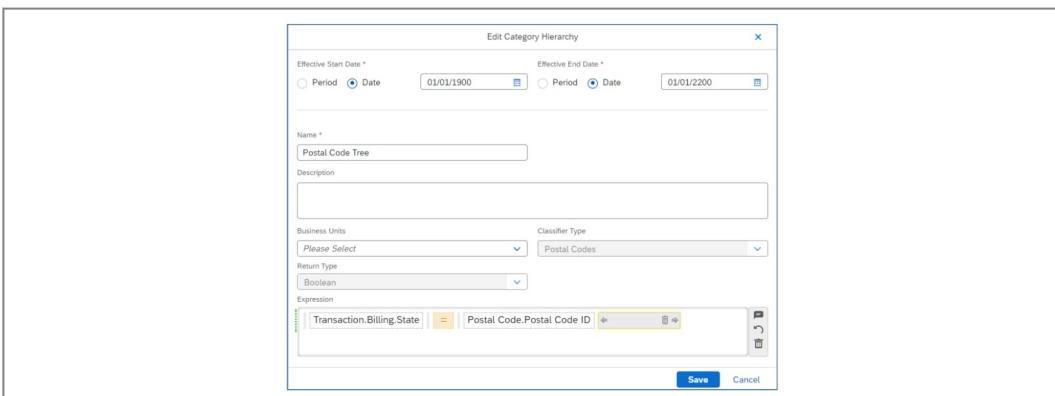
- a. From the Plan Data menu, click *Classification*.
- b. Select the Classifiers button.



- c. Click the *Classification Type* drop down and select *Postal Codes*.



- d. Expand the Postal Code category hierarchy.
 - Select *Postal Code Tree*
 - Select *Regions*

- Select *Americas*
 - Select *Canada*
 - Note the list of classifiers in the right pane. Each classifier corresponds to a province.
 - Select *Alberta (AB)* to open the details for the classifier. Note the Postal Code ID contains the two letter abbreviation for the province.
2. Update the classification rule in the Postal Code tree to match the Postal Code ID with the State field on the Transaction billing address.
- a) Open the Classification Rule.
 - In the Category box select *Postal Code Tree*.
 - Select the *Edit* icon in the Hierarchy Details pane.
 - b) Select the Expression box.
 - c) Edit the Classification Rule.
 - In the first placeholder, type *Tran* and select *Transaction.Billing.State*.
 - In the second placeholder, type *=* and select the equal sign (*=*).
 - In the third placeholder, type *Post* and select *Postal Code.Postal Code ID*.

- d) Select Save.

Best Practices for Classification

- Always have a classification rule in the category hierarchy.
- When creating a new classification rule, use a field that is both required and unique, such as the Product ID field, on the classifier.



LESSON SUMMARY

You should now be able to:

- Manage classification data
- Create a category hierarchy

Compensation elements



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Define and create compensation elements

Compensation Elements

Compensation Plan Elements, or simply Compensation Elements, are reusable objects that contain an expression or value. They make it easier to create and maintain compensation plans.

Compensation Elements merely store data. Until a Compensation Element is associated with a Rule, Variable, or Plan, it is not used in calculating compensation.

Access to Compensation Elements is available from the Plans menu. Each type of Compensation Element has its own workspace.

Naming Conventions

As we go through the next few lessons we will be creating many types of objects: fixed values, territories, variables, plans, and rules. While SAP Commissions does not have strict naming requirements, we will be using a widely accepted set of naming conventions.

- While spaces are allowed in SAP Commissions, we will substitute an underscore (_) for spaces.
- Each object is preceded by an acronym to identify the type of object. For example, territories are preceded by T_, and territory variables are preceded by TV_.
- Objects that can be periodic, such as a fixed value that contains a quarterly quota, will contain the period somewhere in the name, such as FV_Quarterly_Quota or FV_Quota_Q Quarter.
- Compensation plan rules are preceded with the type of rule. For example, a direct credit rule will be preceded by DCR_, and a deposit rule will be preceded by DR_.

Advantages of Compensation Elements

Compensation Elements store data that can be used in rules. They have three advantages that simplify the management of rules:

- They allow the encapsulation of data in distinct objects rather than storing everything in a large, complex compensation plan.
- They have special abilities that allow certain tasks to be accomplished easily.
- They are Effective Dated, which makes it easier to manage changes in plans.

Types of Compensation Elements

SAP Commissions has the following compensation elements:



Animation

For more information on this topic please view the animation in the lesson *Compensation elements* in your online course.

- Territories
- Fixed Values
- Rate Tables
- Lookup Tables
- Quotas
- Formulas
- Variables

Territories

A Territory is a named object defined by groups of categories and classifiers that is used to filter input to credit and primary measurement rules.

Territories filter transactions based on how they are classified. They can be used for a number of scenarios, but a common one is to allocate credit for a Transaction to a payee based on a criterion, such as the location, product or customer type.

Consider the scenario we saw earlier. Stacey Palowski, the Sales Rep for the western region, should get credit for any transaction in the US states of California, Nevada, or Arizona. Let's add one more criteria: the transactions must also be for sales of bike products or accessories, but not repair services.

Stacey's territory would be defined using the data in the category hierarchy we saw in the previous topic, and would look like (Bike Products OR Accessories) AND Western Region.

Territories:

Are defined using Categories and Classifiers.

Can be simple or complex.

Can be referenced in Credit or Primary Measurement Rules.

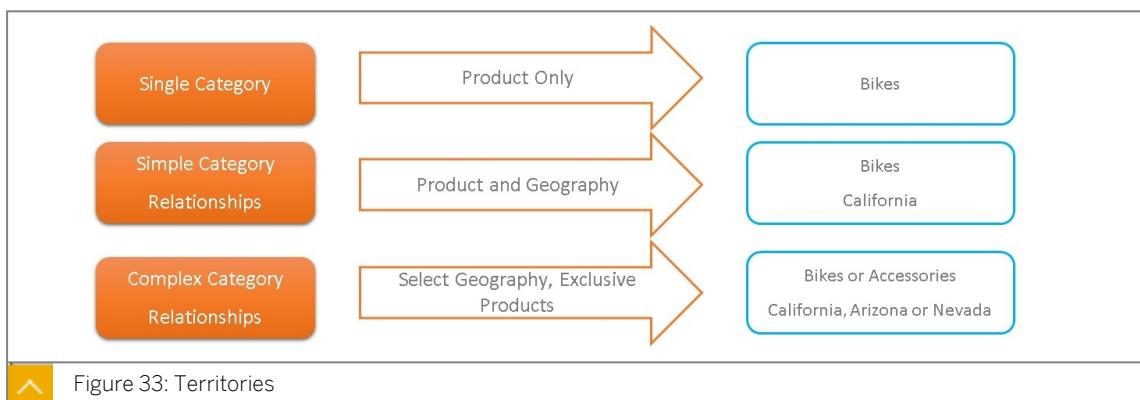


Figure 33: Territories



Video: Territories in Relation to Classification Data

For more information on *Territories in Relation to Classification Data*, please view the video in the lesson *Compensation elements* in your online course.

Watch the video on '[Territories in Relation to Classification Data](#)'.

Best Practices for Territories

- Use Parenthesis and Logical order of operations to make sure the statement is logically processed.
 - For an AND condition, both parts must be true for the territory to succeed.
 - For an OR condition, the match succeeds if either clause is true.
- Never leave a Territory object Blank, this will cause errors in the pipeline.
- Have a “dummy” Territory that evaluates as FALSE. You can then use this territory as the default for variables, which will prevent an error if a variable is not assigned.

Fixed Values

Fixed values store static period-specific numeric values.

Fixed Values:

- Can be effective dated, allowing you to create a new version when values change instead of versioning the entire plan or rule.
- Can have a Period Type that allow you to preset values for different periods in a single record.
- Can be referenced in many other objects, including Formulas, Rules, Rate Tables or Lookup Tables.

Let's look at two examples in which Fixed Values can be used in a plan.

Scenario 1: Quarterly Bonus

Bikes In Motion pays a quarterly bonus of \$1000 to all Sales Reps that meet their quarterly quota. The bonus does not change over time, but it may be adjusted in the future. Storing the bonus in a Fixed Value allows you to create a new version of the bonus if the amount changes without having to change the compensation plan.

Scenario 2: Quarterly Sales Quota

While the bonus amount is the same for all quarters, sales of bikes are very seasonal, so the sales quota changes with the seasons. The quota is low in the first quarter of the year, when temperatures are cold in the US and Canada. In Q2, the weather is warmer, and bike shops are ordering stock for the Summer months. As a result, the quota will be much higher in Q2 and Q3. In Q4, the holiday gift-giving season may mean a high quota as well.

As a result, our quarterly sales quotas might look like this:

- Q1: \$75,000
- Q2: \$175,000
- Q3: \$300,000
- Q4: \$150,000

To make a fixed value periodic, set the period type to quarter. This will allow you to enter a separate entry field for each quarter.

Best Practices for Fixed Values

- Only use a period specific fixed value if you are certain the Client does not allow that value to change mid-period. If they do, it is better to use a non-period specific Fixed Value, and version it when it changes.
- In period specific fixed values, be sure to populate every period of the current fiscal year with a value (do not leave null) or it will create errors in the pipeline.
- Have a process documented to ensure that fixed values are populated each year.
- Use a variable when referencing a fixed value in a rule. Avoid hard coding a fixed value into a rule or plan object.

Rate Table

A Rate Table is a special-purpose table used to hold a matrix of commission rates. Use a rate table in cases where the commission rate increases as achievement crosses thresholds.

Rate Tables:

- Can calculate per-credit or aggregate credit commissions
- Are built with numeric values, fixed values, formulas, or values from data fields.
- Depend on the selections in the Incentive rule to make calculations
- Can be used in multiple rules.
- Can be effective dated



Video: Working with Rate Tables in SAP Commissions

For more information on *Working with Rate Tables in SAP Commissions*, please view the video in the lesson *Compensation elements* in your online course.

Watch the video on [Working with rate tables in SAP Commissions](#) for more information.

Attainment

To understand rate tables, it's helpful to understand what Attainment means in this context. Attainment is, put simply, achievement as a percent of quota or target. For example, if a sales quota is US\$100,000 and a payee achieves total sales of \$104,000, attainment is 104%.

The rate table then holds a list of rates for ranges of attainment.

Rate tables are generally used in Incentive Rules. The rule can calculate attainment and look up the rate, based on that attainment, in a rate table.

Step Commission vs. Straight Commission

Commission rates can be evaluated two ways: Step and Straight.

When Step Commission is used, the commission rate steps up as the payee reaches each attainment threshold. In contrast, when straight commission is used, only a single commission rate is applied at the final attainment threshold.

Figure 27: Step vs. Straight Commission in Rate Tables



Attainment		Rate
<=100%		3%
>100%		5%
Option 1: Step Commission		
Example: 104% Quota Attainment	Sales up to 100% pay at base rate All additional sales pay at high rate	(100 at 3%) + (4% at 5%)
Option 2: Straight Commission		
Example: 104% Quota Attainment	Sales are paid at the rate in which attainment was achieved	(104% at 5%)

Figure 34: Step vs. Straight Commission in Rate Tables

Let's look at the above example of a rate table that pays a 3% commission for sales below 100% attainment and 5% for sales above 100%. Using step commission, all sales up to 100% of quota are compensated at 3%, and only the remaining 4% of sales are paid out at the higher rate. In contrast, if straight commission is used, the full amount is paid out at the higher rate.

Step Commission is more complex than straight commission but is more common. A single rate table can be used to calculate both step and straight commission, depending on the settings in the rule.

Best Practices for Rate Tables

- Don't leave the rates in a rate table blank.
- Use a variable when referencing a rate table in a rule. Avoid hard coding a rate table into a rule or plan object.

Lookup Tables

Lookup Tables are customized tables that house values based on multiple sets of criteria, where the output value represents the intersection of multiple dimensions.

Lookup Tables:

- Contain a table of values based on multiple sets of criteria where the stored values represent the intersection of multiple dimensions.
- Are also known as Multi-Dimension Lookup Tables (or MDLTs) and locate values as a result of the intersection of multiple dimensions or axes.
- Are constructed using dimensions and indices
- Can be populated manually or through data loads.

Let's look at the image below as an example. In this case, the Region, Products, and Sales Status are the Dimensions.



Region	Americas		EMEA	
Product Line	Bikes	Accessories	Bikes	Accessories
Sales Status	Gold	8%	9%	7%
	Silver	6%	7%	4%
	Bronze	4%	5%	3%

Figure 35: Lookup Tables

This Lookup Table tells the system the commission rate is 4%, when the Region is EMEA, the Product is Bikes, and the Sales Status is Silver. The value returned can be used in the Incentive Rule.



Video: Creating Lookup Tables in SAP Commissions

For more information on *Creating Lookup Tables in SAP Commissions*, please view the video in the lesson *Compensation elements* in your online course.

Watch the video on '[Creating Lookup Tables in SAP Commissions](#)'.

Lookup Tables vs Rate Tables

Some similarities exist between Lookup Tables and Rate Tables. The matrix below shows the differences and similarities between the two and may help you decide when to use each one.

Rate Tables	Lookup Tables
Easy to set up	Complex initial setup
Handles step commission	Does not handle step commission
Only calculates commission rates based on attainment or a calculated result.	Can calculate any numeric value based on any input of any data type including strings and categories
Can only be used in Incentive Rules	Can be used in any rule or formula
Can be effective dated	Each individual cell in the matrix can be effective dated.

Best Practices for Lookup Tables

- Map out your lookup table before creating them.
- If you leave values null, check the box to make all null values zero or use conditioning to ensure a rule does not attempt to calculate using a null value.
- Avoid many nested Lookup Table references. Keep them as simple as possible.
- Use Lookup Tables when the list of indices is relatively static.

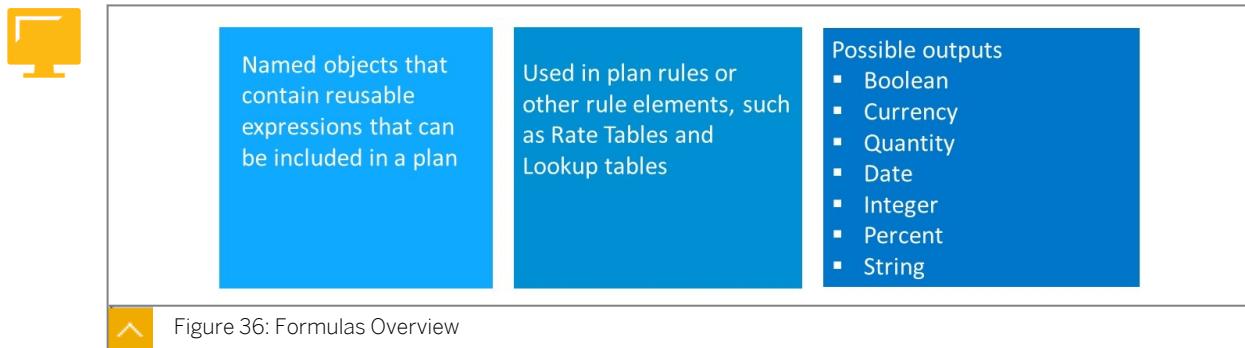
Formulas

Formulas are reusable objects that contain an expression, such as a mathematical equation. A formula can be used in compensation rules, rate tables, lookup tables, and other formulas.

Formulas can reference many other objects, such as fixed values, lookup tables, values from data fields, and other formulas. Formulas can have the following output types:

- Currency
- Boolean
- Date
- Integer
- Percent
- Quantity

- String



Because you can add many types of input to a Formula, the Rule Usage box displays the types of rules in which the Formula can be used, depending on where the data is coming from.

Figure 37: Creating a Formula

Functions

Functions are predefined formulas that you can use to calculate and specify values or conditions. SAP Commissions includes a large number of functions of different types, such as date functions, sum functions, and text functions. When using a function, you will be prompted for the parameters the function requires.

Some common functions you may use may include:

- Concatenate Two Strings (string1, string2)
 - Combines two text strings into a single string.
 - Output type: string
 - Example: Concatenate Two Strings (Participant.First Name, Participant.Last Name)
- isNull (string)
 - Test if a field has no value
 - Output type: Boolean
 - Example: isNull (Transaction.Channel)
- Fiscal Date (Period Type, Period Offset, Start Date or End Date)
 - Returns the start or end date of a fiscal period, such as a month
 - Output type: date

- Example: Fiscal Date (Month, 0, End Date)



Video: Measuring Time and Sum Results Functions in SAP Commissions

For more information on *Measuring Time and Sum Results Functions in SAP Commissions*, please view the video in the lesson *Compensation elements* in your online course.

Watch the video on '[Measuring Time and Sum Results Functions in SAP Commissions](#)'.

Best Practices for Formulas and Functions

- Keep formulas readable and straight forward.
- Use the Description field to describe what the formula does.
- Don't leave a formula expression blank. Instead, populate with a value that returns nothing in the result, depending on the result type. For example if the formula has a Boolean result, populate the formula with false.

Quotas

Earlier, we saw that quotas can be stored in a Fixed Value. Another way to store quotas is in the Quota object, a type of compensation element used to store multiple quotas across the organization for multiple periods. When creating a Quota, you can select the time frame for which the quota is applicable, and enter different values for each individual position assignment and period.

Ideally, Quotas are good for smaller organizations, or smaller teams within a larger organization.

The image below shows an example of a Quota that contains quarterly and yearly sales goals for Regional Directors.



Quota Summary																																																					
Name	Business Unit	Description	Unit Type	Last Modified																																																	
Regional Director Quo...	Any BusinessUnit		USD	9/29/2022, 1:13 PM																																																	
10 items per page Showing 1 to 1 of 1 entries																																																					
Quota Details																																																					
General Information Quota Values																																																					
<div style="display: flex; align-items: center;"> Search <input style="margin: 0 10px;" type="text"/> Period: 2021 Change </div>																																																					
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Figure 38: Quotas

Unit 3 Exercise 10

Exercise: Create Compensation Elements

Business Example

In this exercise, you will create the compensation elements that will be used in the compensation plan. This includes territories, fixed values, rate tables, lookup tables, and formulas.



Simulation

For more information on this topic please view the simulation in the lesson *Compensation elements* in your online course.

1. Create two Territories: Americas and EMEA.
2. Create Fixed Values to contain the quarterly bonus and quarterly quotas for Sales Representatives.
3. Create a rate table.

All Sales Reps will share a rate table in our plan. You will create a rate table for the sales representatives that will calculate a 2% commission on sales below quota and a 3% commission on sales above quota.



Simulation: Create a rate table

For more information on *Create a rate table*, please view the simulation in the lesson *Compensation elements* in your online course.

4. Create a lookup table.

In this step, you will create a lookup table that uses two different input values to calculate the bonus amount that should be paid to each participant. This will use two custom fields enabled in the Participant record: GA1: Sales Status and GN1: Bonus Level.

LT_Bonus Lookup		USD	BikesInMotion	
Sales Status (String)	Bonus Level (Numeric, Integer)			
	1	2	3	4
GOLD	\$5000	\$4000	\$3000	\$2000
SILVER	\$3500	\$2500	\$1500	\$500
BRONZE	\$1500	\$1200	\$500	\$0



Simulation

For more information on this topic please view the simulation in the lesson *Compensation elements* in your online course.

5. Create formulas.

In this step, you will create two formulas that reference a lookup table to calculate the amount of the annual bonus. Since lookup tables need an exact date, you will first create a Formula that uses the Fiscal Date function to extract the last day of the current month. You will then create a Formula that references the lookup table created in the previous step.



Simulation

For more information on this topic please view the simulation in the lesson *Compensation elements* in your online course.

Unit 3

Solution 10

Exercise: Create Compensation Elements

Business Example

In this exercise, you will create the compensation elements that will be used in the compensation plan. This includes territories, fixed values, rate tables, lookup tables, and formulas.

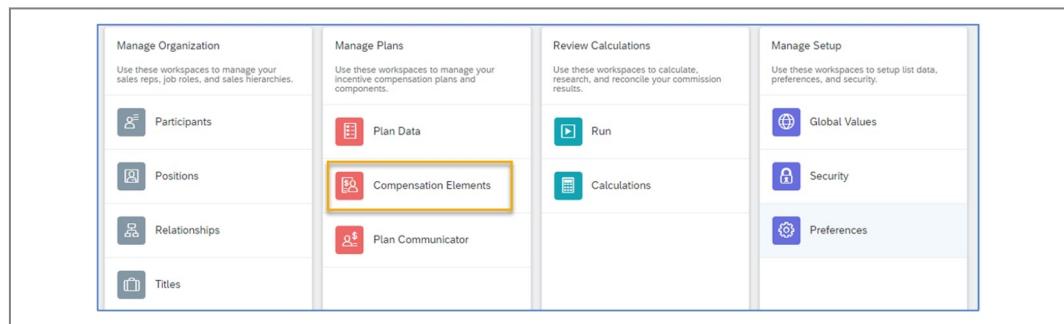


Simulation

For more information on this topic please view the simulation in the lesson *Compensation elements* in your online course.

1. Create two Territories: Americas and EMEA.

- From the home page, select *Compensation Elements* in the Manage plans tile.



- Click *Territories*.
- Click the *Add* icon.
- Click *OK* to accept the default Effective Dates.
- Type T_Americas in the Name field in the Territory Details pane.
- Select *BikesInMotion* for the business unit .
- Set this Territory to reference all products under the Bikes Category:
 - Click the first placeholder in the Expression box within the Territory box in the Territory Details pane.
 - Type Category and select reference: Category.
 - In the same placeholder, enter Bikes, then select Category: Bikes: Bike Products Tree.

The screenshot shows the 'Territory Details' screen in a software application. At the top right are 'Save' and 'Cancel' buttons. Below them is a tab bar with 'General Information' selected and 'Associations'. Under 'Standard Fields', there are fields for 'Name' (T_Americas), 'Business Unit' (BikesInMotion), 'Description' (empty), and 'Last Modified' (1/12/2023, 4:18 PM). Below this is a section titled 'Territory' with a 'Expression' field containing 'Americas:Postal Code Tree'. There are also icons for copy, paste, and delete.

- Click Create to save the Territory.
 - Repeat the steps above to create a second Territory called T_EMEA. In the Expression box, reference Category, then reference EMEA:Postal Code Tree.
2. Create Fixed Values to contain the quarterly bonus and quarterly quotas for Sales Representatives.
- a) Create a Fixed Value to hold a \$1000 quarterly bonus for the Sales Reps.
- Select *Compensation Elements – Fixed Values* in the Manage Plans tile.
 - Select the Add icon.
 - Accept the Default Effective Dates.
 - Type *FV_Sales_Bonus* in the Name field.
 - Type *Quarterly Sales Bonus* in the Description field.
 - Select *BikesInMotion* for the Business Unit.
 - Leave the Period Type empty.
 - Enter the value \$1000 and set the Unit Type to USD.

The screenshot shows the 'Fixed Value Details' screen. At the top right are 'Save' and 'Cancel' buttons. Below them is a tab bar with 'General Information' selected and 'Associations'. Under 'Standard Fields', there are fields for 'Name' (FV_Sales_Bonus), 'Description' (empty), 'Calendar' (Main Monthly Calendar), 'Business Unit' (BikesInMotion), and 'Effective Start Date' (1/1/2022). The 'Fixed Value Type' dropdown is open. Below this is a 'Fixed Value' section with a value of '\$1,000.00' and a unit type of 'USD'.

- Select Save
- b) Create a Fixed Value to hold the quarterly quota amounts for the Sales Reps.
- Select the Add icon.
- Accept the Default Effective Dates.

- Type FV_Quarterly_Sales_Quota in the Name field.
- Type Quarterly Sales Quota in the Description field.
- Select BikesInMotion for the Business Unit.
- Set the Period Type to Quarter.
- Enter the following values, setting the unit type to USD:
 - §Q1: \$75,000
 - §Q2: \$175,000
 - §Q3: \$300,000
 - §Q4: \$150,000

Select Save.

Fixed Value Dates	Fixed Values
Q1 2022	\$75,000.00 USD
Q2 2022	\$175,000.00 USD
Q3 2022	\$300,000.00 USD
Q4 2022	\$150,000.00 USD

3. Create a rate table.

All Sales Reps will share a rate table in our plan. You will create a rate table for the sales representatives that will calculate a 2% commission on sales below quota and a 3% commission on sales above quota.



Simulation: Create a rate table

For more information on *Create a rate table*, please view the simulation in the lesson *Compensation elements* in your online course.

- Select *Compensation Elements - Rate Tables* from the Manage Plans tile.
- Select the Add icon and accept the default effective dates.
- In the name field type *RT_Commission Rates*.
- Select *Percent* for the input and return types.
- In the Rate Table section, enter the following for the two levels:
 - In row 1 select (\leq) less than or equal to sign under the operator column.
 - In row 1 type 100% for the Attainment column and type 3% in the Rate column.
 - In row 2 select ($>$) greater than sign under the operator column.

- In row 2 type 100% for the Attainment column and type 5% in the Rate column.

The screenshot shows a compensation element configuration screen. At the top, there are fields for Name (RT_Commission Rates), Business Unit (BikesInMotion), Description, and Calendar (Main Monthly Calendar). Below these are fields for Input Type (percent), Return Type (percent), Last Modified (10/6/2022, 10:52 AM), and Effective Start Date (1/1/2020). The main area is titled 'Rate Table' and contains a table with two rows. The table has columns for Operator (< and >=), Attainment (100%), and Rate (3% and 5%). Action buttons (+ and edit) are available for each row.

f) Select Create.

4. Create a lookup table.

In this step, you will create a lookup table that uses two different input values to calculate the bonus amount that should be paid to each participant. This will use two custom fields enabled in the Participant record: GA1: Sales Status and GN1: Bonus Level.

LT_Bonus Lookup		USD	BikesInMotion	
Sales Status (String)	Bonus Level (Numeric, Integer)			
	1	2	3	4
GOLD	\$5000	\$4000	\$3000	\$2000
SILVER	\$3500	\$2500	\$1500	\$500
BRONZE	\$1500	\$1200	\$500	\$0



Simulation

For more information on this topic please view the simulation in the lesson *Compensation elements* in your online course.

- Select *Compensation Elements – Lookup Tables* from the Manage Plans tile.
- Select the Add icon and accept the default effective dates.
- Enter the standard fields:
 - Name: LT_Bonus_Lookup
 - Return Type: USD
 - Treat Empty Values as Zero: Check this box
- Enter a dimension for the sales status.
 - Click the Add icon in the Lookup Table Structure section.
 - Enter the Dimension name Sales Status.

- Set the type to String.
 - Select *Finish*.
- e) Add Indices to the Dimension with values GOLD, SILVER and BRONZE.
- In the Define Indices section, click the New icon.
 - Enter the value GOLD.
 - Leave the Effective Dates at the default and select Finish.
- f) Repeat these steps to add two more index values for SILVER and BRONZE, being sure to enter the values in all caps.
- g) Use the same steps as above to add a Dimension called Bonus Level with the following settings:
- Type: Numeric
 - Input Unit Type: Integer
- h) Add the Index values for the Bonus Level dimension.
- Select on the new icon on the *Define Indices* window.
 - Set the value to 1/Integer
 - Repeat these steps to add the values 2,3, and 4.

Select Save.

- i) Add the Values to the table.
- Select the Value tab.
 - Select the Edit (pencil) button.
 - Enter the values as shown in the table on the previous page.
 - Save changes to the Lookup Table.

5. Create formulas.

In this step, you will create two formulas that reference a lookup table to calculate the amount of the annual bonus. Since lookup tables need an exact date, you will first create a Formula that uses the Fiscal Date function to extract the last day of the current month. You will then create a Formula that references the lookup table created in the previous step.



Simulation

For more information on this topic please view the simulation in the lesson *Compensation elements* in your online course.

- a) Create the Formula to extract the last day of the current month.
- Select *Compensation Elements – Formulas* from the Manage Plans tile.
 - Select the New icon and accept the default Effective Dates.
 - Name the Formula F_LastDayOfPeriod.
 - Set the Return Type to Date.
 - Open the Window Editor.
-
- Click the Function button and select *function:Fiscal Date*.
 - In the Period Type parameter, type per and select *reference:Period Type* from the list.
 - In the flashing cursor after the colon, type mo and select *month*.
 - In the Period Offset parameter, enter 0 and set the unit type to integer.
 - In the last parameter, enter End and select *End Date* from the list.
 - Select the checkmark to close the window.
 - Select *Create*.
- b) Create a Formula called F_Bonus_Lookup that calculates the bonus using the Lookup Table. In this formula, we will tell the Lookup Table where to retrieve the three parameters: Date, Sales Status and Bonus Level.
- Select the New icon and accept the default Effective Dates.
 - Name the Formula F_Bonus_Lookup.
 - Set the Return Type to *Currency*.
 - Open the Window Editor.
 - Select Reference and select *reference: Lookup Table* from the list.
 - Type LT and select *LT_Bonus Lookup* from the list.

- In the Date parameter, type For and select *reference:Formula* from the list.
- Type *f_* and select *F_LastDayOfPeriod* from the list.

**Note:**

This is the formula you created in the previous step.

- In the Sales Status parameter, type part and select *Participant.GA1 :Sales Status*.
- In the Bonus Level parameter, type part and select *Participant.GN1 :Bonus Level*.
- Select the checkmark to close the window.
- Select *Create*.
- Your formula should look like this:

The screenshot shows the SAP Fiori interface for creating a formula. In the 'Standard Fields' section, the name is set to 'F_Bonus_Lookup'. Under the 'Formula' section, the 'Rule Usage' dropdown is set to 'Direct Transaction Credit, Rolled Transaction Credit, Direct Order Credit, Rolled Order Credit, Primary Measurement, Secondary Measurement, Incentive, Aggregate Commission, Dimensional Formula, Product Line'. The 'Expression' field contains the formula: 'L_Bonus_Lookup (F_LastDayOfPeriod, Participant.GA1: Sales Status, Participant.GN1: Bonus Level)'. The 'Return Type' dropdown is set to 'Currency'.



LESSON SUMMARY

You should now be able to:

- Define and create compensation elements

Unit 3

Lesson 6

Variables



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create variables

Variables

Variables are placeholders used in a rule in place of a Territory, Fixed Value, Rate Table or Lookup Table. Without variables, you would have to create a separate rule whenever one Position uses a different value than another.

Let's look at an example of the use of variables in a plan. In the image below, we have a single compensation plan with a set of rules. Our two Sales Reps, Terry and Amy, can both use the plan even though each has different territories, rates, and bonus amounts. We do this by inserting variables in the rules, where they act as placeholders.



Animation: Overview of Variables

For more information on *Overview of Variables*, please view the animation in the lesson *Variables* in your online course.



Figure 39: Using Variables to Add Flexibility to a Plan

Use the following steps to include Variables in your plans:

1. Create or import Compensation Elements such as variables and fixed values.
2. Create a Variable for each type of Compensation Element
3. Add the Variable in place of the Compensation Element in the Rules
4. Assign the Variable to a Compensation Element on the Plan, Title or Position level in the Compensation Plan details



Video: Introduction to Variables

For more information on *Introduction to Variables*, please view the video in the lesson *Variables* in your online course.

Watch the video on '[Introduction to Variables](#)'.

Unit 3 Exercise 11

Exercise: Create Variables

Business Example



Simulation: Create Variables

For more information on *Create Variables*, please view the simulation in the lesson *Variables* in your online course.

In this exercise, you will use Variables as placeholders for Territories, Fixed Values, and Rate Tables in our plan. We will need a Variable for each type of Compensation Element we created in the previous lab, using the following table as a guide.

	Type	Variable	Default
Sales Territory	Territory	TV_Sales_Territory	None
Quarterly Bonus	Fixed Value	FVV_Quarterly_Bonus	None
Commission Rates	Rate Table	RTV_Comm_Rates	RT_Commision_Rates

1. Create a Territory Variable.
2. Create the Fixed Value Variable for the Quarterly Bonus:
3. Create the Rate Table Variable for the commission rates and set it to default to the Rate Table we created in the previous lab.

Unit 3

Solution 11

Exercise: Create Variables

Business Example



Simulation: Create Variables

For more information on *Create Variables*, please view the simulation in the lesson *Variables* in your online course.

In this exercise, you will use Variables as placeholders for Territories, Fixed Values, and Rate Tables in our plan. We will need a Variable for each type of Compensation Element we created in the previous lab, using the following table as a guide.

	Type	Variable	Default
Sales Territory	Territory	TV_Sales_Territory	None
Quarterly Bonus	Fixed Value	FVV_Quarterly_Bonus	None
Commission Rates	Rate Table	RTV_Comm_Rates	RT_Commission_Rates

1. Create a Territory Variable.
 - a) From the Compensation Elements menu, select *Variables*.
 - b) From the Compensation Elements menu, select *Variables*.
 - c) Select the Create icon
 - d) Select Territory in the Type drop down menu.
 - e) Leave the default effective dates.
 - f) Select *OK*.
 - g) Type *TV_Sales_Territory* for the Variable Name.
 - h) Select *Create*.
2. Create the Fixed Value Variable for the Quarterly Bonus:
 - a) Select the Create icon.
 - b) Select Fixed Value in the Type drop down menu.
 - c) Leave the default effective dates.
 - d) Select *OK*.

- e) Type *FVV_Quarterly_Bonus* for the Variable Name.
 - f) Set the Return Type to Currency.
 - g) Leave all other fields at the default.
 - h) Select *Create*.
3. Create the Rate Table Variable for the commission rates and set it to default to the Rate Table we created in the previous lab.
- a) Select the Create icon.
 - b) Select Rate Table in the Type drop down menu.
 - c) Leave the default effective dates.
 - d) Select *OK*.
 - e) Type *RTV_Comm_Rates* for the Variable Name.
 - f) Set both the Input Type and Return Type to Percent.
 - g) In the Default field, select *RT_Commission_Rates*.
 - h) Select *Create*.

Best Practices for Variables

- Always set a default for each variable.
- If you don't have a default compensation element, create a "dummy" element with a null or false value and set this as the default.
- Always use a variable in a rule instead of referencing the compensation element directly. This will make your plans more scalable.



LESSON SUMMARY

You should now be able to:

- Create variables

Learning Assessment

1. Which of the following are required fields on the Participant record? (2 correct answers)

Choose the correct answers.

- A Participant ID
- B Last Name
- C Title
- D Termination Date

2. Multiple choice, single answer: Which type of compensation element contains an expression, such as a mathematical equation?

Choose the correct answer.

- A Territories
- B Formulas
- C Rate Tables
- D Quotas

3. Select the types of compensation elements that can use a variable as a placeholder. (2 correct answers)

Choose the correct answers.

- A Fixed Values
- B Rate Tables
- C Formulas
- D Quotas

4. You'd like to calculate a commission on sales that pays 1% of all sales below the quota, and 3% on all sales above the quota. Which type of compensation element would you use to store the rates?

Choose the correct answer.

- A Fixed Value
- B Quota
- C Rate Table
- D Formula

5. What term do we use to describe the assignment of a Participant to a Position for a period of time?

Choose the correct answer.

- A Position Assignment
- B Participant Assignment
- C Title
- D Plan

6. The fields on a participant record that define the dates in which the record is valid or effective are:

Choose the correct answer.

- A Effective Start Date and Effective End Date
- B Participant Start Date and Participant End Date
- C Version Start Date and Version End Date
- D Effective Date Range

7. What is the purpose of the Relationships workspace?

Choose the correct answer.

- A Provide an interface to create and manage custom Roll Relationships.
- B Create rules that roll credits from subordinates to managers.
- C Allow the administrator to manage the reporting hierarchy.
- D Determine whether credits and measurements are rollable.

8. Which of the following are components of a category hierarchy? (3 correct answers)

Choose the correct answers.

- A Root Category
- B Category
- C Classifier
- D Roll Type
- E Territory

9. What is the data type of a classification rule?

Choose the correct answer.

- A Boolean
- B Integer
- C String
- D Text

10. In which workspace can you create a new category hierarchy?

Choose the correct answer.

- A Classification
- B Hierarchies
- C Categories
- D Transaction

UNIT 4

Creating and Managing Compensation Plans

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UNIT OBJECTIVES

- Create a compensation plan analysis
- Name the steps of the process flow of a compensation plan

- Name the types of compensation plan rules
- Create a direct and indirect credit rule
- Create a primary measurement rule
- Create a secondary measurement rule
- Create incentive rules
- Create a per-credit commission incentive rule
- Create a deposit rule
- Describe the use of Earning Groups and Earning Codes
- Assign rule elements to variables in a compensation plan

Unit 4

Lesson 1

Analyzing Compensation Requirements



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a compensation plan analysis
- Name the steps of the process flow of a compensation plan

Compensation Plan Analysis

A compensation plan is an object that contains a set of rules that specify how to compensate each payee. The compensation plan contains many different components and elements. Using these rules, the compensation plan determines how transactions and orders are allocated, and how incentive earnings are calculated and paid out to the participant.

We've seen how Organization Data is created with participants, positions, and titles. We've also seen that a Position Assignment is the assignment of a participant to a position.

A Compensation Plan is typically assigned to the title as shown in the following diagram, although you can also assign a plan to an individual position. Data is always calculated in the context of a Position Assignment. This means for any given calculation, the system is looking at a single Position Assignment, and can access data from any of these objects. As a result, we can create a rule that pulls the Base Salary from the participant record, the position group from the position Record, or a Generic Attribute from any of these.

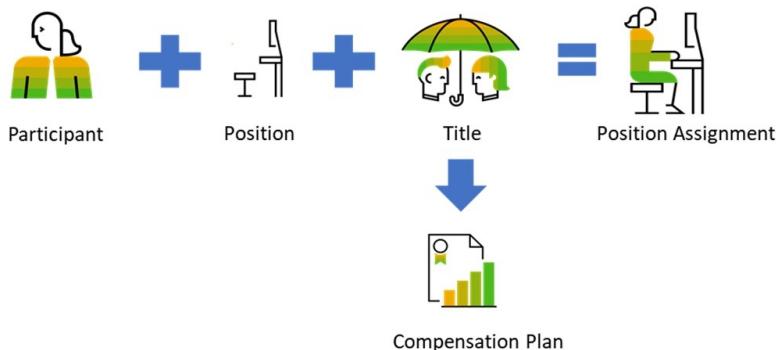


Figure 40: Compensation Plan

Typically, an organization will have multiple compensation plans that pay titles differently. For example, your organization may have different compensation plans for Sales Representatives, Sales Managers, Regional Directors and Account Executives. However, this doesn't mean that everyone on the plan has to be compensated in exactly the same way! As we go through this lesson, you'll see how you can add flexibility to a plan, so that payees can share a plan as long as they all use the same basic compensation structure.

Preparing the Design of a Compensation Plan

As with any development project, development begins with careful planning and documentation. As we go through the various components of a plan, you will see how the records and objects we have created work together to create the desired outputs.

Let's start with the basic steps to create a plan.

1. Identify the needed outcomes of the plan.
 - Work backwards from Incentive to credit to identify these needs
 - Document which values, conditions and formulas are needed.
2. Create the plan in the user interface.
3. Assign the plan to a Title.
 - This will link all Position Assignments under the Title to plan.
 - More efficient processing and easier to manage.
4. Build rules from Credit to Deposit based on identified needs.
5. Assign Rule Elements to Variables



Video: Best Practices When Designing Compensation Plans in SAP Commissions

For more information on *Best Practices When Designing Compensation Plans in SAP Commissions*, please view the video in the lesson *Analyzing Compensation Requirements* in your online course.

Watch the video on '[Best Practices When Designing Compensation Plans in SAP Commissions](#)'.

Some questions to ask when getting started are:

- How will transactions be differentiated?
Use Event Types to differentiate types of transactions
- Are credits going to roll within the organization?
Credits that will roll from one payee to another should have the rollable attribute checked on the credit rule.
- Will credits roll only through the reporting hierarchy, or will custom roll relationships exist?
If you are creating custom roll relationships (relationships not associated with the reporting hierarchy), create a new roll type and define the relationships before creating the credit rule.
- What Business Units are needed?
- We recommend always using at least one Business Unit, even for smaller organizations.
- How will transactions be credited to the payees?
- Transactions can be credited to a payee already identified on a transaction, using a territory, or using a custom condition.

- Will payees receive commissions, bonuses, or other types of incentives?
- Each of these types of incentives will be defined in the incentive rule.

Unit 4 Exercise 12

Exercise: Create and Assign a Compensation Plan

Business Example

In this exercise, you will create the plan that will calculate compensation for Bikes in Motion Sales Representatives, and assign the plan to the Sales Representative Title.



Simulation

For more information on this topic please view the simulation in the lesson *Analyzing Compensation Requirements* in your online course.

1. Create a Compensation Plan called 2022 Sales Representative Plan.
2. Assign the Plan to the Sales Representative title.

Unit 4 Solution 12

Exercise: Create and Assign a Compensation Plan

Business Example

In this exercise, you will create the plan that will calculate compensation for Bikes in Motion Sales Representatives, and assign the plan to the Sales Representative Title.



Simulation

For more information on this topic please view the simulation in the lesson *Analyzing Compensation Requirements* in your online course.

1. Create a Compensation Plan called 2022 Sales Representative Plan.
 - a) From the *Plan Data* icon, select *Plans Wizard*.
 - b) Select the *Add* icon.
 - c) Accept the default effective dates and select *OK*.
 - d) Type *2022 Sales Representative Plan* in the Name field.
 - e) Select *Create*.
2. Assign the Plan to the Sales Representative title.
 - a) From the *Manage Organization* tile, select *Titles*.
 - b) Select the *Sales Representative* title.
 - c) Select the *Edit* icon.
 - d) In the Plans, select *2022 Sales Representative Plan*.
 - e) Select *Save*.



LESSON SUMMARY

You should now be able to:

- Create a compensation plan analysis
- Name the steps of the process flow of a compensation plan

Unit 4

Lesson 2

Overview of Compensation Plan Rules



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Name the types of compensation plan rules

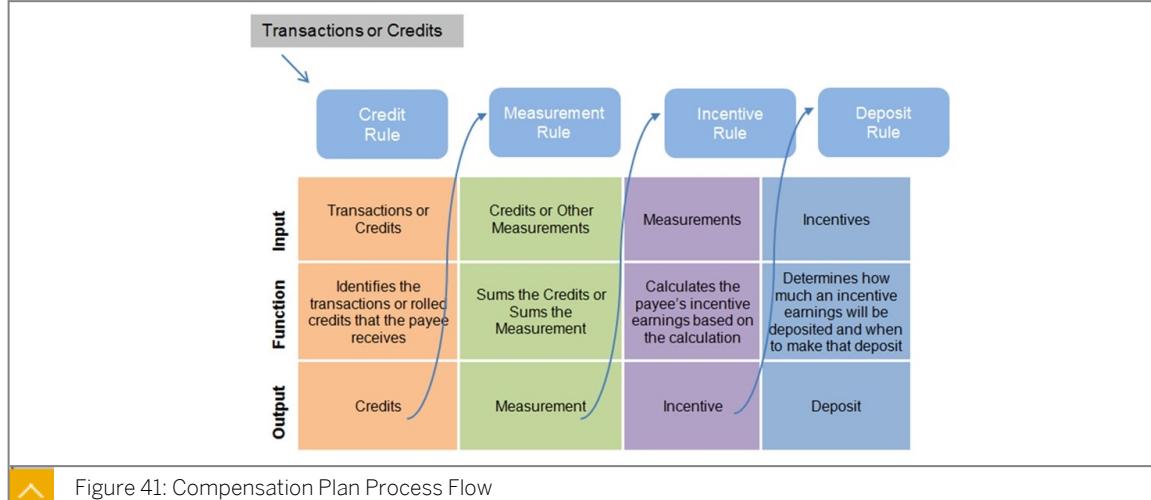
Compensation Plan Rules

A Compensation Rule is an object that includes inputs, condition criteria, function(s), and an output result. There are four rule types that can be used in a compensation plan: Credit Rules, Measurement Rules, Incentive Rules, and Deposit Rules.



Animation

For more information on this topic please view the animation in the lesson *Overview of Compensation Plan Rules* in your online course.



Each rule has an input, performs a function, and produces an output or Action. The output of a rule is used as the input of another rule. A rule can have multiple outputs.

Rules are always processed in order. This means that the calculation will start by processing credit rules, then measurement rules, and so on. Keep this in mind when designing your compensation plans.

Rules can be created in two ways.

1. Create the rules created independently of a plan in the Rules workspace, then added them to the plans as needed.

2. Create the rules directly in a plan, which automatically attaches the rule to the plan.

Each of these rules has many variations, but the following are some elements that all rules have in common.

- A unique name
- An optional description
- A condition that must be met for the rule to take effect. The result of the condition can be a value or an expression such as a formula, but the result must be Boolean. If the condition is left empty, the rule always takes effect.
- An output name, which populates the name of the object (credits, primary measurements, and so on) that is created by the rule.
- A display name for reports. This is the business-friendly name that appears on reports, dashboards, and analytics for end users to see.



LESSON SUMMARY

You should now be able to:

- Name the types of compensation plan rules

Unit 4

Lesson 3

Credit Rules



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a direct and indirect credit rule

Credit Rules

Credit Rules answer the question “who is getting credit for this transaction?”. Using the information we put in the rule, each transaction is analyzed, and a credit is created for each Position Assignment and period.

Direct Credit Rules

Credit rules can be Direct or Indirect. We'll start with direct credit rules, which allocate credits to position assignments, originating from a transaction.

Let's look at an example. Say that transaction 1618 has a date of January 12, 2022 and is preassigned to Position Assignment SR-C2 (Sales Rep Central - Joyce Fisher). When creating the credit rule, we would indicate that the transaction has been preassigned. This tells the system to find the name of the preassigned payee, create a new credit, allocate the credit to the payee, and designate the period as January 2022.

The following image shows how the credit rule is set to retrieve preassigned payees, and where to find this information in the transaction.

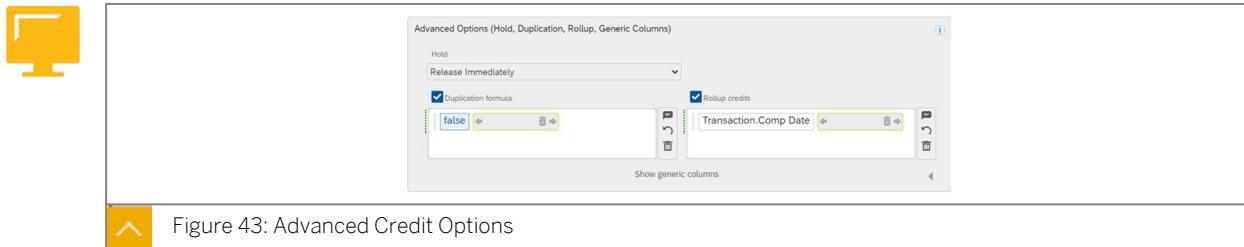


Figure 42: Preassigned Payees in a Credit Rule

Another way direct credits can be created is by using the territory we created in Unit 3. When using a territory, the transaction is not pre-allocated to a payee; instead, the rule looks at other information, such as the product or geographic region, to determine who gets the credit.

Advanced Options

The Advanced Options section of the credit output allows you to select optional settings for the credit. This includes Holds, Duplication Formula, and Rollup Credits.



Hold

By default, credits are released immediately. The Hold option allows you to place a hold on a credit until a specific period, a specific period type, or indefinitely until the credit is manually released.

Rollup Credits

If you make a credit rollable, ("Rollup Credits") the credit is able to roll in the direction you define in the indirect credit rule. It will roll as far as permissible up the reporting hierarchy or roll type hierarchy you defined. This is done by checking the Rollup Credits box in the credit output. We will learn more about rolled, or indirect, credits shortly.

Duplication Formula

The Duplication Formula is an expression that allows you to determine whether duplicate credits are allowed. A duplicate credit is a credit generated from the same transaction for a given Position Assignment, period, and credit type. When creating indirect credit rules, in some circumstances you may wish to allow duplicate credits. If so, change the setting to allow duplicates from FALSE to TRUE.

Unit 4

Exercise 13

Exercise: Create a Direct Credit Rule

Business Example

In this exercise, you will create a new Credit Rule that uses a Territory to assign Credits to our Sales Reps. Because our two Sales Reps have different sales Territories, you will use a Territory Variable as a placeholder, allowing us to use a single rule.



Simulation

For more information on this topic please view the simulation in the lesson *Credit Rules* in your online course.

1. From the Plans Wizard workspace select the *2022 Sales Representative Plan*.
2. Select the *Edit* icon in the Plan Details pane toolbar.
3. Select *Credit Rule* and then select *Create New Rule*.
4. Select Credit based on an individual transaction under “What Kind of Credit Rule do you want to create?”
5. Type *DCR_Sales_Credits* for the Name.

A screenshot of the SAP Fiori interface for creating a new Credit Rule. The screen shows the 'Rule Basics' step of the wizard. It asks 'What kind of Credit rule do you want to create?' with four options: 'Credit based on the entire Order' (radio button), 'Credit based on an individual Transaction' (radio button, selected), 'Credit based on a rolled Order Credit', and 'Credit based on a rolled Transaction Credit'. Below this, there are fields for 'Name' (set to 'DCR_Sales_Credits'), 'Business Unit' (set to 'BikesInMotion'), 'Description' (empty), 'Effective Dates' (set to 'January 2020' to 'End of Time'), 'Calendar' (set to 'Main Monthly Calendar'), and buttons for '<< Back', 'Next >>', 'Cancel', and 'Finish'.

6. Select *Next*.
7. Leave “Are there any conditions that need to be met?” blank.
8. Select *Next*.
9. Select the Editor window under *Credit if they have the following Territory*.
In the first placeholder, use the following steps to reference the Territory Variable:
 10. Type *ref* and select Reference: Territory Variable.
 11. Type *TV_* after the colon.
 12. Select *TV_Sales_Territory*.

13. Select Next.
14. Edit the Credit Output by selecting *Edit Credit Amount*.
15. Change the Output Name to *DC_Sales Credits*.
16. Select revenue for the Credit Type.
17. Verify the Amount is set to *Transaction.Value*.
18. Change the Display Name for Reports to *My Sales Credits*.
19. Click Next.
20. Select *Finish* to save the rule.

Rule Basics / Transactions / Credits / Output / Credit Amount /

What is the amount of the Credit?

Output Name: DC_Sales_Credits Credit Type: revenue

Amount: Transaction.Value

Display Name for Reports: My Sales Credits Reportable:

Advanced Options (Hold, Duplication, Rollup, Generic Columns)

<< Back Next >> Cancel Finish



Figure 44: Credit Rule Output

Unit 4

Solution 13

Exercise: Create a Direct Credit Rule

Business Example

In this exercise, you will create a new Credit Rule that uses a Territory to assign Credits to our Sales Reps. Because our two Sales Reps have different sales Territories, you will use a Territory Variable as a placeholder, allowing us to use a single rule.



Simulation

For more information on this topic please view the simulation in the lesson *Credit Rules* in your online course.

1. From the Plans Wizard workspace select the *2022 Sales Representative Plan*.
2. Select the *Edit* icon in the Plan Details pane toolbar.
3. Select *Credit Rule* and then select *Create New Rule*.
4. Select Credit based on an individual transaction under “What Kind of Credit Rule do you want to create?”
5. Type *DCR_Sales_Credits* for the Name.

The screenshot shows the SAP Fiori interface for creating a new credit rule. The 'Rule Basics' step is displayed. Under 'What kind of Credit rule do you want to create?', the 'Credit based on an individual Transaction' option is selected. The 'Name' field is filled with 'DCR_Sales_Credits'. The 'Business Unit' field shows 'BikesInMotion'. The 'Effective Dates' field is set from 'January 2020' to 'End of Time'. The 'Calendar' field is set to 'Main Monthly Calendar'. At the bottom, there are buttons for '<< Back', 'Next >>', 'Cancel', and 'Finish'.

6. Select *Next*.
7. Leave “Are there any conditions that need to be met?” blank.
8. Select *Next*.
9. Select the Editor window under *Credit if they have the following Territory*.
In the first placeholder, use the following steps to reference the Territory Variable:
 10. Type *ref* and select Reference: Territory Variable.
 11. Type *TV_* after the colon.
 12. Select *TV_Sales_Territory*.

13. Select Next.
14. Edit the Credit Output by selecting *Edit Credit Amount*.
15. Change the Output Name to *DC_Sales Credits*.
16. Select revenue for the Credit Type.
17. Verify the Amount is set to *Transaction.Value*.
18. Change the Display Name for Reports to *My Sales Credits*.
19. Click Next.
20. Select *Finish* to save the rule.

Rule Basics / Transactions / Credits / Output / Credit Amount /

What is the amount of the Credit?

Output Name: DC_Sales_Credits Credit Type: revenue

Amount: Transaction.Value

Display Name for Reports: My Sales Credits Reportable:

Advanced Options (Hold, Duplication, Rollup, Generic Columns)

<< Back Next >> Cancel Finish

Figure 44: Credit Rule Output

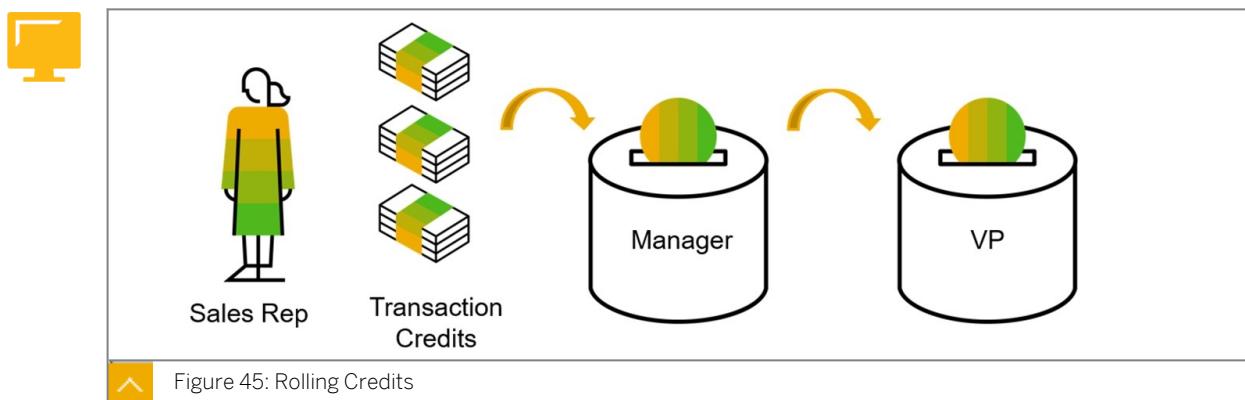
Indirect Credit Rules

Now that we've seen how direct credit rules allocate credits to payees based on transactions, let's turn our attention to indirect, or rolled, credit rules.

Indirect credit rules allow us to allocate credits to payees who are not directly involved in a sale, but who have a working relationship with a payee who is. The most common example of a recipient of an indirect credit is a sales manager, who is compensated based on the performance of their team. Custom roll relationships can also be created in the Relationships workspace to define relationships between other positions.

Example 1: Bikes In Motion wants to reward sales managers and the Vice President of Sales by paying a quarterly bonus if all Sales Representatives meet their quotas. The reporting relationship is maintained by populating the Manager field on each Sales Rep's Position record; this way, we know who reports to whom.

Example 2: The Account Executives are supported by a team of Sales Engineers. Each Sales Engineer receives a commission based on the performance of their assigned Account Executives. Custom roll relationships define the relationship between each Account Executive to their assigned Sales Engineer, and the credit rule will reference the custom roll type.



Video: Creating a Credit Rule which Uses Rolled Credits

For more information on *Creating a Credit Rule which Uses Rolled Credits*, please view the video in the lesson *Credit Rules* in your online course.

Watch the video on '[Creating a Credit Rule which Uses Rolled Credits](#)'.

To create an indirect credit rule:

1. On the Rule Basics tab, select Credit Based on a rolled Transaction Credit.



Note:

The name now starts with "ICR", short for Indirect Credit Rule.

What kind of Credit rule do you want to create?

- Credit based on the entire Order
- Credit based on an individual Transaction
- Credit based on a rolled Order Credit
- Credit based on a rolled Transaction Credit

Name: ICR_Rolled_Credits

Business Unit: BikesInMotion

Description:

Effective Dates: 1/1/2022 to 1/1/2020

Calendar: Main Monthly Calendar

Figure 46: Creating an Indirect Credit Rule - Basics

2. On the Credits tab, check the Rolling Through box.
3. In the field below, select the roll type. To roll credits using the reporting hierarchy, select Reporting.

Who should get the credits?

Rolling through:
 Reporting

Credit if they have the following Territory

A territory selection interface showing a tree view of territories, with a yellow box highlighting the selection area.

Figure 47: Creating an Indirect Credit Rule – Credits

4. On the Credit Amount tab, select a Credit Type. In this case, we selected Source Credit.
5. Set the amount to Source Credit.Value. Source Credit tells the rule to retrieve credits from source positions based on the reporting hierarchy. You can also customize the output amount using formulas or other input.

What is the amount of the Credit?

Output Name: IC_Rolled_Credits

Credit Type: Source Credit

Amount: Source Credit.Value

Display Name for Reports: My Team Credits

Reportable:

Advanced Options (Hold, Duplication, Rollup, Generic Columns)

Figure 48: Creating an Indirect Credit Rule - Output



LESSON SUMMARY

You should now be able to:

- Create a direct and indirect credit rule

Measurement Rules



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a primary measurement rule
- Create a secondary measurement rule

Primary Measurement Rules

If the credit rule has the job of allocating credits to payees, the measurement rule has the job of aggregating all credits for a single Position Assignment. This is called a Primary Measurement Rule.

In this case the Primary Measurement Rules aggregate credits for each Position Assignment. Primary Measurement rules are simple, but you can fine-tune them in several ways. For example, you may want to aggregate only credits that meet certain criteria. In this case, you can add a condition or territory to the rule.



Video: Creating Primary Measurement Rules

For more information on *Creating Primary Measurement Rules*, please view the video in the lesson *Measurement Rules* in your online course.

Watch the video on '[Creating Primary Measurement Rules](#)'.

Unit 4

Exercise 14

Exercise: Create a Primary Measurement Rule

Business Example

In this exercise, you will create a Primary Measurement rule that aggregates values for credits. In this lab, the primary measurement rule will use a filter to only include credits within the revenue credit type.



Simulation

For more information on this topic please view the simulation in the lesson *Measurement Rules* in your online course.

1. Select the *Measurement Rule* button.
2. Select *Create New Rule*.
3. Select *Primary Measurement Rule* under the *What kind of Measurement rule do you want to create?*
4. Type *PMR_Total_Sales_Revenue* in the Name field.
5. Enter a description, if desired.
6. Select *Next*.
7. Click the first conditions box to build the following condition.
8. Open the Window Editor using the balloon icon to the right of the condition field.
9. Type *cre* and select *Credit.Credit Type*.
10. From the comparison options select *=*.
11. Select *References* and select reference: *Credit Type*.
12. After the colon, type *rev*, then select *Credit Type:revenue* from the list.
13. Select the *checkmark* to close the window editor.
14. Select *Next*.
15. Select *Edit Measurement Amount*.
16. Change the output name to *PM_Total_Sales_Revenue*.
The output name is changed from *PMR* to *PM*. *PMR* stands for Primary Measurement Rule, while *PM* stands for Primary Measurement.
17. Confirm the Unit Type is set to USD.
18. Confirm the amount is set to *Credit.Value*.

19. Change the Display Name for Reports to *My Total Sales Revenue*.
20. Select *Next*, then *Finish*.

Unit 4 Solution 14

Exercise: Create a Primary Measurement Rule

Business Example

In this exercise, you will create a Primary Measurement rule that aggregates values for credits. In this lab, the primary measurement rule will use a filter to only include credits within the revenue credit type.



Simulation

For more information on this topic please view the simulation in the lesson *Measurement Rules* in your online course.

1. Select the *Measurement Rule* button.
2. Select *Create New Rule*.
3. Select *Primary Measurement Rule* under the *What kind of Measurement rule do you want to create?*
4. Type *PMR_Total_Sales_Revenue* in the Name field.
5. Enter a description, if desired.
6. Select *Next*.
7. Click the first conditions box to build the following condition.
8. Open the Window Editor using the balloon icon to the right of the condition field.
9. Type *cre* and select *Credit.Credit Type*.
10. From the comparison options select *=*.
11. Select *References* and select reference: *Credit Type*.
12. After the colon, type *rev*, then select *Credit Type:revenue* from the list.
13. Select the *checkmark* to close the window editor.
14. Select *Next*.
15. Select *Edit Measurement Amount*.
16. Change the output name to *PM_Total_Sales_Revenue*.
The output name is changed from *PMR* to *PM*. *PMR* stands for Primary Measurement Rule, while *PM* stands for Primary Measurement.
17. Confirm the Unit Type is set to USD.
18. Confirm the amount is set to *Credit.Value*.

19. Change the Display Name for Reports to *My Total Sales Revenue*.
20. Select *Next*, then *Finish*.

Measurement Rules

Secondary Measurement Rules perform additional calculations based on the Primary Measurement, to further manage the data for use in rules, dashboards, and analytics.

Some common uses for Secondary Measurements include:

- When calculating a compensation amount that doesn't require an Incentive Rule
- When you need to preserve a result for reporting or compensation purposes
- Examples:
 - Attainment rates
 - Prorating payouts
 - Aggregating Primary Measurements for a Quarter or Year

The following figure shows an example of the relationship between primary and secondary measurement rules. In this example, we need to use a secondary measurement to calculate attainment as the percent of quota for total sales. The secondary measurement rule is calculating attainment as the percent of quota for total sales. The primary measurement rule aggregates the four credits to come up with total sales of \$70. The secondary measurement rule then divides this by the \$100 quota to return an attainment of 70%.

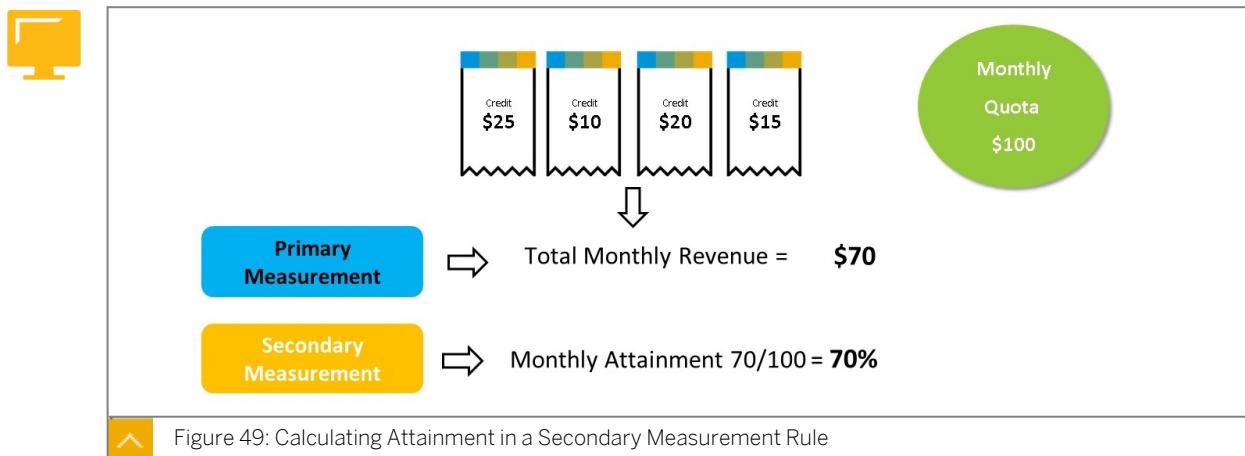


Figure 49: Calculating Attainment in a Secondary Measurement Rule



Video: Creating Secondary Measurement Rules

For more information on *Creating Secondary Measurement Rules*, please view the video in the lesson *Measurement Rules* in your online course.

Watch the video on '[Creating Secondary Measurement Rules](#)'.

To create a secondary measurement rule:

1. Create a new measurement rule.
2. On the Rule Basics tab, select *A rule that calculates other key performance measures*.

Rule Basics / Condition / Output /

What kind of Measurement rule do you want to create?

A Rule that Sums Up My Credits (Primary Measurement)

A Rule that Calculates other Key Performance Measures (Secondary Measurement)

Name: SMR_Monthly Attainment

Business Unit: BikesInMotion

Description:

Effective Dates: 1/1/2022 to 1/1/2020

Calendar: Main Monthly Calendar

3. Enter the calculation or other input for the desired result of the rule. In this case, we are showing the primary measurement (PM_Total_Sales_Revenue) divided by a \$100 quota.
4. Make sure the unit type is correct. Since attainment is returned as a percent, we changed the unit type to percent.

Rule Basics / Condition / Output / Measurement Amount

What is the amount of the Measurement?

Measurement Output Name: SM_Monthly Attainment

Unit Type: percent

Amount: PM_Total_Sales_Revenue:Month / \$100.00

Display Name for Reports: My Monthly Attainment

Reportable:



LESSON SUMMARY

You should now be able to:

- Create a primary measurement rule
- Create a secondary measurement rule

Unit 4

Lesson 5

Incentive Rules



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create incentive rules
- Create a per-credit commission incentive rule

Incentive Rules

Incentive Rules calculate earnings, based on achievement or other company defined objectives. Typically, when Commissions processes an Incentive Rule, it compares Measurements to attainment targets, such as Quotas for each Position Assignment.

Incentive Rules tend to be complex because they contain most of the business logic. As a result, there are many ways to configure these rules. Let's start by going over the basic types of Incentive Rules.



Video: Working with Incentive Rules

For more information on *Working with Incentive Rules*, please view the video in the lesson *Incentive Rules* in your online course.

Watch the video on '[Working with Incentive Rules](#)'.

Types of Incentive Rules



Basic Incentive Rule

Bonus Incentive Rule

Per-Credit Incentive Rule

A Basic or Aggregate Incentive Rule calculates commissions using either a fixed or sliding rate. This type of rule uses the Measurement as the input and generates the commission amount based on the Measurement, using a Rate Table, Fixed Value, Lookup Table or Formula.

The Bonus Incentive Rule is ideal for calculating a bonus or other incentive that is not a commission. We generally define a Bonus incentive rule as one that doesn't calculate the amount of the incentive based on the Measurement.

A Per-Credit Commission Incentive Rule evaluates the value of each Credit to produce individual Commission amounts for each credit. The rule then aggregates these amounts to yield total Commissions in the form of an Incentive.

Unit 4

Exercise 15

Exercise: Create a Commission Incentive Rule

Business Example

In this exercise, you will create a rule that calculates a monthly commission using the Rate Table created in a previous exercise.



Simulation

For more information on this topic please view the simulation in the lesson *Incentive Rules* in your online course.

1. Select *Incentive Rule*.
2. Select *Create New Rule*.
3. Enter the following options:
4. Select *Next*.
5. Leave the *Condition* field blank and select *Next*.
6. Follow the steps below to create the Incentive Output:
7. Select *Next*, then *Finish*.

Unit 4 Solution 15

Exercise: Create a Commission Incentive Rule

Business Example

In this exercise, you will create a rule that calculates a monthly commission using the Rate Table created in a previous exercise.



Simulation

For more information on this topic please view the simulation in the lesson *Incentive Rules* in your online course.

1. Select *Incentive Rule*.
2. Select *Create New Rule*.
3. Enter the following options:
 - a) What kind of Incentive rule do you want to create? Aggregated Incentive Rule.
 - b) Name: IR_Monthly_Sales_Commission.
 - c) Enter a description (optional).
 - d) Leave the Calendar and Effective Dates at the default.
4. Select *Next*.
5. Leave the *Condition* field blank and select *Next*.
6. Follow the steps below to create the Incentive Output:
 - a) Select *Create New Incentive Amount*.
 - b) Select *An incentive that calculates an amount based on a rate that needs to be calculated*.
 - c) Select *Next*.
 - d) Select *Measurements associated directly to the rep*.
 - e) Under *Choose your Measurement* select the drop-down menu and select *PM_Total Sales_Revenue*.
 - f) Leave the period at *month*, the period offset at 0 and select *Next*.

Incentive Type / Source / Rate table / Attainment / Apply /

What is the incentive based on?

Measurements associated directly to the rep
 Measurements from a not relationship

Choose your measurement

Which measurement: PM_Total_Sales_Revenue/Month/USD
 Which period level: Month
 Period offset: 0

<< Back Next >>

- g) Set the Commission rate to *Stepped rate based on an individualized rate table*.
- h) Select the Rate Table Variable *RTV_Comm_Rates*.
- i) Select Next.
- j) Is the rate based on target attainment? Yes.
- k) Define the target as the Fixed Value Variable for the Quota that we created in the previous lesson.
- l) In the Target Source field, type *ref* and select Reference: *Fixed Value*.
- m) Type *FV* and select *FV_Quarterly_Sales_Quota*.
- n) Set the Period Level to *Quarter*.

Incentive Type / Source / Rate table / Attainment / Apply /

Is the rate based on target attainment?

Yes
 No

Define the target

Target source: FV_Quarterly_Sales_Quota-Quarter
 Which period level: Quarter

<< Back Next >>

- o) Select Next.
- p) For the Commission Amount, select *Take commission rate* and apply it to the source.
- q) Change the Output Name to *IO_Monthly_Sales_Commission*.
- r) Change the Display Name for Reports to *My Monthly Sales Commission*.
- s) Change Unit Type to *USD*.
- t) Leave the Period Type at *Month*.

Incentive Type / Source / Rate table / Attainment / Apply /

What is the incentive amount?

Take commission rate and apply it to the source (Measurement: PM_Total_Sales_Revenue/Month/USD/Month/EUR)
 Take the rate and apply it to a custom formula (you will need to enter a formula)

Output Name: IO_Monthly_Sales_Commission
 Display Name for Reports: My Monthly Sales Commission

Unit Type: USD Period Type: Month
 Reportable:

Advanced Options (Generic Columns)

<< Back Next >>

7. Select Next, then Finish.

Incentive Rules

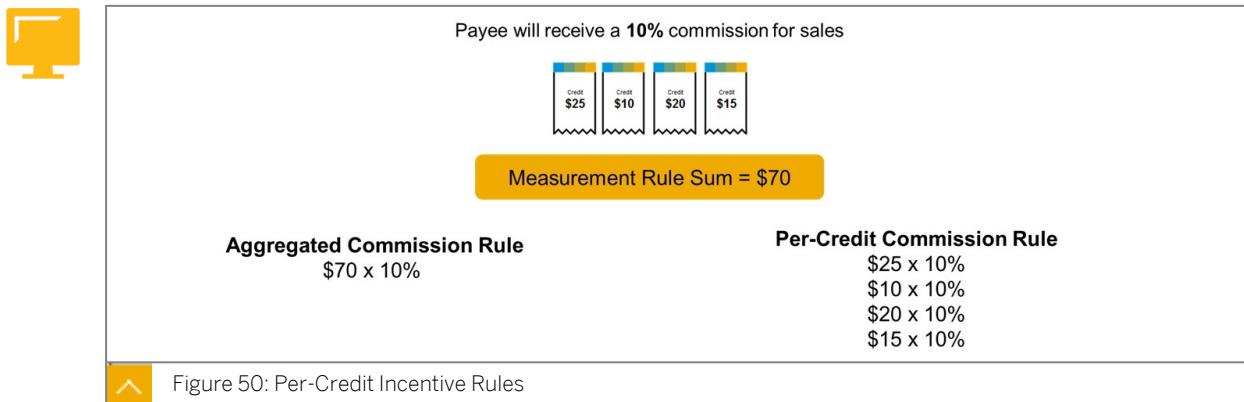
Basic Incentive Rules calculate Incentives directly from the aggregated Measurement. If the amount of commission paid out for each individual credit is required, the Incentive Rule should be changed to a Per-Credit Incentive Rule.

Per-Credit Rules measures the value of each credit against a rate table or a flat rate to produce individual commission amounts for each credit. This allows you to apply different rates to specific transactions in a period. The rule then aggregates these amounts in an Incentive.

Per-Credit Rules require more processing time but provide the results detail of commissions calculated for each credit. This type of rule doesn't produce different results than a basic incentive rule. A limitation of the per-credit commission rule is that it can only be tied to a primary measurement rule. It will not work with secondary measurement rules.

Organizations choose to use per-credit commissions for reporting purposes when rates for each product are different. Secondly, they may choose to use it, if there are special commissions for single credits over a specified amount.

The following diagram shows an example of the difference between an aggregate and a per-credit Commission Incentive Rule, even when the output value is the same.



Keep in mind that the measurement is still needed when creating per-credit incentive rules, because it is used to calculate the attainment. This is particularly important when using a rate table. To create a per-credit incentive rule:

1. Create a new incentive rule.
2. On the Rule Basics tab, select *Per-Credit Incentive Rule*.

Rule Basics / Condition / Source / Output /

What kind of Incentive rule do you want to create?

Aggregated Incentive Rule
 Per-Credit Incentive Rule

Name: IR_Per Credit Commissions Business Unit: BikesInMotion

Description:

3. On the Source tab, select the measurement.

The screenshot shows a configuration screen for an incentive rule. At the top, there are tabs: Rule Basics, Condition, Source (which is selected and highlighted in blue), and Output. Below the tabs, the question "What is the incentive based on?" is displayed. Two options are available: "Measurements associated directly to the rep" (selected) and "Measurements from a roll relationship". Underneath this, the heading "Choose your measurement" is shown. A table is present with three columns: "Which measurement:", "PM_Total_Sales_Revenue:Month:USD", and "Period offset: 0". The "Which measurement:" column has a dropdown arrow icon.

4. The rest of the rule is created just like a basic incentive rule.



LESSON SUMMARY

You should now be able to:

- Create incentive rules
- Create a per-credit commission incentive rule

Unit 4

Lesson 6

Deposit Rules



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a deposit rule
- Describe the use of Earning Groups and Earning Codes

Deposit Rules

Once we've calculated the amount of a payee's earnings in the Incentive Rules, we need to determine how much of the earning to pay and when to pay it. This is where the Deposit Rule comes in. The deposit rule is the most important rule in a plan, since it is the output of this rule that acts as input for the internal calculations that generate the payment.

A deposit is created only if the incentive is available for deposit. For example, a calculation run in February doesn't generate a deposit output for a quarterly incentive rule if the quarter ends in March.

There are two types of Deposit Rules:

- *Basic* Deposit Rules use Incentives as their input
- *Detail* Deposit Rules use Credits as their input

Some things you can do in a Deposit Rule:

- Put a hold on all or part of a Deposit until a future period
- Differentiate or combine multiple incentives into a single deposit
- Assign Earning Groups and Earning Codes to a Deposit



Video: Working with Deposit Rules

For more information on *Working with Deposit Rules*, please view the video in the lesson *Deposit Rules* in your online course.

Watch the video on '[Working with Deposit Rules](#)'.

Hold Functions In Deposit Rules

Hold functions are used to delay a compensation payment for the payee. This is done in cases where the company needs to wait to pay the appropriate compensation to the payee.

Hold Types include:

- **Release Immediately:** Do not place a hold.

- **Indefinite Hold:** This will hold the deposit indefinitely, until an Administrator manually releases the hold.
- **Hold with Conditions:** Holds a payment until a condition is true. For example, an employee can receive their bonus once they have reached 90 days of employment.
- **Period Type:** Release a payment after a certain number of periods.

Earning Groups And Earning Codes

Earning Codes and Earning Groups are required fields within a deposit rule.

Earning Codes: These are labels that define different types of deposits. They're primarily used for accounting purposes.

Earning Groups: These are used to group similar types of deposits. Payments of the same earning group aggregate or offset each other.

Both Earning Groups and Earning Codes have dropdown lists that can be populated from the Global Values.

Example of Earning Groups and Earning Codes

In the example below, Incentive 1 and Incentive 2 have the same Earning Group (Commission). The two are combined in a single Payment (Payment 1) with an Earning Group of Commission. The two values (-\$500 and \$200) are combined into a value of -300. Since Deposit 3 has a separate Earning Group (Bonus), the resulting Payment is separate from Payment 1 and pays a value of \$100.



Unit 4 Exercise 16

Exercise: Create a Basic Deposit Rule

Business Example

In this exercise, you will create a basic deposit rule to set the terms of payment for the Monthly Commission. The value of the deposit will be populated with the incentive output.



Simulation

For more information on this topic please view the simulation in the lesson *Deposit Rules* in your online course.

1. Select *Deposit Rule* and select *Create New Rule*.
2. Select the radio button for *A rule that uses one or more Incentives as input*.
3. Type *DR_Monthly_Commission_Deposit* in the Name field.
4. Confirm *BikesInMotion* is selected as the Business Unit.

The screenshot shows the 'Rule Basics' step of a wizard. It asks 'What kind of Deposit rule do you want to create?' with two options: 'A Rule that Uses One or More Incentives as Input' (selected) and 'A Rule that Uses Credits as Input'. Below this, there are fields for 'Name' (set to 'DR_Monthly_Commission_Deposit'), 'Business Unit' (set to 'BikesInMotion'), 'Description', 'Effective Dates' (set to 'January 2022' to 'End of Time'), and 'Calendar' (set to 'Main Monthly Calendar'). At the bottom are buttons for '<> Back', 'Next >>', 'Cancel', and 'Finish'.

5. Select *Next*.
6. Leave the condition box blank and select *Next*.
7. Select *Create New Deposit Amount*.
8. Enter the following in the Deposit Amount:
9. Select *Next*, then *Finish*.
10. Save changes to the compensation plan.

Unit 4

Solution 16

Exercise: Create a Basic Deposit Rule

Business Example

In this exercise, you will create a basic deposit rule to set the terms of payment for the Monthly Commission. The value of the deposit will be populated with the incentive output.



Simulation

For more information on this topic please view the simulation in the lesson *Deposit Rules* in your online course.

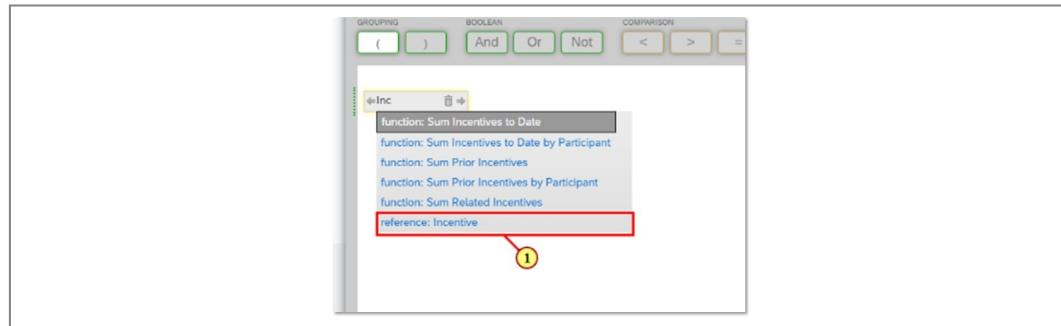
1. Select *Deposit Rule* and select *Create New Rule*.
2. Select the radio button for *A rule that uses one or more Incentives as input*.
3. Type *DR_Monthly_Commission_Deposit* in the Name field.
4. Confirm *BikesInMotion* is selected as the Business Unit.

A screenshot of a software interface titled "Rule Basics". It shows a question "What kind of Deposit rule do you want to create?" with two radio button options: "A Rule that Uses One or More Incentives as Input" (selected) and "A Rule that Uses Credits as Input". Below this are fields for "Name" (set to "DR_Monthly_Commission_Deposit"), "Business Unit" (set to "BikesInMotion"), "Description", and "Effective Dates" (set to "January 2022" to "End of Time"). A "Calendar" dropdown is set to "Main Monthly Calendar". At the bottom are buttons for "<> Back", "Next >>", "Cancel", and "Finish".

5. Select *Next*.
6. Leave the condition box blank and select *Next*.
7. Select *Create New Deposit Amount*.
8. Enter the following in the Deposit Amount:
 - a) Output name: *DO_Monthly_Commission_Deposit*.
 - b) Use the editor to reference the incentive *IO_Monthly_Sales_Commission*.
 - c) Select the Editor Window.

A screenshot of a software interface titled "Output Name:" with the value "DO_Monthly Services Commission Deposit". Below it is an "Amount:" section with a text input field containing "*Inc*" and a "Value" dropdown menu. At the bottom right are buttons for "OK" and "Cancel".

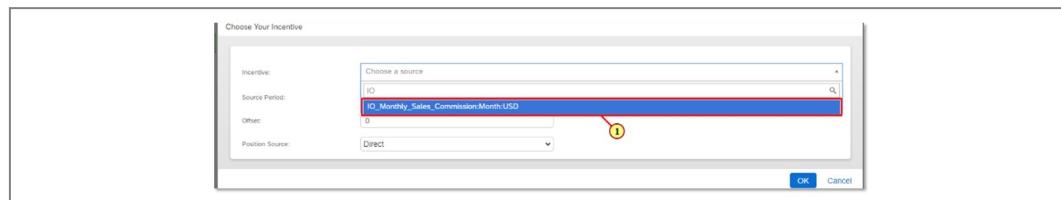
- d) Enter *Inc* in the Expression box.
- e) Select reference: *Incentive*.



f) Select the *Incentive* dropdown.



g) Enter *IO* and select *IO_Monthly_Sales_Commission:Month:USD* from the dropdown.

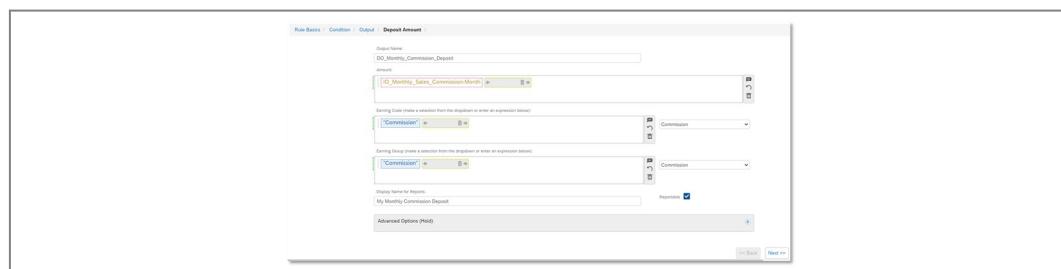


h) Select *OK*.

i) Select *Commission* in the *Choose earning code* drop down menu to the right of the Earning Code expression box.

j) Select *Commission* in the *Choose earning group* drop down menu to the right of the Earning Group expression box-

k) Type *My Monthly Sales Commission Deposit* in the *Display Name for Reports* field.



9. Select *Next*, then *Finish*.

10. Save changes to the compensation plan.

Detail Deposit Rules

As we saw earlier, the difference between a basic deposit rule and a detail deposit rule is the source of the value. Basic deposit rules are populated with an incentive, while detail deposit rules get their values from credits. Use detail deposit rules when your compensation plan does not use incentive rules to calculate earnings.

As with per-credit incentive rules, it is still important to select a measurement when creating detail deposit rules. This is because the measurement filters credits, ensuring only the desired credits are included.

To create a detail deposit rule:

1. From the compensation plan, select the Deposits button, then select Add New.
2. Specify the calendar and effective dates and select OK.
3. Select A Rule that uses Credits as Input
4. Enter a name for the deposit rule. Optionally, enter a description.

Figure 52: Creating a Detail Deposit Rule - Basics

5. Select Next.
6. In the Source tab, select the measurement.
7. Select Next.
8. Leave the condition blank and select Next.
9. Select Create New Deposit Amount and enter the following information in the Deposit Amount tab:
 - Change the Output Name to the desired name of the deposits
 - Set the Amount field to the field on the credit; for example, credit.value
 - Set the Earning Group and Earning Code
 - Set the display name for reports
 - Optionally, use the advanced options to put a hold on the deposit.

The screenshot shows a configuration screen for a deposit rule. At the top, there are tabs: Rule Basics, Source, Condition, Output, and Deposit Amount. The Deposit Amount tab is active. The main area contains several input fields:

- Output Name:** D0_Detail_Deposits
- Amount:** CreditValue (with a dropdown menu showing 'Commission')
- Earning Code:** Commission (with a dropdown menu showing 'Commission')
- Earning Group:** Commission (with a dropdown menu showing 'Commission')
- Display Name for Reports:** My Credit Deposits
- Reportable:**
- Advanced Options (Hold):** A button with a plus sign (+) is visible.

At the bottom right, there are navigation buttons: <> Back, Next >>.



Figure 53: Creating a Detail Deposit Rule - Output



LESSON SUMMARY

You should now be able to:

- Create a deposit rule
- Describe the use of Earning Groups and Earning Codes

Assigning Variables



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Assign rule elements to variables in a compensation plan

Assigning variables

Now that we have created our compensation plan rules, we are almost done! Before we are finished, we need to assign the variables we used in our rules.

Now that we have created the compensation plan and rules, the last step is to assign any variables we used in the rules to their respective position assignments. Assigning the variables to their respective territories and fixed values provides the rule with the information it needs to assign actual values for each position assignment.

If the plan assigned to the title includes rules with one or more variables, those variables are displayed in the Variables Assignment area of the plan.

You can assign default values to variables at four different levels:

- The Variable level, by assigning a default to the variable
- The plan level
- The title level
- The position level

It's possible to assign a variable on multiple levels. For example, a fixed value variable may be assigned to one fixed value for all Sales Representatives (title level), but a second fixed value for the Sales Representative – Central (position level). If this is the case, the priority goes first to the position, then the title, followed by the plan, and finally the default.

Unit 4 Exercise 17

Exercise: Assign Variables

Business Example

Now that you have created our compensation plan rules, we are almost done but before you finish, you need to assign the variables used in rules.



Simulation

For more information on this topic please view the simulation in the lesson *Assigning Variables* in your online course.

1. Assign the T_Americas territory to Position SR-C1 (Sales Rep Central)
2. Assign the T_EMEA territory to Position SR-EMEA1 (Sales Rep Europe)

Unit 4

Solution 17

Exercise: Assign Variables

Business Example

Now that you have created our compensation plan rules, we are almost done but before you finish, you need to assign the variables used in rules.



Simulation

For more information on this topic please view the simulation in the lesson *Assigning Variables* in your online course.

1. Assign the T_Americas territory to Position SR-C1 (Sales Rep Central)

- a) Click *Assignments*.
- b) Select the *View Variable assigned by* button to open a dropdown list.

The screenshot shows a software interface for managing assignments. At the top, there's a dropdown menu labeled "View Variable assigned by" with options like "Default", "Position", and "Title". Below this is a search bar and a table listing variables. The table has columns for "Variable", "Variable Type", and "Variable Assignment". Two entries are shown: "RTV_Comm_Rates" (Rate Table) and "TV_Sales_Territory" (Territory). The "Variable Assignment" column for "RTV_Comm_Rates" contains the text "RT_Commission Rates (Rate Table Variable)".

- c) Select *Position*.
- d) Select *SR-E1*.
- e) Select *Edit*

This screenshot shows the "Assignments" screen in edit mode. It features a "Plan Details" header with tabs for "General Information" and "Assignments". Below this is another dropdown menu for "View Variable assigned by" with "Position" selected. The main area displays the variable assignment details, which are identical to the ones in the previous screenshot: "RTV_Comm_Rates" (Rate Table) and "TV_Sales_Territory" (Territory), both assigned to "RT_Commission Rates (Rate Table Variable)".



Note:

The image shows that the Rate Table Variable and the Territory Variable are in use. The Rate Table Variable does not have to be assigned, because the correct rate table is already set as the default.

This screenshot shows the final state of the variable assignments. The "Assignments" screen displays the same table as before, with "RTV_Comm_Rates" assigned to "RT_Commission Rates (Rate Table Variable)" and "TV_Sales_Territory" assigned to "Territory".

- f) Enter *T_* in the Territory box and press *Enter*.
- g) Select *T_Americas*.
- h) Select Save.
2. Assign the *T_EMEA* territory to Position *SR-EMEA1* (Sales Rep Europe)
- Select the *View Variable assigned by* button to open a dropdown list.
 - Select *Position*.
 - Select the *View Variable assigned by* button to open a dropdown list.
 - Select *SR-EMEA1*.



- Select Edit.
- Select *Territory*.
- Enter *T_* in the Territory box and press *Enter*.
- Select *T_EMEA*.
- Select *T_EMEA*.
- Select Save.



LESSON SUMMARY

You should now be able to:

- Assign rule elements to variables in a compensation plan

Learning Assessment

1. You are preparing a compensation plan design for your organization's Account Executives. Which of the following should you take into account when designing the plan? (3 correct answers)

Choose the correct answers.

- A Whether a Credit Type will be needed.
- B What Business Units the organization will use.
- C What Event Types the organization will use.
- D How many customers the organization has.
- E Are credits going to roll within the organization.

2. Where do you assign a compensation plan to a title?

Choose the correct answer.

- A On the Assignments tab of the plan.
- B In the Plan field of the Title record.
- C In the Plan field of a Position record.
- D On the Titles tab of the plan.

3. What are the four types of compensation plan rules?

Choose the correct answer.

- A Credit, Primary Measurement, Secondary Measurement, Incentive
- B Credit, Primary Measurement, Secondary Measurement, Deposit
- C Credit, Measurement, Incentive, Deposit
- D Measurement, Basic Incentive, Per-Credit Incentive, Deposit

4. Which of the following would be a scenario in which you would create an indirect credit rule? (3 correct answers)

Choose the correct answers.

- A Sales managers are paid a bonus if all team members meet their sales quota for the quarter.
- B Account Executives are paid both a monthly commission and a quarterly bonus.
- C Sales Engineers are paid a commission based on the performance a Sales Rep with whom they have a working relationship.
- D Account Executives who exceed their annual quota are granted access to the Presidents Club.
- E The Vice President of Sales receives a year end bonus if total sales exceed US\$50 million.

5. You are creating a credit rule that allocates credits directly to a Sales Representative assign on the transaction. Which of the following do you select?

Choose the correct answer.

- A Credit based on the entire order.
- B Credit based on an individual transaction.
- C Credit based on a rolled order credit.
- D Credit based on a rolled transaction credit.

6. You are creating an indirect credit rule that rolls credits from a sales rep to their manager. Which of the following must you do? (2 correct answers)

Choose the correct answers.

- A Set the rule type to Credit based on a rolled transaction credit.
- B Set the rule type to Credit based on an individual transaction.
- C Check Rolling Through and select the roll type.
- D Create a secondary measurement rule.

7. Which type of rule aggregates direct and indirect credits for a single position assignment?

Choose the correct answer.

- A Primary Measurement
- B Secondary Measurement
- C Incentive
- D Deposit

8. You would like to add a rule to your plan that calculates quarterly attainment by dividing the measurement for the quarter by the quarterly quota. Which type of rule would be best for this?

Choose the correct answer.

- A Secondary Measurement
- B Indirect Credit
- C Bonus Incentive
- D Per-Credit Incentive

9. Which type of rule calculates commissions based on a primary measurement using either a fixed or sliding rate?

Choose the correct answer.

- A Commission Incentive
- B Bonus Incentive
- C Secondary Measurement
- D Detail Deposit

10. Your organization is required to report the commission amount paid for each sale. Which type of rule allows you to do this?

Choose the correct answer.

- A Direct Credit Rule
- B Secondary Measurement Rule
- C Detail Deposit Rule
- D Per-Credit Incentive Rule

11. Which of the following is a label on the deposit rule used to aggregate deposits into a single payment?

Choose the correct answer.

- A Deposit Type
- B Earning Group
- C Earning Code
- D Payment Type

12. You wish to place a hold on a payment for one month. How would you do this?

Choose the correct answer.

- A Put a hold on the deposit.
- B Put a hold on the credit.
- C Use a condition in the incentive rule.
- D Use a condition in the deposit rule.

13. How do you create a detail deposit rule?

Choose the correct answer.

- A Select A rule that uses one or more incentives as input.
- B Select A Rule that uses credits as input.
- C Set the deposit amount to equal the value of the transaction.
- D Set the deposit amount to equal the value of the credit.

14. You have incorporated variables in your compensation plan. At which point do you assign the variables to their compensation elements?

Choose the correct answer.

- A Before importing transactions.
- B Before creating the credit rules.
- C After creating the variables.
- D After creating the compensation plan rules.

Lesson 1

Overview of the Pipeline

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Lesson 2

Calculation Run Preferences

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Lesson 3

The Compensate and Pay Sequence

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Exercise 18: Exercise: Run Compensate and Pay in the User Interface

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Lesson 4

Calculation Results

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Exercise 19: Exercise: Create a Manual Deposit

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UNIT OBJECTIVES

- List the various tasks that use the pipeline
- Use system preference to fine-tune calculation behavior
- Name and describe the stages of the compensate and pay sequence of the pipeline
- Review calculation results and log files
- Define payments and balances
- Describe the functionality of the post and finalize tasks
- Manually create and adjust transactions, credits, and deposits

Unit 5

Lesson 1

Overview of the Pipeline



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- List the various tasks that use the pipeline

Pipeline Tasks

The processing engine used by SAP Commissions is called the Pipeline. This engine performs tasks to process compensation, import data, create payments and balances, and many more tasks. Running a pipeline isn't the only key to compensation. The Pipeline processing engine also generates Dashboards, Reports and other results. The Pipeline should be run on a consistent schedule and in sequence with other tasks. For example, an organization may wish to do the following:

- Import data from source systems daily at 11 PM local time
- Run Compensate and Pay daily at 11:30 PM local time
- Update data in Dashboards weekly
- Post payments and balances monthly, ten days after the end of the period

The Pipeline engine is used to perform the following tasks:

- *Run a Compensation Calculation for All Sales Deals* calculates payments and balances for payees. This is often called the *Calculation* and is the most common type of Pipeline.
- *Import Data from Stage* validates and transfers data from staging tables to production.
- *Import Plan Data* imports plan and plan-related data from an XML file. This is often done to move new plan designs from one environment to another.
- *Purge Import Data* clears a batch of data records from the staging tables.
- *Approve Calculated Data* creates a new dataset that can be leveraged in dashboards.
- *Purge Approved Data* deletes data from the Approve Calculated batch.

In this unit, we'll focus on the first task: Run a Compensation Calculation for All Sales Deals. For simplicity, we will refer to this task as the *Calculation*.



Video: Pipeline Introduction

For more information on *Pipeline Introduction*, please view the video in the lesson *Overview of the Pipeline* in your online course.

Watch the video on [Pipeline Introduction](#).



LESSON SUMMARY

You should now be able to:

- List the various tasks that use the pipeline

Calculation Run Preferences



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Use system preference to fine-tune calculation behavior

Calculation Run Preferences



Video: Calculation Run Preferences

For more information on *Calculation Run Preferences*, please view the video in the lesson *Calculation Run Preferences* in your online course.

Watch the video on '[Calculation Run Preferences](#)'.

The performance of the Calculation can be fine-tuned in the System Preferences workspace. The following settings are available:

Payment Threshold: If populated, the calculation doesn't generate payments that are either below or equal to the value specified in this option. A zero value indicates no threshold.

Maximum Data Log Entries per Error: Sets the maximum worker log entries for Message Logs workspace.

Path to Export Pay File: Specifies the location of the Pay File generated in the Post stage. Specify the path using forward slash. For example: C:/console.

Audit Logs Retention Days: Audit logs will be purged after retention days are passed. If this value is set to zero, the audit logs won't be purged.

Allow Negative Payments: Specifies whether to allow negative payments to be posted. If negative payments are allowed, no balance is carried to the next period.

Allow exports of XML data with circular references: If checked, the export of XML data with circular references is allowed.

Generate Transaction Adjustments when Existing Transactions are Imported: If enabled, transaction adjustments are created when existing transactions are reimported.

Run All Transactions on Order: If incremental mode is run and the order-level functions are enabled in transaction credit rules, activate this property. Leaving this property inactivated improves performance.

On Demand Position Processing: Specifies the use of on-demand position processing. If set to True, only active positions are processed. If set to False, all positions, including inactive ones, are processed.

Log Warnings to Database: Specifies whether warnings are displayed along with errors. If inactivated, only errors appear in the Pipeline workspace. If activated, warnings will appear as well.

Generate Credit to Transaction Summary: If enabled, the Credits table is populated as part of the Allocate stage. Disabling this feature can improve performance.

Disable Org Search and Validation for Transaction Participant Pre-Assignment: If enabled, payees in preassigned transactions are validated against the organization data.

Search Order ID Starting with Term and Case Sensitive: If enabled, the “type ahead search” for order ID is case sensitive and starting with term. This offers better performance.

Enable Runnable flag on manual transaction edit: If set to True, any time a transaction is edited, the Runnable flag will be checked. If set to False, editing a transaction will not automatically make it runnable. Set to True by default.

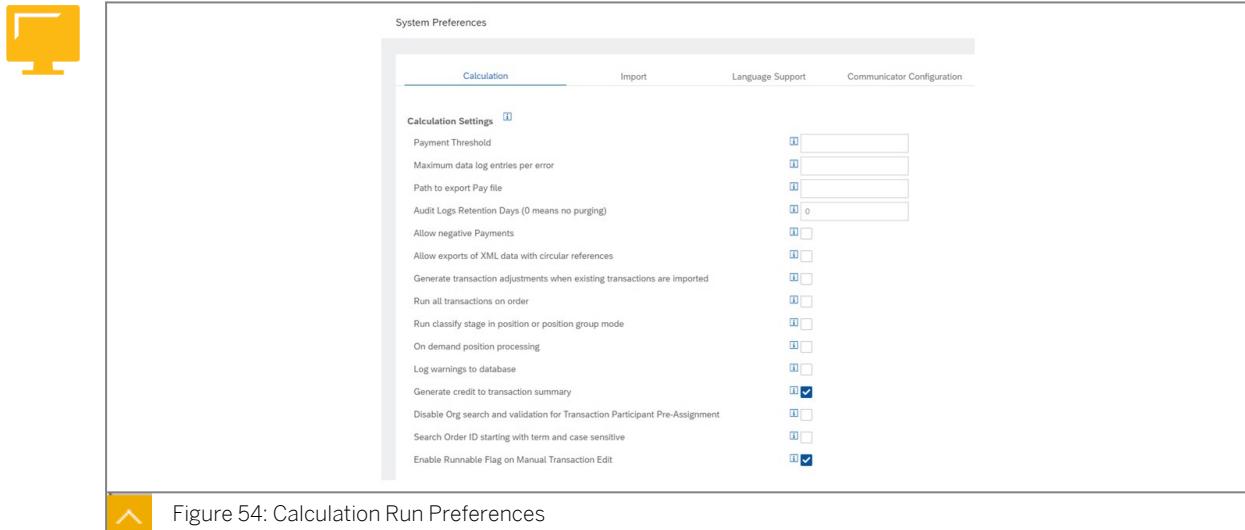


Figure 54: Calculation Run Preferences



LESSON SUMMARY

You should now be able to:

- Use system preference to fine-tune calculation behavior

The Compensate and Pay Sequence



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Name and describe the stages of the compensate and pay sequence of the pipeline

The Compensate And Pay Sequence



Animation: Stages of Compensate and Pay

For more information on *Stages of Compensate and Pay*, please view the animation in the lesson *The Compensate and Pay Sequence* in your online course.

The first four stages of the Calculation are generally run together as a sequence called *Compensate and Pay*. Working together, these four stages begin with transactions and process the plan rules to produce trial payments and balances. The four stages of Compensate and Pay are:

Classify: During the Classify stage, transactions are matched with classifiers using the classification rules. When a match is found between a transaction field and a classifier, the transaction is classified. Transactions can be classified multiple times.

Allocate: In the Allocate stage, classified transactions are processed by Credit rules using direct transaction assignments, territory requirements, conditions, and roll relationships to allocate credits to position assignments. Credits are then aggregated by Primary Measurements.

Reward: In the Reward stage, Secondary Measurements are calculated from primary measurements or other data, incentives are calculated, and deposit amounts are created and marked with deposit release information.

Pay: In the Pay stage, outstanding balances are applied to current deposits. Also, deposits are combined with other deposits using the same Earning Group to generate payments that are the sum of Deposits and Balances.



Compensate and Pay Sequence		Stages	Phases
		Classify	Classify Transactions
		Allocate	Allocate Direct Credits, Indirect Credits and Primary Measurements
		Reward	Reward Secondary Measurements, Incentives, & Deposits
		Pay	Calculate Trial Payments and Balances

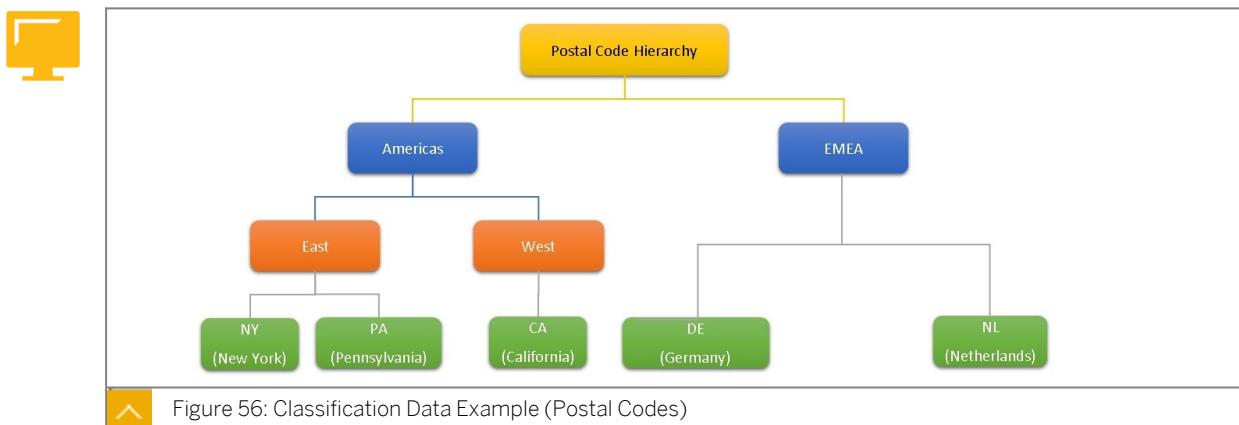
Figure 55: Stages of the Calculation

Let's look at an example of how the stages of Compensate and Pay work together.

Terry Callahan is a Sales Representative for the East region. His territory has been defined as all sales that fall under the EAST category in the Postal Code hierarchy. As you can see from the diagram below, this includes the US states of New York (NY) and Pennsylvania (PA).

Classify Stage

In the Classify stage, the *Classifier ID* is used to match each transaction with a region. Using the classification rule below the diagram, if the State field on the transaction matches NY or PA, the transaction will be classified, or associated with the East category.



Classification Rule: Postal Code.Classifier ID = Transaction.Billing.State

Allocate Stage

The Allocate stage has two jobs: allocate credits to payees, and aggregate those credits. The credit rule allocates credits, and the primary measurement rule aggregates them.

In January 2022, the following transactions in Terry's region took place:

Order ID	State	Value
665	NY	\$1750
710	PA	\$1200
790	PA	\$2300
	TOTAL	\$5250

In the credit rule, we specified that any transaction classified as *East* would be allocated to Terry Callahan. Three credit records are created.

The primary measurement rule would simply aggregate these credits, creating a measurement with a value of \$5250. Again, this measurement would be allocated to Terry.

Reward Stage

The Reward stage processes the rest of the rules: Secondary Measurement, Incentive, and Deposit. Each of these rules creates output records with the results of their calculations, again, each allocated to Terry.

Let's take a simple example in which Terry is paid a flat commission of 10% on all sales. This means he has earned a commission of \$525 for the month.

At this point, you may be wondering what else has to happen. After all, we've completed all our calculations! This brings us to the last stage, which does not correspond to any plan rules.

Pay Stage

The Pay stage is processed using internal calculations. Using the results of the deposit rules, it aggregates deposits for each payee and converts them into payments, and applies any outstanding balances from prior periods. Think of this as the stage that packages up each payee's deposits and gets them ready for payroll.

Let's say that the deposit rule we created to manage Terry's payments has an Earning Group of *Commission*. If this is the only commission that he earned this month, then that's the payment amount he will receive. However, let's say it turns out he has a \$200 balance from a prior period that has been on hold. In that case, the Pay stage applies that balance and generates a payment of \$725.

At this point, this is only a Trial payment. This is because when Compensate and Pay is usually run multiple times in the period, so we are not ready to mark the amount as permanent. We will see how to post payments later in this topic.

Processing Modes

Depending on the objective of the Pipeline run, some transactions may not require processing every time a Pipeline is run. Different processing modes may be selected, according to your needs.

Processing Mode Types:

- Process all transactions for all Positions (Full Mode)
- Process new and modified transactions & credits for all Positions (Incremental)
- Specific Position or Specific Position groups

Running the Pipeline to Calculate Results

Watch the video on [Running a Pipeline](#).



Video: Running a Pipeline

For more information on *Running a Pipeline*, please view the video in the lesson *The Compensate and Pay Sequence* in your online course.

When running a calculation, you will be prompted to select the calendar and period.

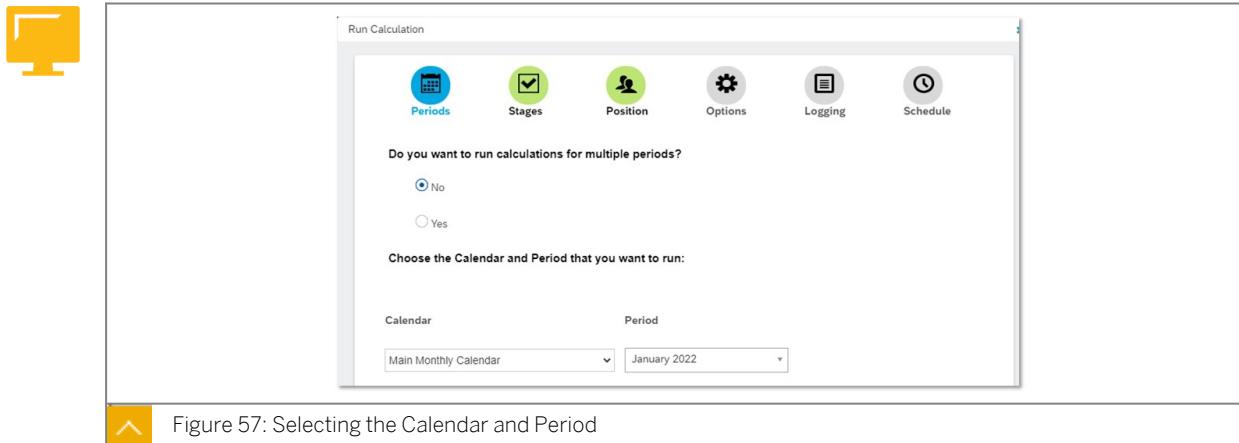


Figure 57: Selecting the Calendar and Period

If processing units are enabled you will also select the processing unit.

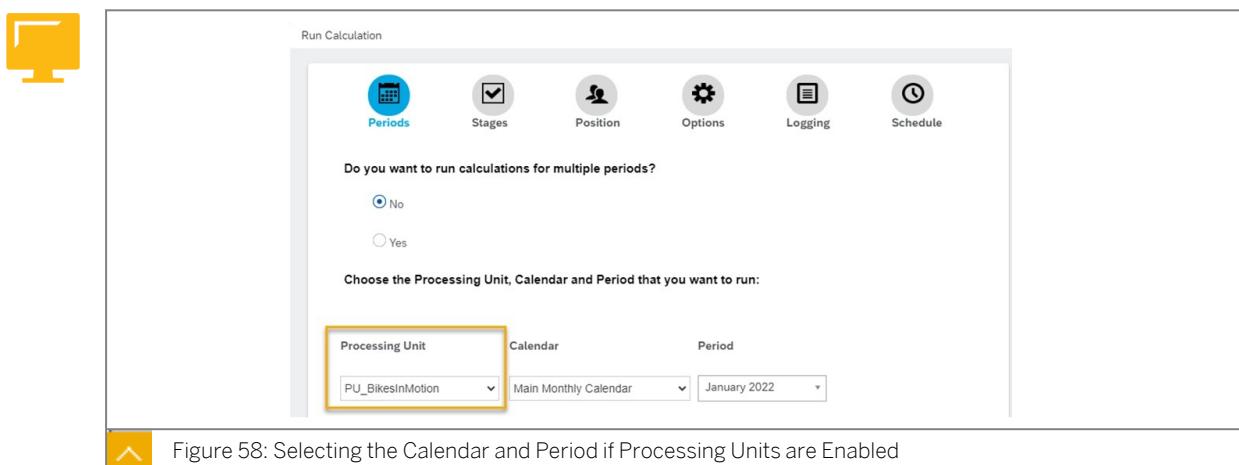


Figure 58: Selecting the Calendar and Period if Processing Units are Enabled

If you choose to run calculations for multiple periods, you will be prompted to enter a start and end period. The calculations will be run in sequence.

The Pipeline can only run on the leaf-level, or most granular, period in the calendar. For example, if the calendar has months, quarters, and years, the Pipeline can only be run for the month.

Select the Task

The next prompt displays the tasks that the Pipeline can perform. To calculate compensation, select *Run a compensation calculation for all sales deals*.



What type of job do you want to perform? I want to...

Run a compensation calculation for all sales deals

Import data from stage

Import plan data

Purge import data

Approve calculated data

Purge approved data

Figure 59: Run a Calculation

Select the Stage to Run

The next step is to select which stages of the Pipeline to run. In the Pipeline Wizard, the Compensate and Pay sequence includes the stages Classify, Allocate, Reward, and Pay. While all of these stages are selected by default, you can also run them one at a time.



Select which stages you want to run. I want to...

Run an individual Compensate and Pay stage

Classify transactions

Allocate credits and calculate primary measurement values

Calculate secondary measurements, incentives, and deposit values

Calculate payments and balances

Generate Statements

Update Analytics

Data Extracts

Post payments and calculate balances

Undo Last Post Run

Finalize payments for a period

Undo Last Finalize Run

Reset Data

Figure 60: Selecting the Stages of the Calculation

Additional Calculation Options

During a normal Compensate and Pay sequence, any results data that was generated from prior calculations for the current period are removed so the updated results can be generated. This is called a reset.

In some cases, you may need to reset data manually. If this is the case, here are few items to keep in mind.

- The reset process deletes, sets to zero, or nullifies results data
- Resets clean the database so that the specified Pipeline stages can populate the database with new data
- The reset processes are organized sequentially: earlier resets call later resets, but not the other way around
- When a reset is run, it resets data related to the specified period only

- Data entered manually, such as credits and deposits, aren't reset.

The order of stages is: Classify, Allocate, Reward, and Pay. Each stage can be reset.

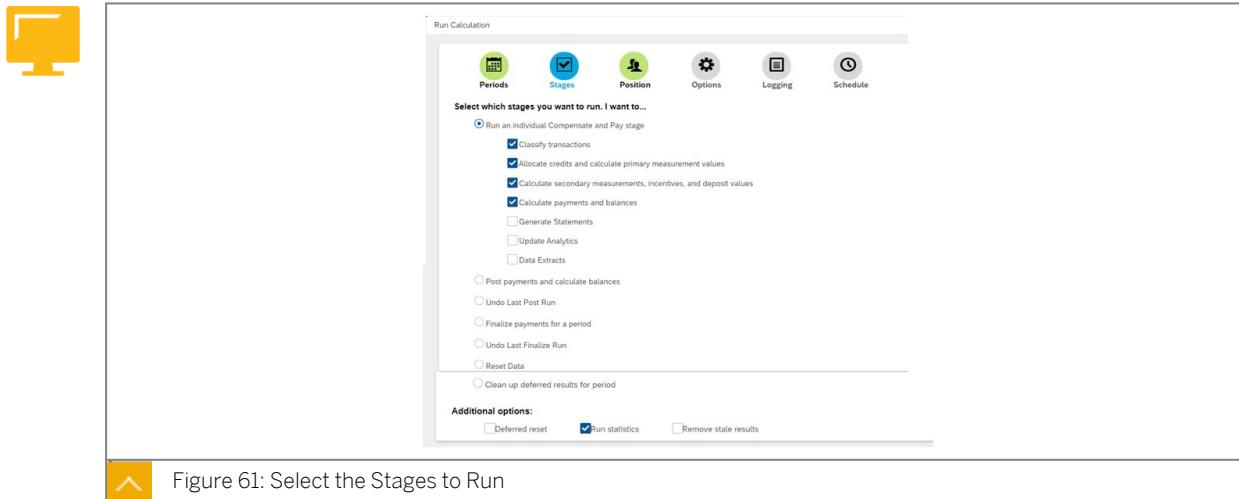


Figure 61: Select the Stages to Run

Deferred Reset allows SAP Commissions to retain data from the last Pipeline run. Instead of resetting the data, it instead marks it as invalid and flags it for deletion. To clean up data that is flagged for deletion, run the Reset process.

Run statistics reindexes the database after the Pipeline is run. This is checked by default.

Remove Stale Results allows you to remove old results or results without associated data from the pipeline report.

Selecting the Calculation Mode

You will next be prompted to select for whom you want to run the calculation and for which transactions.

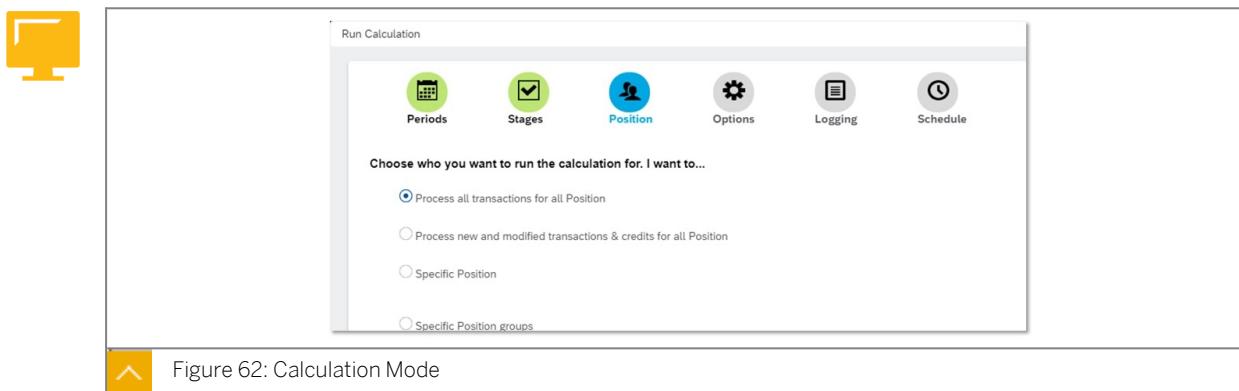


Figure 62: Calculation Mode

Running a Calculation by Position Group

If you're using Position Groups, you can run any Calculation for only members of a single Position Group. This is convenient if different payees should be compensated on different schedules.

For example, let's say your organization needs to pay its Sales Reps in the USA and Canada on the first day of the month, but in Europe on the tenth of the month. One option is to use Position Groups to organize your payees by country, run Post for Americas on the first, and run Post for Europe/EMEA on the tenth.

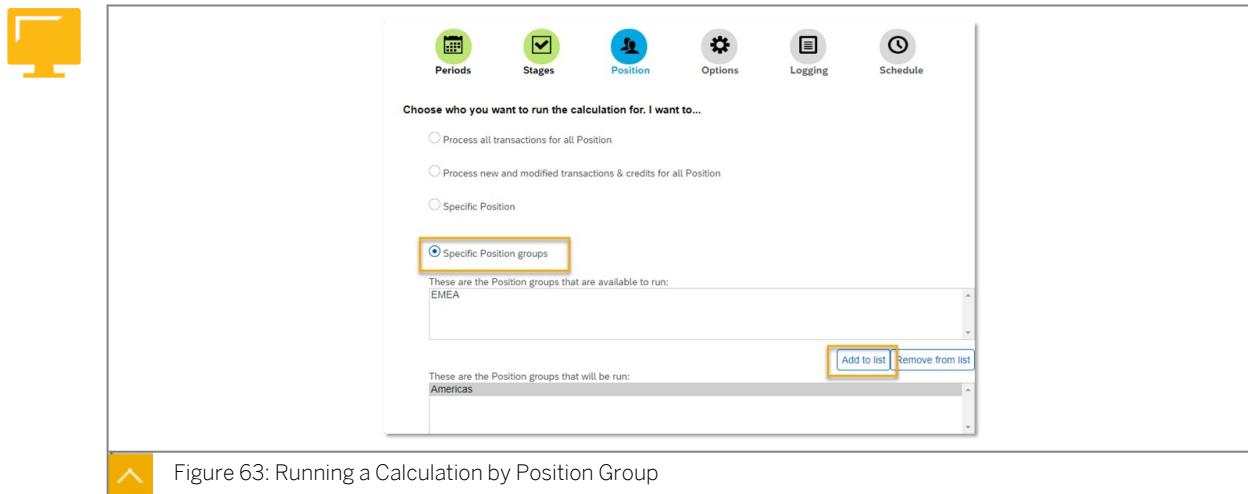


Figure 63: Running a Calculation by Position Group

Log Files

Log files are generated every time a Pipeline is run. In the Pipeline Wizard, you have several options to specify your logging preferences.

By default, Advanced Logging is disabled. This causes all log files to generate summary results.

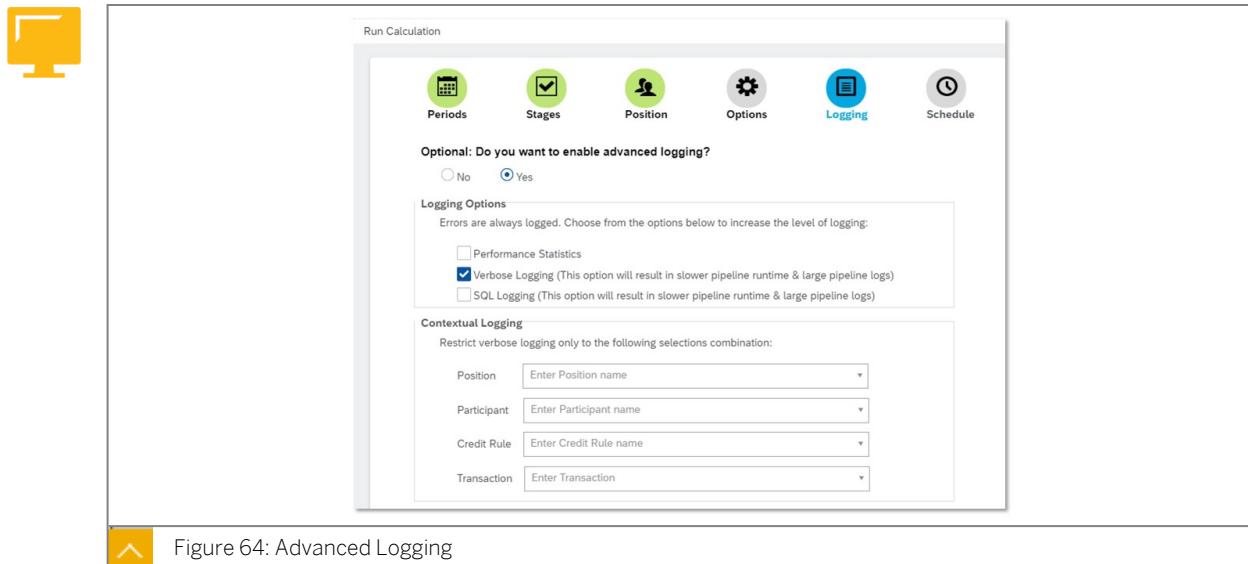


Figure 64: Advanced Logging

Enable Advanced Logging creates more detailed log files, and allows you to select from several options.

- Performance Statistics enables you to receive advanced performance statistics and logging results.
- Verbose Logging gives you detailed calculation logging. This is a good option if you see errors after running the calculation. To reduce the size of verbose logs, Contextual Logging allows you to filter the verbose logging by position, participant, credit rule, or transaction.
- SQL Logging details the calculation breakdown and data and time details for rule evaluation.



Note:

Running Advanced Logging will increase the pipeline time. In general, this option should be used only for development, testing and troubleshooting.

Scheduling the Calculation

Running the Calculation from the user interface allows two options: *Run Now* and *Schedule to run on the following time*. While you can use other methods to schedule calculations to run on a regular schedule, the user interface only allows a one-time future run.



The screenshot shows the 'Run Calculation' dialog box. At the top, there are six circular icons with labels: Periods (green), Stages (green), Position (green), Options (grey), Logging (green), and Schedule (blue). Below these icons is a question: 'When do you want to run this?'. There are two radio button options: 'Run Now' (unselected) and 'Schedule to run on the following time' (selected). Underneath this, there are two input fields: 'mm/dd/yyyy' and 'h:mm am/pm'.

Figure 65: Scheduling the Calculation

Unit 5

Exercise 18

Exercise: Run Compensate and Pay in the User Interface

Business Example

In this exercise, you will run Compensate and Pay to calculate results for our payees based on transactions in January 2022.



Simulation

For more information on this topic please view the simulation in the lesson *The Compensate and Pay Sequence* in your online course.

1. From the Run menu, select *Pipeline*.
2. Select the *Run a Pipeline* icon.

Start Time	Run Stage	Period	Status	Stop Time	Mode
9/29/2022, 12:44 PM	Compensate And Pay	December 2021	Successful	9/29/2022, 12:45 PM	Full
9/29/2022, 12:43 PM	Compensate And Pay	November 2021	Successful	9/29/2022, 12:44 PM	Full
9/29/2022, 12:42 PM	Compensate And Pay	October 2021	Successful	9/29/2022, 12:43 PM	Full
9/29/2022, 12:41 PM	Compensate And Pay	September 2021	Successful	9/29/2022, 12:42 PM	Full
9/29/2022, 12:40 PM	Compensate And Pay	August 2021	Successful	9/29/2022, 12:41 PM	Full
9/29/2022, 12:40 PM	Compensate And Pay	July 2021	Successful	9/29/2022, 12:40 PM	Full
9/29/2022, 12:39 PM	Compensate And Pay	June 2021	Successful	9/29/2022, 12:40 PM	Full

3. Select Run a compensation calculation for all sales deals and select Next.

What type of job do you want to perform? I want to...

Run a compensation calculation for all sales deals

Import data from stage

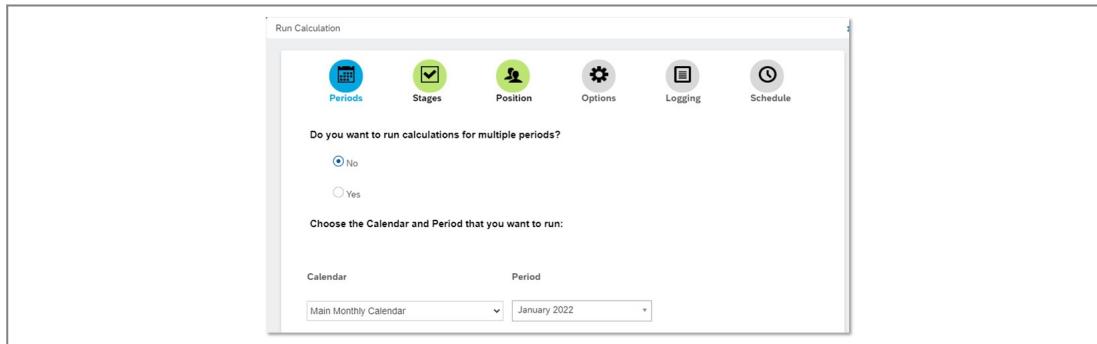
Import plan data

Purge import data

Approve calculated data

Purge approved data

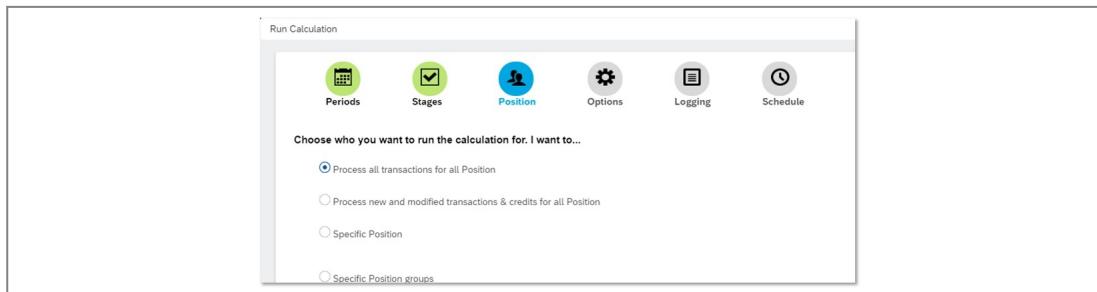
4. Leave *Do you want to run calculations for multiple periods?* Set to No. Leave the calendar and period at Main Monthly Calendar/January 2022. Select Next.



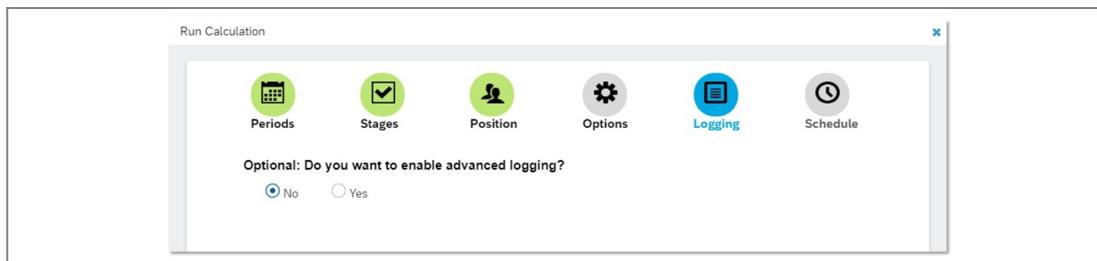
- Leave the stage selections at the default (Run an individual Compensate and Pay Stage). Select Next.



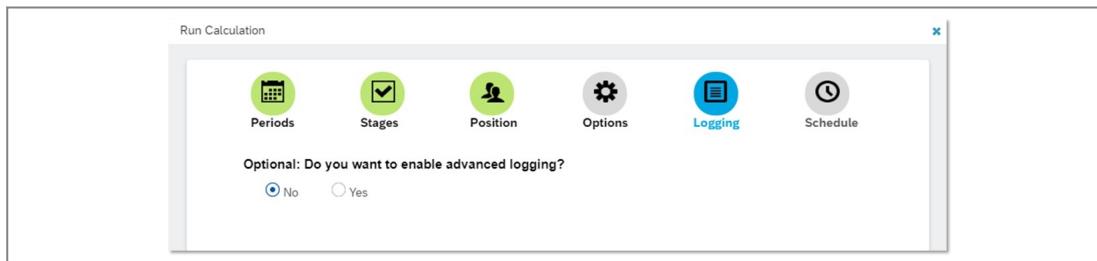
- Select the option to process all transactions for all positions. Select Next.



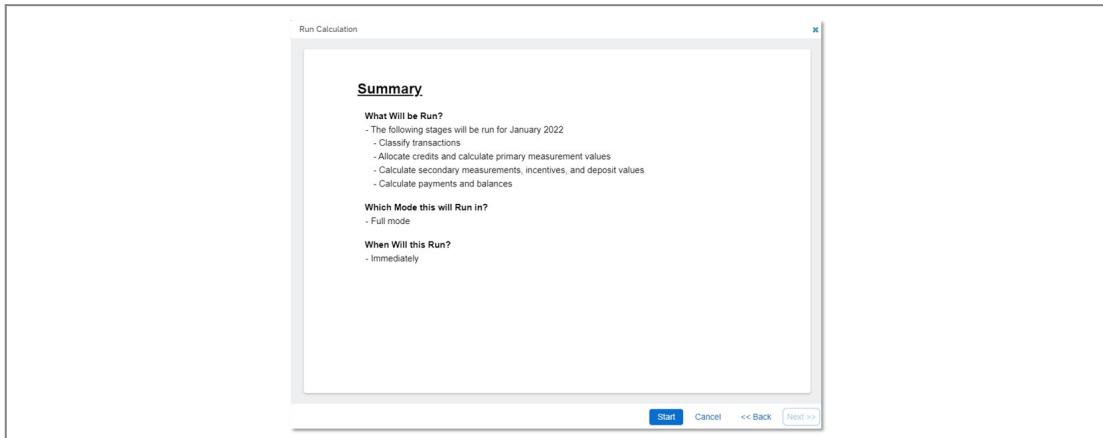
- Do not enable advanced logging. Select Next.



- On the scheduling page, select Run Now. Select Next.



9. On the Summary page, verify your settings are correct and select Next.



Unit 5 Solution 18

Exercise: Run Compensate and Pay in the User Interface

Business Example

In this exercise, you will run Compensate and Pay to calculate results for our payees based on transactions in January 2022.



Simulation

For more information on this topic please view the simulation in the lesson *The Compensate and Pay Sequence* in your online course.

1. From the Run menu, select *Pipeline*.
2. Select the *Run a Pipeline* icon.

A screenshot of the Pipeline Summary screen in a software application. The left sidebar shows navigation options like Home, Organization, Plan Data, Compensation Elements, Plan Communicator, Run, and Pipeline. The Pipeline section is selected. The main area displays a table titled 'Pipeline Summary' with columns: Start Time, Run Stage, Period, Status, Stop Time, and Mode. There are 10 rows of data, each representing a successful run from December 2021 down to June 2021. A yellow box highlights the 'Run' icon in the sidebar and the first row in the table.

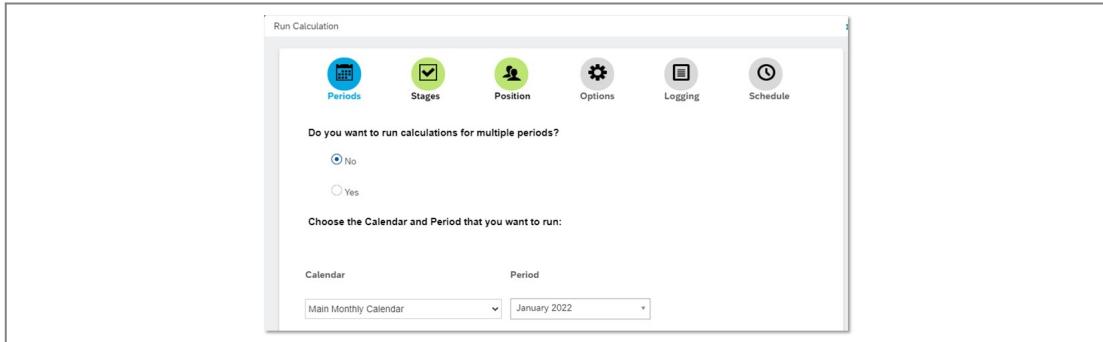
Start Time	Run Stage	Period	Status	Stop Time	Mode
9/29/2022, 12:44 PM	Compensate And Pay	December 2021	Successful	9/29/2022, 12:45 PM	Full
9/29/2022, 12:43 PM	Compensate And Pay	November 2021	Successful	9/29/2022, 12:44 PM	Full
9/29/2022, 12:42 PM	Compensate And Pay	October 2021	Successful	9/29/2022, 12:43 PM	Full
9/29/2022, 12:41 PM	Compensate And Pay	September 2021	Successful	9/29/2022, 12:42 PM	Full
9/29/2022, 12:40 PM	Compensate And Pay	August 2021	Successful	9/29/2022, 12:41 PM	Full
9/29/2022, 12:40 PM	Compensate And Pay	July 2021	Successful	9/29/2022, 12:40 PM	Full
9/29/2022, 12:39 PM	Compensate And Pay	June 2021	Successful	9/29/2022, 12:40 PM	Full

3. Select Run a compensation calculation for all sales deals and select Next.

A screenshot of the 'Run Calculation' dialog box. The question 'What type of job do you want to perform? I want to...' is displayed. Below it is a list of five radio button options:

- Run a compensation calculation for all sales deals
- Import data from stage
- Import plan data
- Purge import data
- Approve calculated data
- Purge approved data

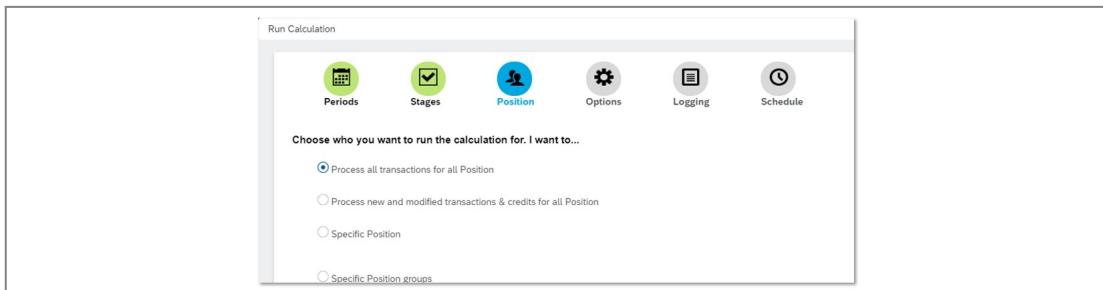
4. Leave *Do you want to run calculations for multiple periods?* Set to No. Leave the calendar and period at Main Monthly Calendar/January 2022. Select Next.



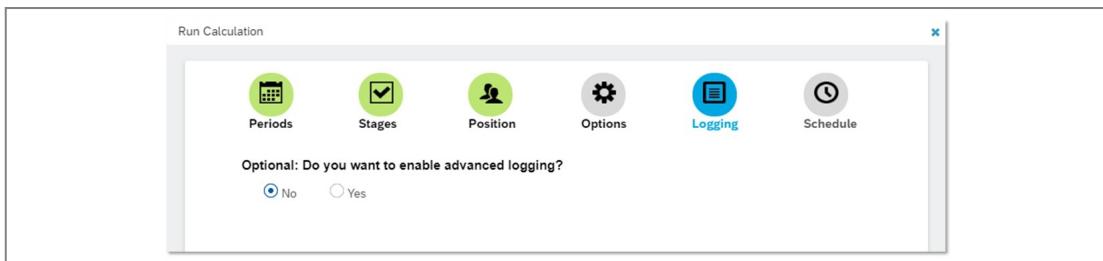
5. Leave the stage selections at the default (Run an individual Compensate and Pay Stage). Select Next.



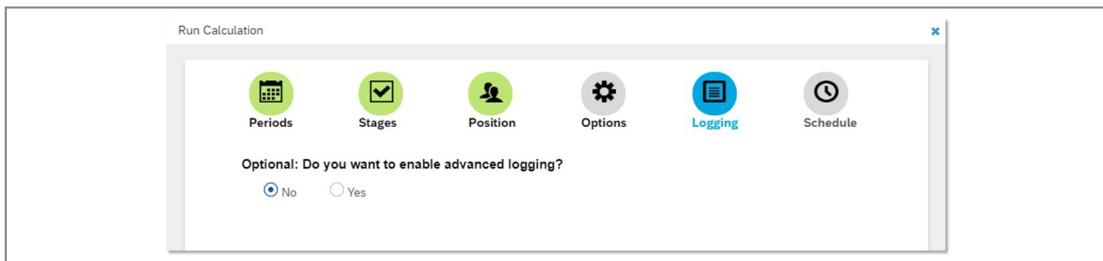
6. Select the option to process all transactions for all positions. Select Next.



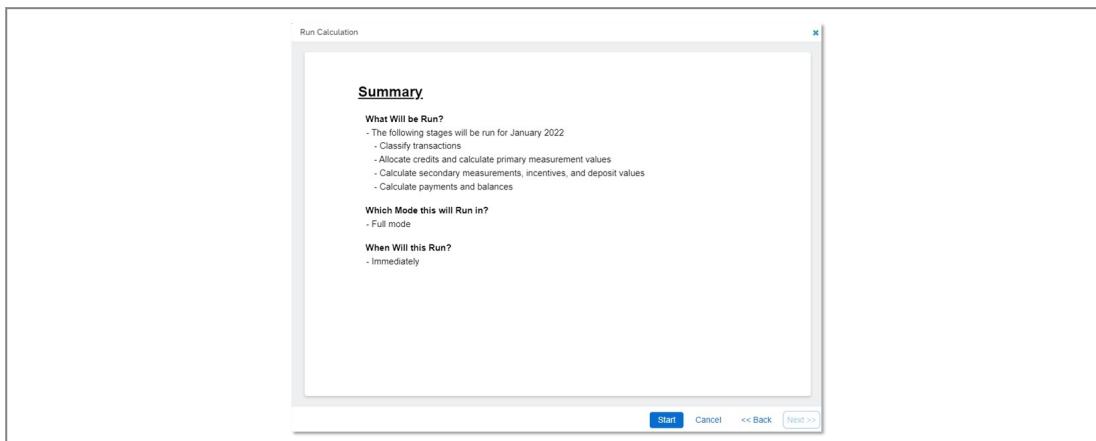
7. Do not enable advanced logging. Select Next.



8. On the scheduling page, select Run Now. Select Next.



9. On the Summary page, verify your settings are correct and select Next.





LESSON SUMMARY

You should now be able to:

- Name and describe the stages of the compensate and pay sequence of the pipeline

Unit 5

Lesson 4

Calculation Results



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Review calculation results and log files
- Define payments and balances
- Describe the functionality of the post and finalize tasks
- Manually create and adjust transactions, credits, and deposits

Calculation Results

The calculation is typically run at least once per calendar period. This generates results data that can be viewed for each phase based on compensation processing for each period. Using the associated results workspaces, compensation can be tracked from transactions to payments for specific periods.

Once a calculation is run, the Pipeline Details pane displays a summary of results, as well as information regarding Stage Statistics, Errors and Logs.



The screenshot shows the Pipeline Details pane with the following interface elements:

- Pipeline Summary:** A table listing pipeline runs. One run is selected, showing details: Start Time: 9/29/2022, 10:21 AM; Run Stage: Compensate And Pay; Period: January 2022; Status: Successful; Stop Time: 9/29/2022, 10:22 AM; Mode: Full; Date Submitted: 9/29/2022, 10:21 AM; Date Scheduled: 9/29/2022, 10:09 AM.
- Pipeline Details:** A tabbed section with three tabs: Stage statistics (selected), Errors, and Logs.
- Stage statistics:** A table showing stages and their performance metrics. Two stages are listed:
 - Create Default Data stage:** Errors: 0, Duration: Less than a minute. Start time: 9/29/2022, 10:22 AM; End time: 9/29/2022, 10:22 AM.
 - Reset From Classify stage:** Errors: 0, Duration: Less than a minute.
- Run Parameters:** A panel on the right showing various parameters for the run, such as Run initiated by, Run type, Run stage, Run mode, and Run statistics.

Figure 66: Pipeline Results

The Stage Statistics tab shows information about the processing of each individual stage.

The Errors tab shows brief information about any errors produced by the pipeline run. If you see an error, this tab shows specific information that helps with troubleshooting.

The Logs tab contains links to each log file generated by the pipeline. As we saw earlier, each stage produces a log file. You can use log files to help diagnose pipeline and rule behavior, and to browse errors, warnings, and processing statistics.

To view log files from the Pipeline Results workspace:

1. Select the Logs tab
2. Expand the stage containing the log you wish to see.
3. Select the link to the log file.

This downloads the log as a text file.

To learn more about viewing and interpreting logs, watch the following videos:



Video: Introducing Pipeline Log Files in SAP Commissions

For more information on *Introducing Pipeline Log Files in SAP Commissions*, please view the video in the lesson *Calculation Results* in your online course.

[Introducing Pipeline Log Files in SAP Commissions](#)

Once the calculation is complete, the results of the compensation rules can be viewed in their respective workspaces. Results data is associated with the period for which the pipeline was run.

Each type of compensation rule has its own results workspace, which is populated with the output for each position assignment for the period. You can see the results workspaces under the Calculation menu.



Figure 67: Calculation Results

Some results can be edited manually in the workspace, while others can only be updated by updating a rule and re-running Compensate and Pay.

Editable results are Orders, Transactions, Credits, and Deposits.

Read-only results are Measurements, Incentives, Commissions, and Payments.

Payments And Balances

The final result of the Compensate and Pay Sequence is either a *Payment* or a *Balance*.

A *Payment* is the amount that is paid out for the period, taking into account outstanding balances from prior periods and other adjustments.

Deposits with the same Position Assignment, Period, and Earning Group are combined to create a single *Payment*. *Payments* also incorporate outstanding balances from prior periods.

As a result, it is possible for the value of the Payment to be different from the value of the Deposit for a period.

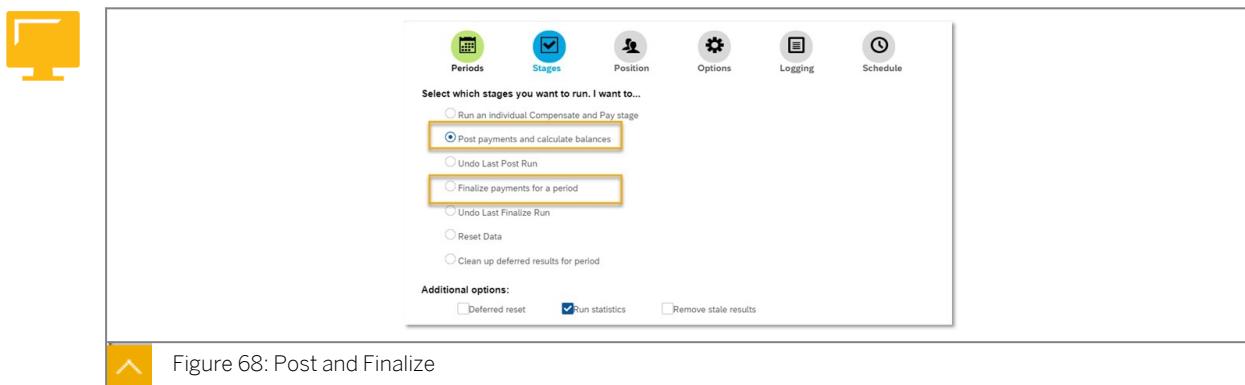
A Balance is the difference between the amount paid and the amount owed to a payee. This may be simply because the payment amount is negative. However, a Balance can be negative or positive.

One reason a balance can be generated is if a result is calculated for a period that has been finalized. Since by definition no new payments can be generated for a finalized period, that amount will be generated as a balance, which is then applied to the payment for the next unfinalized period.

Keep in mind that payments are in the context of the Position, not the Participant.

Post and Finalize

Post and Finalize are additional calculation stages that are run after Compensate and Pay.



Post: During the Post stage, payments and balances from the Pay stage are permanently stored. Each posted payment represents a payout to a participant. This stage is generally run only once at the end of the period, although it can be run multiple times if needed.

Key points regarding the post stage:

- The Post stage should be run only after Compensate and Pay.
- Once a payment or balance has been marked as posted, it can't be reset.
- If you rerun the Pay stage for payments that are marked as posted, the Post stage creates a new posted payment.
- Once a payment has been posted, it can't be modified.
- Post can be run for a specific Position Group.

Finalize: Finalizing a period stops any new compensation from being paid in the current period. Further transactions, credits, or deposits can be processed in a finalized period, but any values that are calculated are marked as a balance for payment, in the next open period.

Key points regarding the Finalize stage:

- The Finalize stage should be run only after Post has been run.
- No new payments can be generated for a period that has been finalized.
- Finalize can be run for a specific Position Group.

Both Post and Finalize have an Undo option. However, it's important to be careful with this feature, as it only affects the most recent Pipeline run.

Payments And Balances Example

The following example demonstrates how five different Calculations impact payments and balances over time:



Calculation Run Date	Calculation Period	Deposits	Trial Payments	Posted Payments	Finalized	State
1/31/2022	January 2022	\$100	\$100	\$100	No	
2/10/2022	January 2022	\$120	\$20	\$20	Yes	Incremental Deposit
2/28/2022	February 2022	\$200	\$200			Trial Payment
3/05/2022	January 2022	\$130	\$10	\$10		Posted Balance
3/15/2022	February 2022	\$200	\$210	\$210		Applied Balance

Figure 69: Payments and Balances Example

1. The first calculation generates a posted payment of \$100 for January. This means that the Post process has been run, and \$100 has been sent to payroll.
2. The second calculation shows that additional earnings need to be paid for January. This is an incremental deposit. Because the original \$100 has been posted, it cannot be modified. Compensate and Pay is rerun, followed by Post. The incremental amount is posted and the additional payment of \$20 will be paid for January. Finalized was also run, so no additional payment is made for January.
3. The third calculation identifies a trial payment of \$200 for February. This payment has not yet been posted, so no actual payment has been made. This means this amount can still be modified.
4. The fourth calculation, while done in March, is for the January period. The deposit indicates that an additional \$10 should have been applied in January. Since January is already finalized, this amount is stored as a balance, which can be applied to the next open period (February in this case).
5. The fifth calculation shows that earnings for February remain at \$200, but when Pay and Post are run, the \$10 balance is applied resulting in a payment of \$210 for February.

Manually Entering Transactions, Credits, and Deposits

Transactions, Credits, and Deposits can be manually created, modified, or adjusted.

Data can be:

- Imported from source systems
- Entered manually through the user interface
- Credits and Deposits calculated by plan rules

Many reasons to manually enter or adjust information exist. Some examples are:

- A transaction wasn't created before the end of the compensation period, preventing the payee from receiving a bonus or accelerated commission.
- A transaction was preassigned to the wrong payee.

- Management would like to split a credit between the original payee and another person who helped with a sale.
- The CEO would like to pay an ad-hoc bonus to a small set of payee outside of the compensation plan rules.

Unit 5

Exercise 19

Exercise: Create a Manual Deposit

Business Example

In this exercise, we will create a manual deposit in the amount of \$1000 and assign it to Joyce Fisher, the Sales Rep for the Central region. We will then re-run the Pay stage to create a new Payment.



Simulation

For more information on this topic please view the simulation in the lesson *Calculation Results* in your online course.

1. Select Calculations.

The screenshot shows the SAP Fiori Launchpad with three main sections: 'Manage Organization', 'Manage Plans', and 'Review Calculations'. The 'Review Calculations' section contains a 'Run' button and a 'Calculations' button, which is highlighted with a yellow box.

2. Select Deposits.

3. Select Add.

4. Select Position to open a dropdown list.

The screenshot shows the 'Deposit Details' form. In the 'Position' field, the text 'SR-C2' is entered, and a dropdown menu is open, showing 'SR-C2 (Joyce Fisher)' as the selected option.

5. Enter SR in the position box.

6. Select SR-C2 (Joyce Fisher).

The screenshot shows the 'Deposit Details' form. The 'Position' field now displays 'SR-C2 (Joyce Fisher)' as the selected value.

7. Enter Bonus Correction Deposit in the name box.

8. From the *Earning Group* dropdown list, select *Bonus*.
9. From the *Earning Code* dropdown list, select *Bonus*.
10. Enter 1000 in the value box and select *USD* from the dropdown list.
11. Enter *Bonus Correction per Director* in the comments box.
12. Select *Create*.

The screenshot shows the 'Deposit Details' form with the 'General Information' tab selected. The form is divided into several sections:

- Standard Fields:** Includes fields for 'Participant' (set to 'Position'), 'Period' (set to 'January 2022'), 'Role', 'PredAdjusted', and 'Reason Code'.
- Position:** Shows 'Name' as 'Bonus correction deposit'.
- Title:** Shows 'Value' as '\$1,000.00' and 'USD'.
- Earning Group:** Shows 'Bonus'.
- Earning Code:** Shows 'Bonus'.
- Release Date:** Shows 'Ever Held' checked.
- Business Unit:** Shows 'BikesInMotion'.
- Comments:** Shows 'Bonus Correction per Director'.
- Calendar:** Set to 'Main Monthly Calendar'.
- Create Date:** Placeholder for date.
- Origin Type:** Set to 'manual'.
- Deposit Date:** Placeholder for date.

At the top right of the form, there are 'Create' and 'Cancel' buttons.

Unit 5

Solution 19

Exercise: Create a Manual Deposit

Business Example

In this exercise, we will create a manual deposit in the amount of \$1000 and assign it to Joyce Fisher, the Sales Rep for the Central region. We will then re-run the Pay stage to create a new Payment.



Simulation

For more information on this topic please view the simulation in the lesson *Calculation Results* in your online course.

1. Select Calculations.

The screenshot shows the SAP Fiori Launchpad with three main sections: 'Manage Organization', 'Manage Plans', and 'Review Calculations'. The 'Review Calculations' section contains a 'Run' button and a 'Calculations' button, which is highlighted with a yellow box.

2. Select Deposits.

3. Select Add.

4. Select Position to open a dropdown list.

The screenshot shows the 'Deposit Details' form. In the 'Position' field, the text 'SR-C2' is entered, and a dropdown menu is open, showing 'SR-C2 (Joyce Fisher)' as the selected option.

5. Enter SR in the position box.

6. Select SR-C2 (Joyce Fisher).

The screenshot shows the 'Deposit Details' form. The 'Position' field now displays 'SR-C2 (Joyce Fisher)' as the selected value.

7. Enter Bonus Correction Deposit in the name box.

8. From the *Earning Group* dropdown list, select *Bonus*.
9. From the *Earning Code* dropdown list, select *Bonus*.
10. Enter 1000 in the value box and select *USD* from the dropdown list.
11. Enter *Bonus Correction per Director* in the comments box.
12. Select *Create*.

The screenshot shows the 'Deposit Details' form with the 'General Information' tab selected. The form is divided into several sections:

- Standard Fields:**
 - Participant:** A dropdown menu showing 'Period' with 'January 2022' selected.
 - Position:** A dropdown menu showing 'Name' with 'Bonus correction deposit' selected.
 - Title:** A dropdown menu showing 'Value' with '\$1,000.00' and 'USD' selected.
 - Period:** A dropdown menu showing 'Earning Group' with 'Bonus' selected.
 - Release Date:** A dropdown menu showing 'Earning Code' with 'Bonus' selected.
 - Business Unit:** A dropdown menu showing 'Ever Held' with 'BikesInMotion' selected.
 - Comments:** A text input field containing 'Bonus Correction per Director'.
- Pre/Adjusted:** A dropdown menu showing 'Reason Code' with 'BikesInMotion' selected.
- Origin Type:** A dropdown menu showing 'Deposit Date' with 'manual' selected.

At the top right of the form, there are 'Create' and 'Cancel' buttons.

Best Practices for Pipelines

- The first time you run Compensate and Pay in each period, run in Full Mode.
- Before running Post, always run Compensate and Pay in Full Mode.
- Only use Advanced Logging when testing or troubleshooting.
- Make sure any errors that come up in testing are resolved before moving to production.



LESSON SUMMARY

You should now be able to:

- Review calculation results and log files
- Define payments and balances
- Describe the functionality of the post and finalize tasks
- Manually create and adjust transactions, credits, and deposits

Learning Assessment

1. You need to remove a set of records from the staging tables because they have already been imported. Which pipeline task would you use to do this?

Choose the correct answer.

- A Remove Import Data
- B Import Plan Data
- C Purge Import Data
- D Purge Approved Data

2. Where would you go to fine tune the settings for pipeline runs?

Choose the correct answer.

- A System Preferences
- B User Preferences
- C Pipeline Preferences
- D Calculation Preferences

3. What are the four stages of Compensate and Pay?

Choose the correct answer.

- A Classify, Allocate, Reward, Pay
- B Allocate, Reward, Pay, Post
- C Allocate, Pay, Post, Finalize
- D Classify, Allocate, Pay, Post

4. Which of the following is true regarding the Post task?

Choose the correct answer.

- A It can only be run once in a period.
- B It can be run for a specific Position Group.
- C It creates trial payments and balances.
- D No new payments can be created after it is run.

5. How can you control the amount of information written to the pipeline log files?

Choose the correct answer.

- A Select *Enable Advanced Logging* when running the pipeline.
- B Create a support ticket requesting advanced logging be enabled.
- C Select *Enable Advanced Logging* in System Preferences
- D Run the pipeline in Full Mode.

6. If a pipeline returns an error, where can you quickly see information on the cause of the error?

Choose the correct answer.

- A The Logs tab
- B The Errors tab
- C The Stage Statistics tab
- D The log files

7. The amount paid out for a period, taking into account outstanding balances and other adjustments, is called a:

Choose the correct answer.

- A Balance
- B Deposit
- C Earning
- D Payment

8. Which of the following is a list of results that can be manually created or edited in the SAP Commissions user interface?

Choose the correct answer.

- A Transactions, Credits, and Incentives
- B Credits, Measurements, and Incentives
- C Transactions, Credits, and Deposits
- D Credits, Incentives, and Deposits

UNIT 6

Communicating with your Payees

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Creating Dashboards

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UNIT OBJECTIVES

- Enable or disable plan communicator features in SPM
- Designate a proxy
- Create a document that communicates a compensation plan to payees
- Create a document distribution with a workflow
- Configure a dispute template
- Create dashboards
- Enable the release periods feature in dashboards
- Identify the various types of widgets

Configuring Communication options



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Enable or disable plan communicator features in SPM
- Designate a proxy

Enabling Plan Communicator

You now know how to create compensation plans and generate results that are communicated to your payroll team. From the point of view of compensation, our job is done, but an important part of compensation management is keeping the lines of communication open between you and your payees.

In this unit, we'll cover two features that enable this communication: *Plan Communicator* and *Dashboards*. Each of these features is enabled by default, but they can be enabled or disabled in the Sales Performance Home – Global Settings.

Plan Communicator

Plan Communicator is an easy-to-use tool that allows the compensation administrator to manage two-way communication about compensation plans with payees. It has two modules: *Document Distribution* and *Dispute Management*. Both of these modules include the ability to customize communications and create a basic workflow.

Use Plan Communicator to:

- Create and distribute plan documents
- Create a document distribution workflow
- Track the acceptance of plan documents
- Create and Track Disputes

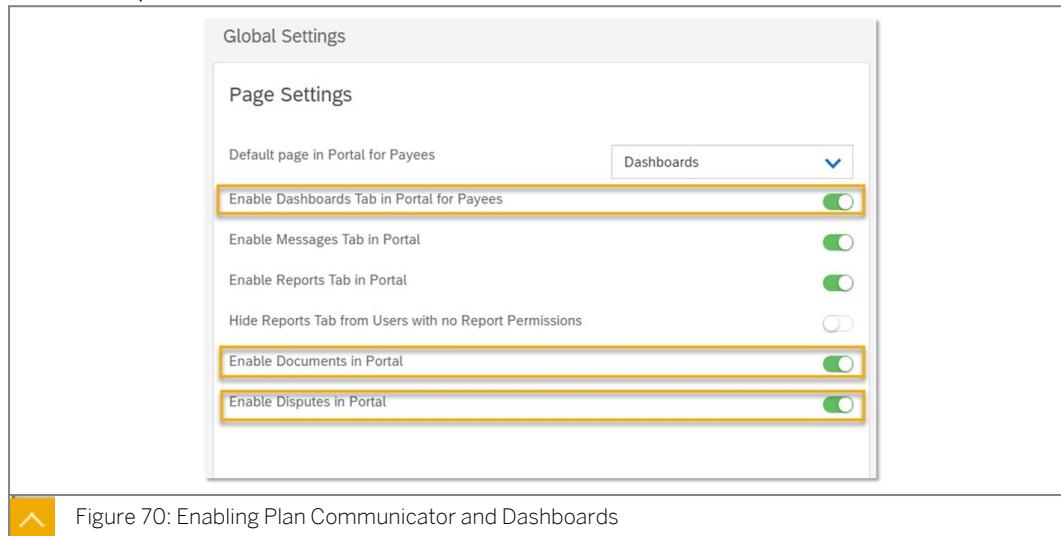
Dashboards

Dashboards are a fast and easy way to retrieve the information that matters to payees the most. They are made up of a collection of *widgets*, arranged on a single screen to provide payees with a comprehensive overview.

To enable or disable Document Distribution, Dispute Resolution, and Dashboards:

1. Select Sales Performance Home from the application picker in the upper right.
2. On the Sales Performance Home Page, select *Global Settings*.
3. Enable or disable any of the following settings:

- Enable Dashboards Tab in Portal for Payees
- Enable Documents in Portal
- Enable Disputes in Portal



4. Scroll to the bottom of the page and select Save.

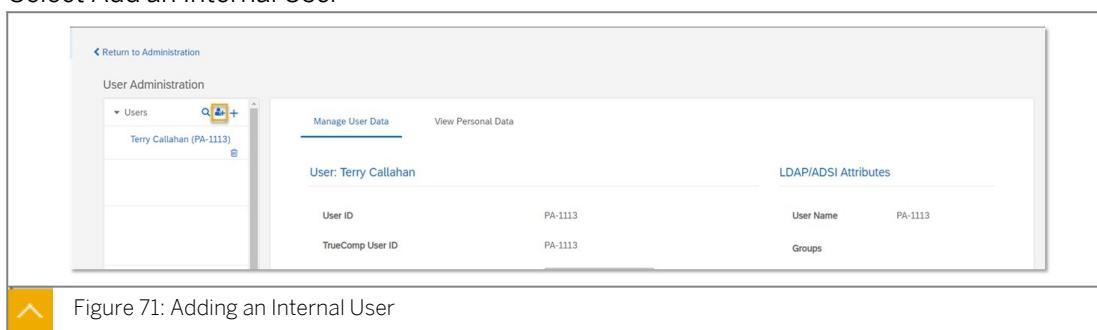
Proxies

Since we'll be designing features to communicate with payees, it's a good idea to set yourself up to proxy as one or two payees. This enables you to test communications and ensure that visibility to payee compensation data is correct.

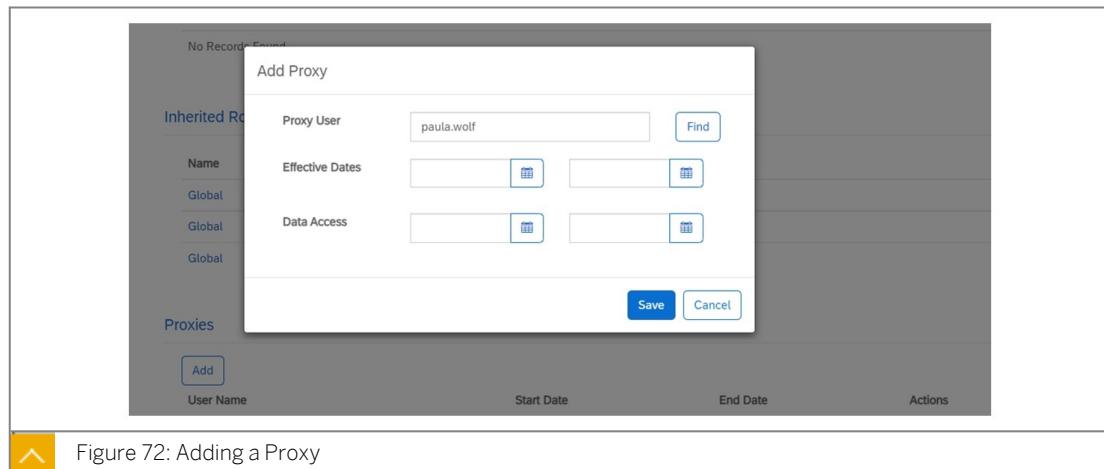
Only an administrator can designate a proxy.

To designate yourself as a proxy for a payee, the payee is added as an internal user in the User Administration page. To do this:

1. Return to the Sales Performance Home page by selecting *Return to Administration*.
2. Select User Administration
3. Select Add an Internal User



4. Enter the User ID for the payee and select *Add*. This will add the payee to the list of users in the left panel.
5. Select the new user and scroll down to the Proxies section. Select *Add*.
6. Enter the User ID for the user who will need to proxy as the payee. Select *Save*.



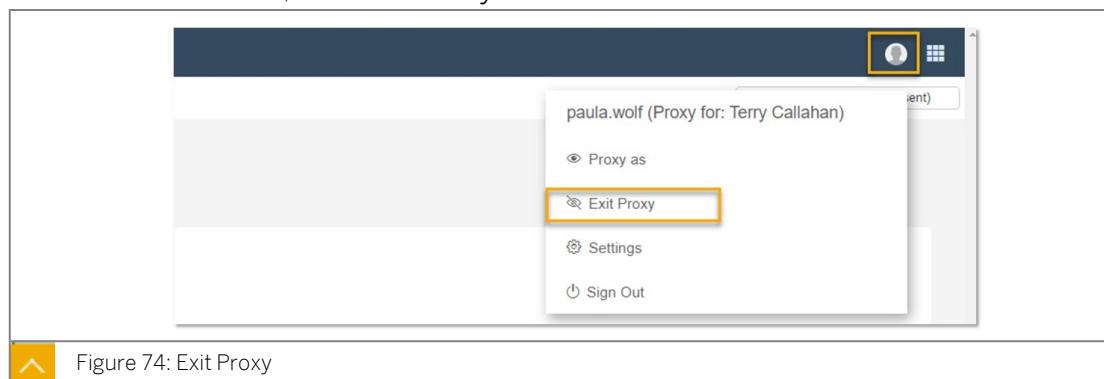
Once you have been granted the ability to proxy as another user, you can now enter proxy mode:

1. From the profile menu in the upper right, select *Proxy As*.
2. Enter the user for which to proxy.
3. Enter your own password and select *Proxy*.



To exit proxy mode:

1. From the Profile menu, select *Exit Proxy*.



LESSON SUMMARY

You should now be able to:

- Enable or disable plan communicator features in SPM
- Designate a proxy

Creating a Document Distribution



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a document that communicates a compensation plan to payees
- Create a document distribution with a workflow

Compensation Plan Documents



Video: Document Distribution in SAP Commissions

For more information on *Document Distribution in SAP Commissions*, please view the video in the lesson *Creating a Document Distribution* in your online course.

Watch the video on '[Document Distribution in SAP Commissions](#)'.

The Document Distribution tool allows an administrator to create and distribute documents to payees using a basic workflow. You can create two types of documents to distribute:

- Plan documents are dynamic documents that can be distributed to each individual payee to communicate details of their individualized plan. To create a Plan document, set the form type to *Plan*. This will allow them to pull plan data into the document to make the document creation process easier, faster, and more accurate.
- Other documents allow you to distribute static documents, such as employee manuals or non-disclosure agreements, to your payees for acceptance. Usually these documents are distributed as PDF files. To create a static document, set the form type to *Other*. This prompts the user to attach a PDF or other static file. Use this option to send static documents such as Non-Disclosure Agreements.

Document Distribution has three sections:

- Documents
- Distributions
- Distributions Tracking

To create a document distribution:

- Create the document
- Create the distribution and workflow settings
- Distribute the document

- Track the distribution

Creating a Plan Document

When creating a document using the Plan form type, the Document workspace works much like a text editor.

- Use the toolbar to customize the form, insert a logo, and change the formatting.
- Once you select a compensation plan, it populates compensation elements that are used within that plan. The administrator can then insert those values into the document.



Figure 75: Compensation Plan Document Design

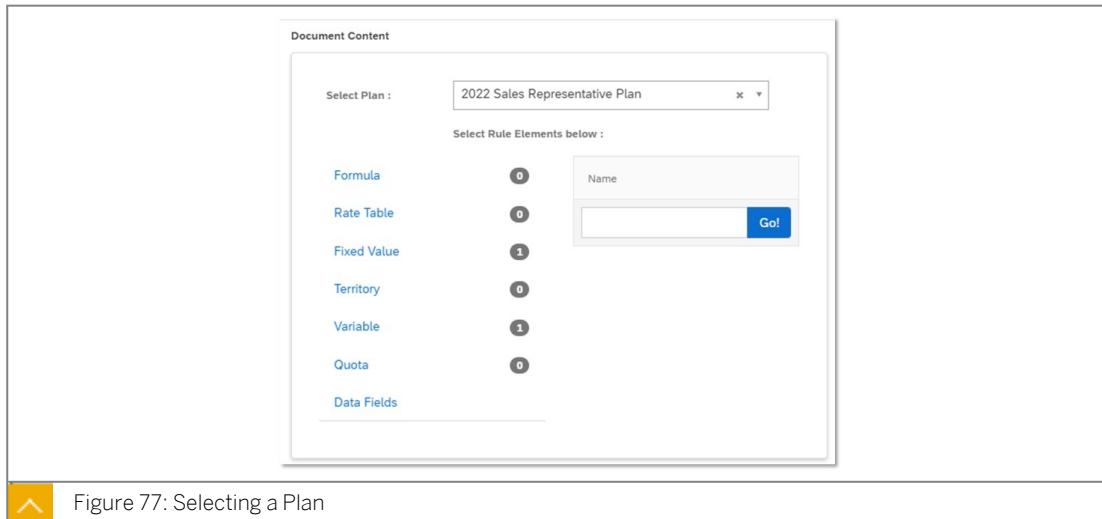
To Create a Plan Document:

1. From the Manage Plans tile, select *Plan Communicator – Documents*.

2. Click the Create icon on the Toolbar.

3. When prompted for the effective dates, enter the start and end period for the fiscal year. Unlike the other objects we have created, the end date for plan documents is required.
4. Enter a name for the plan document; for example: *2022 Sales Rep Plan Document*.
5. Leave the Form Type as *Plan*.
6. Select the Business Unit.
7. Under the Document Content section, click the dropdown menu to select the compensation plan.

Once you select a plan, each compensation element will be populated with the number of objects in the plan. In the image below, for example, the plan contains one Fixed Value and one Variable.



8. Now it's time to build the format of the document. Using a combination of text and placeholders, create a document that contains the information you wish to distribute to each payee.
 - To add a placeholder, click the type of object in the left pane, then select the hyperlink with the name of the object.
 - To add placeholders for organization data, use the Data Fields link.
 - A rich text editor above the text area allows you to add formatting such as bullets, bolding, and hyperlinks.
 - Images such as a company logo can be uploaded.
 - See the image above for an example of a document that contains both text and placeholders.
9. Click Create  to save the document.

To create a document that distributes a static document:

1. Click the Create icon on the Toolbar.
2. Enter the start and end period for the fiscal year.
3. Enter a name for the document; for example: *2022 Employee Non-Disclosure Agreement*.
4. Change the form type to *Other*.
5. Select the business unit.
6. Under Document Content, select *Choose File*.

Figure 78: Creating Other Documents

7. Navigate to the location of the static file and select Open.
8. Click Create to save the document.



Creating a Distribution



Video: Managing Plan Communicator Workflows

For more information on *Managing Plan Communicator Workflows*, please view the video in the lesson *Creating a Document Distribution* in your online course.

Watch the video on '[Managing Plan Communicator Workflows](#)'.

Now that you have created one or more documents, you can set up a *Distribution*. A distribution is used to package multiple documents and configure the workflow before distributing them to your payees. You can add up to five documents to a distribution.

The workflow feature in Plan Communicator is designed to allow business users to easily configure a process in which a set of documents is approved and distributed to each payee for acceptance before a plan is put into effect each fiscal year.

The Distributions workspace can be found under Manage Plans – Plan Communicator – Distributions.



Figure 79: Plan Communicator Distributions

To create a distribution:

1. Select *Plan Communicator* → *Distributions*.
2. Click the Create icon
3. Enter the effective start and end date. As with the plan document, both the start and end date are required.

4. Enter a name and an optional description.
5. In the *Documents* section, enter the first few letters of the document name, or alternatively, enter * to display the list of documents. Select the document and click *Add*.

The screenshot shows a software interface for creating a distribution. At the top, there are standard fields: Name (2022 Sales Rep Distribution), Description, Business Unit (BikesInMotion), and Last Modified. Below these are sections for 'Effective Start Date' (1/1/2022) and 'Effective End Date' (12/31/2022). The main area is titled 'Documents and Workflow'. It contains a table with a single row for 'Documents (Required)'. The cell contains a list box with '2022' selected, and an 'Add' button is visible. A note at the bottom states: 'Note :Distribution is limited to up to 5 Documents. Select the checkbox if you want to include / upload the document with Plan Document for Docusign process. (Only word and pdf documents are allowed, and it will be uploaded in same order display here)'.

Figure 80: Adding a Document to a Distribution

6. Repeat this step to add up to five documents.
7. Now it's time to configure the workflow.

The screenshot shows the 'Workflow Settings' configuration page. It includes sections for 'Payee Acceptance' (checkbox checked, input field 3), 'Approver Acceptance' (checkbox checked, input field 3), 'Exclude weekends and holidays' (checkboxes checked for 'Exclude weekends' and 'Exclude holidays'), and 'Reminders' (checkbox checked, input field 1).

Figure 81: Plan Distribution Workflow

- Indicate whether the payee is required to accept the plan document.
- Select the number of days the payee has to accept the plan document.
- Indicate whether the plan should be accepted on behalf of the payee after a certain number of days past the due date.
- Optionally, configure an approval process for the plan document. If the plan must be approved:
 - Indicate whether an approver is required to accept the plan document before it is sent to the payee.
 - If an approver is required, select the number of days to approve.
 - Indicate whether the document is auto-approved after the selected number of days has passed.
 - Select the number of levels of approval. For example, you can require that the plan is first approved by the sales director, then by the sales manager.

- Indicate whether weekends and holidays should be included in the number of days required to accept or approve the plan document.
- Set the number of days after which a reminder is sent to the payee.

8. Click Save.

Generating and Distributing the Plan Documents

Now that the distribution has been configured, you can generate and distribute the plan document to your payees.

Generating the document creates a draft of the plan document for each individual payee. This can be run separately or together with the actual distribution. This then sends the document to payees.

To generate and distribute plan documents:

1. Open the *Distributions* workspace
2. Select, but don't open, the distribution document
3. In the *For Position* section, select the positions to distribute to. Choices are:
 - All positions on plans
 - Selected title
 - Selected position
4. Select *Generate & Distribute*.

Tracking the Distribution

Once the distribution is complete, administrators can view the status in the *Distributions Tracking* workspace. This list can be filtered by distribution, status, position, or participant.



Filters

Distribution (Optional)	Distribution status (Optional)	Position (Optional)	Participant (Optional)	OK	Reset
2022 Sales Rep Distribution	Pending Approval	Begin typing position name	Begin typing participant name	OK	Reset

Distributions Tracking Workspace

Distribution	Position	Start Date	End Date	Generated On	Distributed On	New Assigned to	Distributed By	Due Date	Status	Accept Date	Participant	Documents
2022 Sales Rep Distribution	SSR-EMEA	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Greg Chen		10/28/2022	Pending Approval		Mary Martinez	View
2022 Sales Rep Distribution	SR-E1	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Dan Yang		10/28/2022	Pending Approval		Terry Callahan	View
2022 Sales Rep Distribution	SR-E2	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Dan Yang		10/28/2022	Pending Approval		Ravi Singh	View
2022 Sales Rep Distribution	SR-C2	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Jason Raney		10/28/2022	Pending Approval		Joyce Fischer	View
2022 Sales Rep Distribution	SR-W1	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Barbara Williams		10/28/2022	Pending Approval		Stacey Palowski	View
2022 Sales Rep Distribution	SR-W2	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Barbara Williams		10/28/2022	Pending Approval		Gene Osborne	View
2022 Sales Rep Distribution	SR-CA1	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Jesus Hernandez		10/28/2022	Pending Approval		Sanjay Pavan	View
2022 Sales Rep Distribution	SR-CA2	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Jesus Hernandez		10/28/2022	Pending Approval		Alex Petrovic	View
2022 Sales Rep Distribution	SSR-NA	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Dan Yang		10/28/2022	Pending Approval		Mike Mitchell	View
2022 Sales Rep Distribution	SR-EMEA2	1/1/2022	12/31/2022	10/25/2022, 12:47 PM	10/25/2022, 12:47 PM	Greg Chen		10/28/2022	Pending Approval		Carlos Ortiz	View

Figure 82: Distributions Tracking Workspace

Unit 6

Exercise 20

Exercise: Create and Distribute a Plan Document

In this exercise, you will create a plan document and distribute it to one of our payees, Amy Whitton. To see what the experience will be like for Amy, you'll start by designating yourself as a proxy for her.

1. Designate yourself as a proxy for Amy Whitton.
2. Create a Plan Document.
3. To preview the document for Amy Whitton:

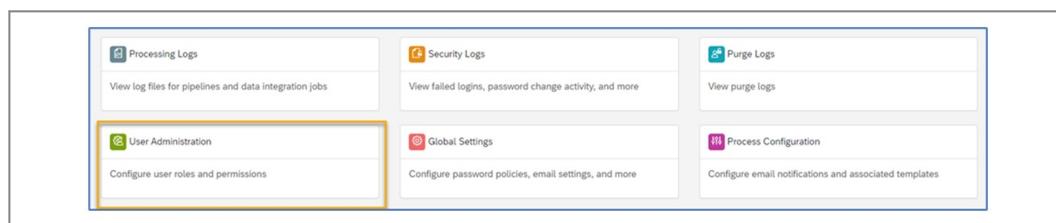
Unit 6

Solution 20

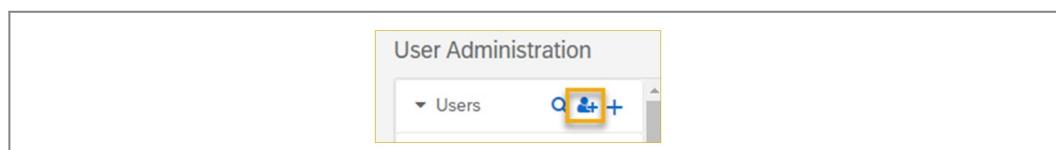
Exercise: Create and Distribute a Plan Document

In this exercise, you will create a plan document and distribute it to one of our payees, Amy Whitton. To see what the experience will be like for Amy, you'll start by designating yourself as a proxy for her.

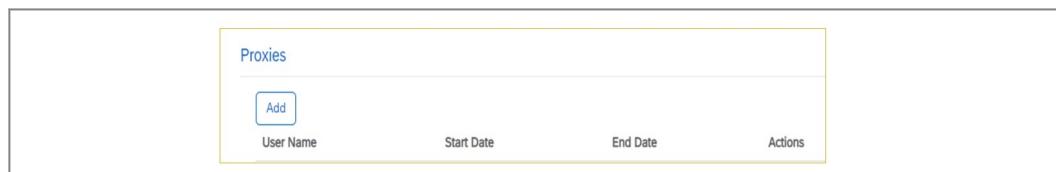
1. Designate yourself as a proxy for Amy Whitton.
 - a) From the *Applications menu*, return to the Sales Performance Home.
 - b) Note : you may need to log back in.
 - c) Click *User Administration*.



- d) Add Amy Whitton as an Internal User.
 - Expand the *Users menu* on the left navigator.
 - Click the *Add Internal User icon*.



- Click *Find* .
- In the First name, type *Amy* and click *Search*.
- Click the link for *PA-1121*.
- Click *Add*.
- Under the Users menu, select the link for *Amy Whitton* .
- Scroll down to Proxies and click *Add*.



Enter your User ID in the Proxy User field and click Save.



Note:

Your User ID is your email address. If you don't remember your User ID, use the Find button to search by your first or last name.

2. Create a Plan Document.

a) Return to Commissions using the application picker in the upper right.

b) Create the Plan Document.

- Click *Plan Communicator - Documents* in the Manage Plans tile.
- Click *Create New Document*.
- Set the Effective Dates from January 2022 through December 2022.
- Type “2022 Sales Rep Compensation” in the Name field.
- Select *Plan* in the Form Type drop down.
- Select *BikeInMotion* in the Business Unit field.
- Select the *Plan* in the Select Plan drop down (Choose 2022 Sales Representative Plan).
- In the text box on the right side, enter the following text:
Welcome to your 2022 Compensation Plan!
Your quarterly quota is:
- Place the cursor on the next line in the text box and use the following steps to add the fixed value that contains the quarterly quota:
 - In the Document Content section, click *Fixed Value*.
 - Click the link with the fixed value *FV_Quarterly_Sales_Quota:quarter* to add the fixed value as a placeholder.

- Optionally, add other fields from the plan details.
- Click Save.

3. To preview the document for Amy Whitton:

a) Click the Preview link in the upper right.

b) Select the link for SR-EMEA1.

- c) To return to the document editor, click *Go to edit view*.



LESSON SUMMARY

You should now be able to:

- Create a document that communicates a compensation plan to payees
- Create a document distribution with a workflow

Managing Disputes and Inquiries



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Configure a dispute template

Managing Disputes and Inquiries



Video: Dispute Management in SAP Commissions

For more information on *Dispute Management in SAP Commissions*, please view the video in the lesson *Managing Disputes and Inquiries* in your online course.

Watch the video on '[Dispute Management in SAP Commissions](#)'.

The Disputes feature streamlines and automates the resolution of disputes and inquiries between payees and the compensation administrator. Commissions payees can submit inquiries either in the SPM Home Page or in a report or dashboard. These initiate a workflow in SAP Commissions that is visible at all stages.

The Disputes feature includes a set of preconfigured templates, and the administrator can create new templates and configure customized workflows.

The benefits of Dispute Management include:

- Streamline the disputes process
- Provides transparency
- Allows all stakeholders to view status in real time

How Disputes Work

If the payee suspects an error in their compensation payment, they can submit a dispute electronically. Once they submit the dispute their direct manager or other approver is notified.

The manager can either, approve, reject, or request more information before sending it on to the compensation team for resolution. At any point in the process, the payee can see the status of the dispute in the SPM Portal, and the administrator can view existing disputes in the Disputes Tracking workspace in SAP Commissions.

Before payees can submit disputes, at least one dispute template should be configured. The system contains a number of templates by default. The administrator can customize an existing template or create new templates if needed.

The Dispute Workflow

The dispute workflow is similar to the document distribution workflow, but with a bottom-up structure that is optimized to allow a payee to submit a dispute for delivery to the compensation team. Optionally, management approval can be added to the workflow.

Reason Codes

When a payee submits a dispute, a Reason for Request field allows them to select from a pick list of options for the dispute. When customizing a dispute template, an administrator can customize this list using the Reason Codes section of the template.

Custom Attributes

The administrator can add custom attributes as fields on the dispute form and indicate whether the field is required. Custom attributes can be generic, number, date, or Boolean.

To create a new dispute template with a workflow:

1. Select *Plan Communicator* → *Disputes*.
2. Select *Create*.
3. Enter the effective start and end date. As with the plan document, both the start and end date are required.
4. Enter a name and an optional description.
5. In the additional settings section, choose between associating the dispute with a particular plan or title. To leave it available for everyone, leave this field blank.

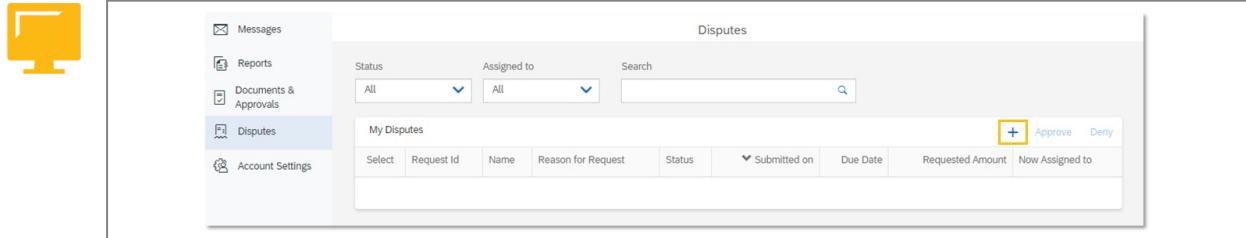
6. In the workflow section, define the level of approval.
 - Indicate whether an approver is required to accept the plan document before it is sent to the resolver.
 - If an approver is required, select the number of days to approve.
 - Indicate whether a resolution is required.
 - Select the number of days in which the dispute must be resolved.
 - Select the name of the resolver. Generally this will be a member of the compensation team. You can add as many additional resolvers as needed.
 - Set the number of days after which a reminder is sent to the resolver.
7. In the Reason Code Configuration section, enter a row for each reason for the dispute. This will populate the pick list for the payee.
8. Select *Next*.
9. To activate custom attributes, check the Active box next to a generic, number, date, or Boolean attribute.

- Enter a custom value with the name of the field you would like displayed to the payee.
- If the field is required, select the required box.

10. Select Create.

Viewing and Resolving Disputes

Payees can submit a dispute by logging in to the Sales Performance Management portal and navigating to the Disputes page. To add a dispute, click the Add (+) icon.



Depending on the workflow settings, the dispute is routed to an approver or directly to the resolver.

Unit 6

Exercise 21

Exercise: Create a Dispute Template

Business Example

In this exercise, you will create a customized Dispute form that payees can use to submit a dispute. You will then proxy as Celia Bates to simulate a new dispute.



Simulation

For more information on this topic please view the simulation in the lesson *Managing Disputes and Inquiries* in your online course.

1. Create a New Dispute Template.
2. Proxy as Amy Whitton
3. Submit a Dispute on behalf of Amy Whitton.

The screenshot shows the SAP Fiori interface for creating a new dispute. The form has the following fields:

- Inquiry Type: My Dispute
- Position: SR-Licenses
- Reason for Request: Missing Bonus Amount
- Requested Amount: 1,000.00 USD
- Employee ID: 10001
- Submitter Comments: (empty)
- Upload File: Choose file, Upload

A 'Create' button is located at the bottom right of the form.

Figure 84: DisputeForm

4. Resolve the Dispute
5. Optionally, proxy as Celia Bates again and check the status of the dispute.

Unit 6

Solution 21

Exercise: Create a Dispute Template

Business Example

In this exercise, you will create a customized Dispute form that payees can use to submit a dispute. You will then proxy as Celia Bates to simulate a new dispute.



Simulation

For more information on this topic please view the simulation in the lesson *Managing Disputes and Inquiries* in your online course.

1. Create a New Dispute Template.
 - a) From the Plan Communicator menu, select *Disputes*.
 - b) Select the *Create* icon.
 - c) Name the template *My Dispute*.
 - d) Select *BikesInMotion* for the Business Unit.
 - e) In the Workflow Settings section, select your name in the *Resolver* field.
 - f) In the Reason Code Configuration section:
 - Type *Missing Bonus Amount* in the *Code* column in the Reason Code Configuration section.
 - In the second code field, type *Incorrect Bonus Amount*.

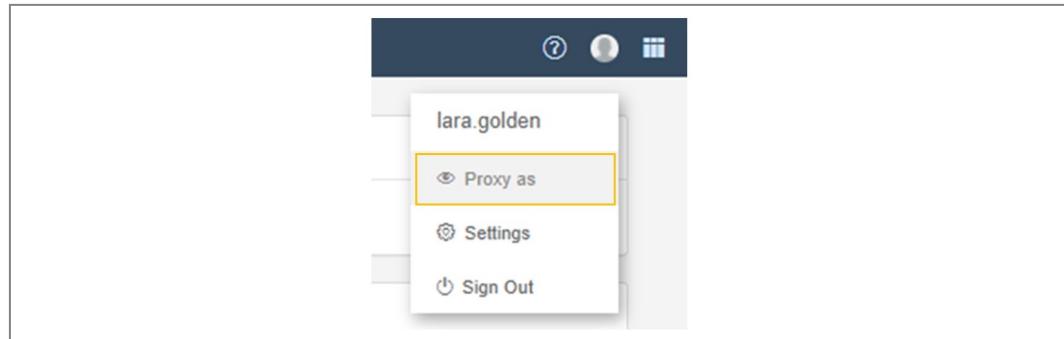
A screenshot of a software interface titled "Reason Code Configuration". It shows two rows of data. The first row has "Missing Bonus Amount" in the "Code" column and an empty "Description" column. The second row has "Incorrect Bonus Amount" in the "Code" column and an empty "Description" column. To the right of the table are three small checkboxes.

- Scroll to the top of the page and click *Next*.
- Add a custom field called *Employee ID* to this Dispute form.
 - Click the box under the *Active* column for the Generic Attribute 1 row
 - Type *Employee ID* in the Custom Value field column.
 - Click the box under the *Required* column.
 - Click *Save*.

What fields should be on the dispute form?				
Active	Attribute	Default Value	Custom Value	Is Required
<input checked="" type="checkbox"/>	Display Name	Dispute Tracking	My Dispute	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Requested Amount	Requested Amount	Requested Amount	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Generic Attribute 1	Generic Attribute 1	Employee ID	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Generic Attribute 2	Generic Attribute 2		<input type="checkbox"/>
<input type="checkbox"/>	Generic Attribute 3	Generic Attribute 3		<input type="checkbox"/>
<input type="checkbox"/>	Generic Attribute 4	Generic Attribute 4		<input type="checkbox"/>

2. Proxy as Amy Whitton

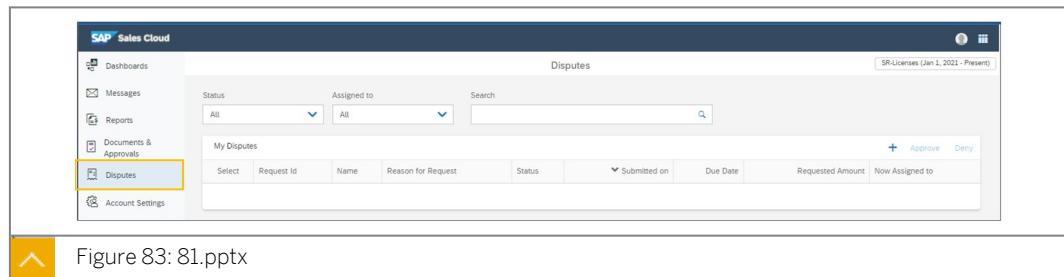
- Use the Application Picker in the upper right to switch from Commissions to Sales Performance Home.
- Click the User menu and select *Proxy As*



- Select Amy Whitton (PA-1121).
- Enter your own password and click *Proxy*.

3. Submit a Dispute on behalf of Amy Whitton.

- Select *Disputes* from the menu on the left.



- Click the *Create* icon.
- From the Inquiry Type menu, select *My Dispute*.
- Complete the rest of the form and click *Create*.

Figure 84: DisputeForm

4. Resolve the Dispute

- From the User menu, select *Exit Proxy*.

- b) Select *Disputes* from the navigator on the left.
 - c) Select the dispute in the list.
 - d) Select the *Resolve* link.
 - e) Add a short comment and select *OK*.
5. Optionally, proxy as Celia Bates again and check the status of the dispute.

Best Practices for Dispute Resolution

- Encourage payees to view the most recent dashboard before submitting a dispute to ensure they have the most current information.
- Encourage payees to attach documentation to their dispute that supports the reason for their dispute.
- Add as many custom fields as needed to the dispute form templates, in order to gather as much data necessary to accurately process the dispute and reduce the amount of back and forth with the payee.



LESSON SUMMARY

You should now be able to:

- Configure a dispute template

Unit 6

Lesson 4

Creating Dashboards



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create dashboards
- Enable the release periods feature in dashboards
- Identify the various types of widgets

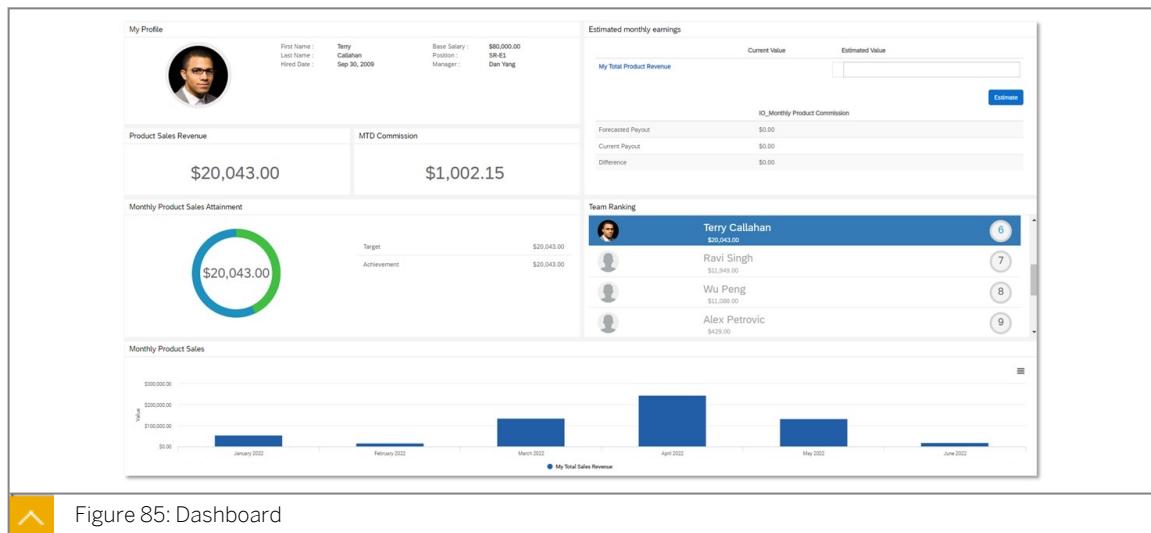
Dashboards

Dashboards are an easy and intuitive way to communicate compensation results and other information to payees, giving them access to the information that matters to them the most.

The compensation administrator creates and maintains various dashboards using the Dashboards page in Sales Performance Home. Dashboards can be created for all payees who share a plan, or all payees who share a title. In addition, a global dashboard can be shared among all payees.

To allow a user to create and manage dashboards, add the user to a role with the Administration - Dashboards permission.

The following image shows a dashboard displaying the results for Terry Callahan for the first 6 months of 2022.



Dashboards are created using widgets. A widget is a window that contains a single piece of data for display in a dashboard. Examples of widgets in the image above are *My Profile*, *Product Sales Revenue*, and *Team Ranking*.

Configuring Dashboards

The Administrator can personalize the Dashboard settings within the Global Settings workspace on the Sales Performance Home page.

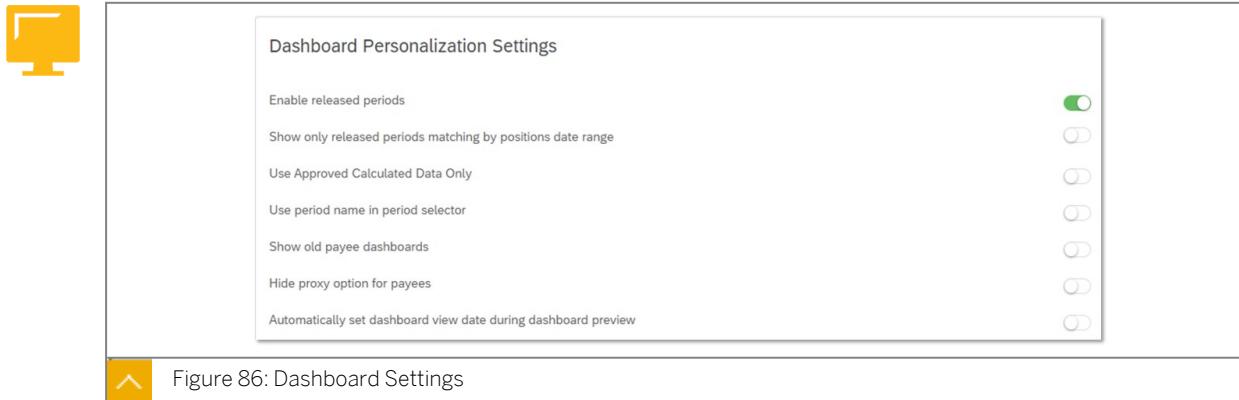


Figure 86: Dashboard Settings

Dashboards are updated automatically when Compensate and Pay is run. However, two features allow you to control the release of data to the payees.

Enable released periods allows you to manually release periods in the Dashboard. If this feature is enabled, payees can view the dashboards for the released periods only, and dashboards aren't updated until you release them. For example, let's say you run Compensate and Pay daily, but you don't want your payees to see an updated dashboard until the 15th of the month. You can release periods for all data, or release periods based on Processing Units and Calendars.

If needed, you can block specific positions or position groups when releasing a period. This is helpful if you're having trouble with the results of only one individual.

If *Use Approved Calculated Data Only* is enabled, a new dataset is created that can be leveraged in dashboards as "approved" data. Administrators can control which data is pushed into the dataset if you need more granular control over the release of data. If this feature is enabled, calculated data will be displayed only after you have also run a pipeline for the *Approve Calculated Data* task. The following image shows how to use the Pipeline to approve calculated data.

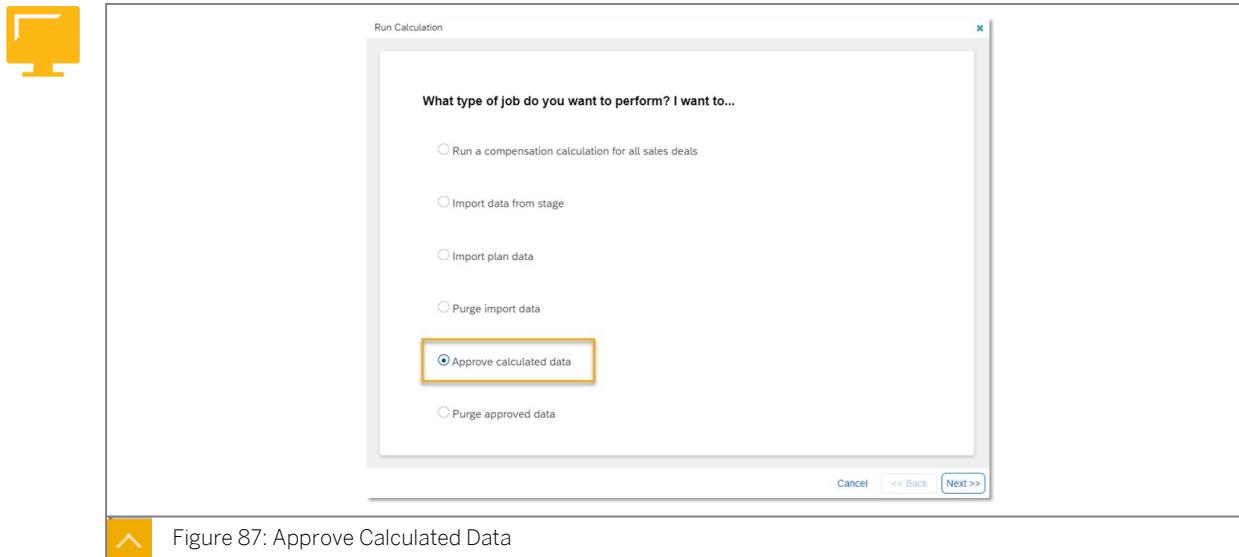


Figure 87: Approve Calculated Data

Key facts regarding dashboards:

- A dashboard can be ‘previewed’ by selecting a payee from the list.
- Period selector can be set to be a Period Name or Date Range in Global Settings in the Sales Performance Home page.
- A Dashboard can have an Effective Date range.
- Dashboards have a View Date, which can be set to a Past date or Future date.
- Dashboards support payees who hold multiple positions.
- Dashboards can be created for Custom Calendars.

Widgets

As we saw earlier, dashboards are made up of *Widgets*. A Widget is a window that displays results or other plan data. They are very easy to configure in the user interface. You can use up to eight widgets per Dashboard. Most widgets are optimized to display payee data, but two widgets display data specifically for managers.

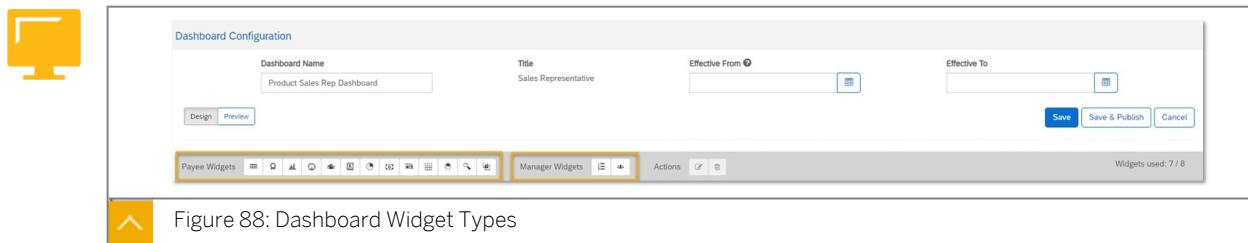


Figure 88: Dashboard Widget Types



Animation: Dashboard Widget Types

For more information on *Dashboard Widget Types*, please view the animation in the lesson *Creating Dashboards* in your online course.

Payee widgets include:

- Payee Profile: displays the payee information such as name, base salary, and manager name.
- Single Performance Metric: displays a single metric, such as the payee’s measurement for the quarter.
- Leaderboard: allows participants to see where they fall within a ranking of their peers.
- Attainment: displays the payee’s attainment of a specific target, shown as a percent.
- Payment: displays the payee payment information.
- Aggregate: aggregates data by multiple attributes.
- Personal Modeler: allows payees to estimate their potential payment.
- Table: displays tabular data on top of the Payee results.
- Quota attainment: displays performance metrics alongside a quota.

Manager widgets include:

- Manager Rank: displays and ranks subordinates by a defined data type.
- My Team: displays a list of subordinates with the capability to view any of their dashboards.

To learn more about various types of widgets, see the following videos:

MyTeam Widget



Video: MyTeam Widget

For more information on *MyTeam Widget*, please view the video in the lesson *Creating Dashboards* in your online course.

Watch the video on '[MyTeam Widget](#)'.

Personal Modeler Widget



Video: Personal Modeler Widget

For more information on *Personal Modeler Widget*, please view the video in the lesson *Creating Dashboards* in your online course.

Watch the video on '[Personal Modeler Widget](#)'.

Aggregate Widget



Video: Aggregate Widget

For more information on *Aggregate Widget*, please view the video in the lesson *Creating Dashboards* in your online course.

Watch the video on '[Aggregate Widget](#)'.

Leaderboard Widget



Video: Leaderboard Widget

For more information on *Leaderboard Widget*, please view the video in the lesson *Creating Dashboards* in your online course.

Watch the video on '[Leaderboard Widget](#)'.

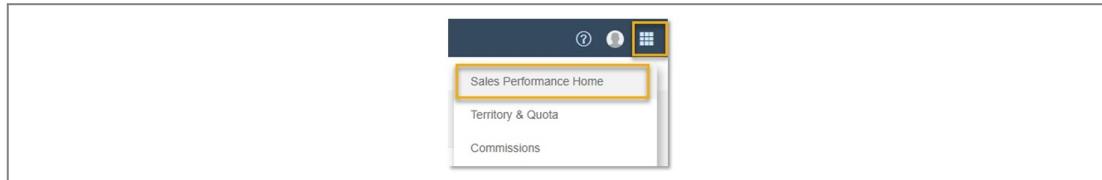
Creating the Dashboard and Adding Widgets

The steps to create a dashboard are:

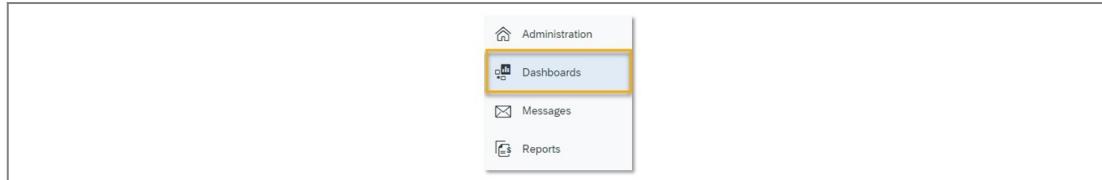
- Decide on the dashboard audience.
- Decide what type of information you would like payees to see on their dashboard
- Create the dashboard using the available widgets using the Dashboard workspace
- Preview the dashboard using several payees as examples
- Publish the dashboard

To create a new dashboard for all sales representatives:

1. Open Sales Performance Home using the application picker in the upper right.

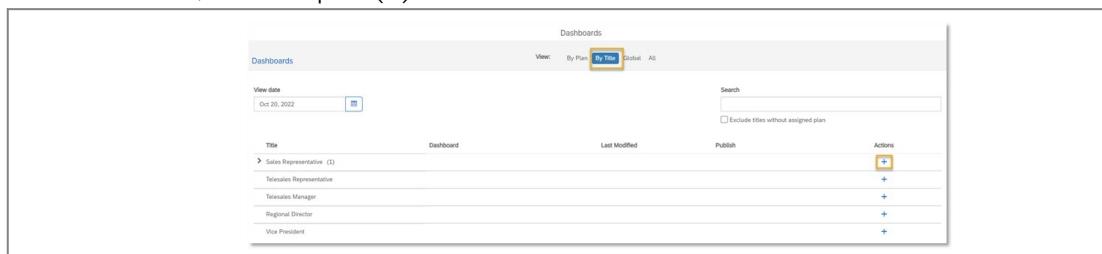


2. From the navigator on the left, select the Dashboards link.



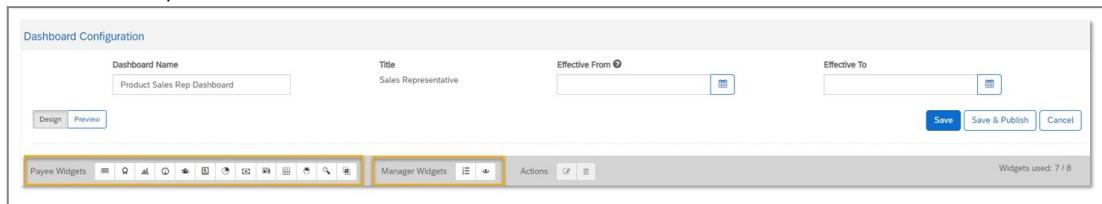
3. Select *By Title*.

4. Next to the title, click the plus (+) icon under the Actions column.



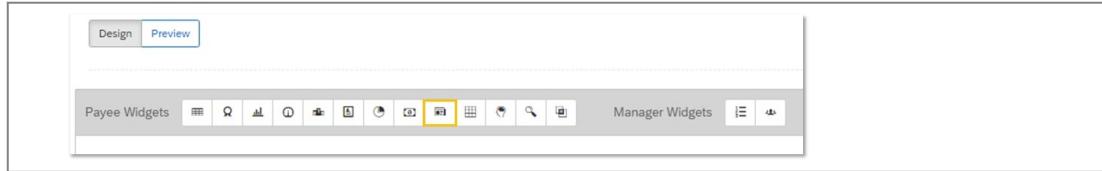
5. Enter a name for the new dashboard.

6. Optionally, enter Effective From and Effective To dates. If left blank, the dashboard will be visible for all periods.



The dashboard must have at least one widget before it can be saved.

7. Add a Free-Form Text widget.

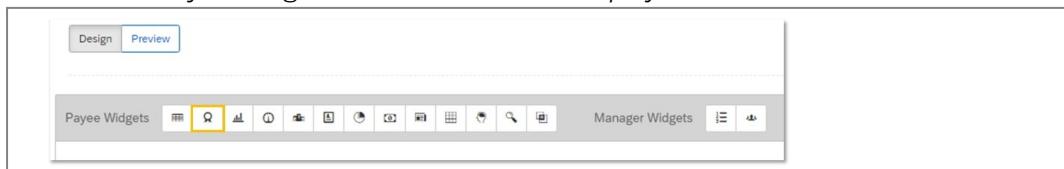


- In the list of Payee Widgets, select the icon for free-form text.
- Enter a name for the widget.
- Enter some text in the editor

The dialog box is titled "Configure Communication". It contains fields for "Widget Title" (set to "Welcome to your Dashboard"), "Help Text" (empty), and a "Hide on Mobile Devices" toggle switch (off). Below these are rich text editor tools and a preview window showing the text "Welcome to your sales performance dashboard". A character count of "Characters remaining: 1956" is displayed. At the bottom are "Apply Changes" and "Cancel" buttons.

- Select *Apply Changes*.
8. To save the new dashboard, select *Create*.
9. Let's add one more widget that displays a single performance metric. In this example, we'll use a primary measurement that returns total sales for the period.

- In the list of Payee Widgets, select the icon for *Display a Performance Metric Value*



- Enter a name for the widget.
- For the performance metric type, select *Measures*.
- Select the name of the measurement.
- In the Field section, select *Value*.

The dialog box is titled "Configure Single KPI". It includes fields for "Widget Title" (set to "My Total Sales"), "Widget Subtitle" (empty), "Help Text" (empty), and a "Hide on Mobile Devices" toggle switch (off). Under "Perf. Metric Type", "Measures" is selected. Under "Measurement", "My Total Sales Revenue" is selected. Under "Field", "Value" is selected. A "Show Difference Since Prior Period" toggle switch is off. A "Enable Drill Down" checkbox is unchecked. At the bottom are "Apply Changes" and "Cancel" buttons.

- Select *Apply Changes*.

To publish a dashboard:

10. Select *Create and Publish*.



LESSON SUMMARY

You should now be able to:

- Create dashboards
- Enable the release periods feature in dashboards
- Identify the various types of widgets

Learning Assessment

1. Where can you enable or disable Plan Communicator features?

Choose the correct answer.

- A Sales Performance Home – Global Settings
- B Sales Performance Home – Plan Communicator Settings
- C System Preferences – General Settings
- D System Preferences – Plan Communicator Settings

2. Where can you designate a user as a proxy for another user?

Choose the correct answer.

- A Sales Performance Home – Global Settings
- B Sales Performance Home – User Administration
- C System Preferences – General Settings
- D Sales Performance Home – Plan Communicator Settings

3. How can you distribute a static document such as an updated non-disclosure agreement to your payees?

Choose the correct answer.

- A Create a document and set the type to Plan.
- B Create a document and set the type to Other.
- C Create a document and set the type to Static Document.
- D Create a document and set the type to Distribution

4. Where do you add the workflow in Plan Communicator?

Choose the correct answer.

- A When creating the document.
- B When distributing the document.
- C When creating the distribution.
- D When creating the plan.

5. You have created and distributed a new compensation plan. Where can you see which payees have accepted the plan?

Choose the correct answer.

- A In SAP Commissions under Plan Communicator – Distribution Tracking
- B In Sales Performance Home under Documents
- C In SAP Commissions under Documents Tracking
- D In Sales Performance Home under Distribution Tracking

6. If a payee sees a discrepancy in their compensation, what can they do to bring it to the attention of the compensation team?

Choose the correct answer.

- A Reply to the document distribution
- B Send an email to the compensation administrator
- C Submit a dispute through Sales Performance Home
- D Submit a dispute in SAP Commissions

7. You need to allow the compensation team five days to resolve a credit dispute. Where can you do this?

Choose the correct answer.

- A On the credit inquiry template, set the number of days to approve.
- B On the deposit inquiry template, set the number of days to approve.
- C On the credit inquiry template, set the number of days to resolve.
- D On the deposit inquiry template, set the number of days to resolve.

8. You wish to prevent payees from seeing their compensation data until the 10th day of the month. How can you do this when configuring a dashboard?

Choose the correct answer.

- A Do not run Compensate and Pay until the 10th day of the month.
- B Enable Released Periods and manually release the period on the 10th day of the month.
- C Enable Use Approved Calculated Data Only and run a pipeline to approve calculated data on the 10th day of the month.

9. How many widgets can you have on a dashboard?

Choose the correct answer.

- A 6
- B 8
- C 12
- D 16

UNIT 7

Embedded Analytics for SAP Commissions

Lesson 1

Overview of Embedded Analytics

267

Lesson 2

Creating Stories with Embedded Analytics

269

Lesson 3

Scheduling and Publishing Stories

275

UNIT OBJECTIVES

- Describe the difference in use cases between Dashboards and Embedded Analytics
- Create a story in Embedded Analytics
- Identify the data models available with Embedded Analytics
- Create a custom data model
- Create a team in Embedded Analytics
- Schedule a publication

Unit 7

Lesson 1

Overview of Embedded Analytics



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the difference in use cases between Dashboards and Embedded Analytics

Using Embedded Analytics

In the unit on *Communicating with your Payees*, we learned to use Dashboards to communicate results data with payees. However, Dashboards aren't ideal for the types of dynamic analytics required by financial and compensation analysts and other stakeholders. Embedded Analytics for SAP Commissions provide tools to analyze live sales performance data that is captured in your SAP Commissions implementation.

Embedded Analytics for SAP Commissions is an implementation of SAP Analytics Cloud. It is used to easily create interactive and dynamic analytics to explore data, find insights, visualize information, and share with colleagues.



Figure 89: Embedded Analytics Benefits

Common use cases include:

- Identify outliers that can be fixed proactively
- Understand incentive commission expense relative to sales/bookings
- Measure the time for sales representatives to reach full productivity
- View operational data
- View historical data and trends
- View data over multiple periods



Video: Uncover Insights with SAP Commissions Embedded Analytics

For more information on *Uncover Insights with SAP Commissions Embedded Analytics*, please view the video in the lesson *Overview of Embedded Analytics* in your online course.

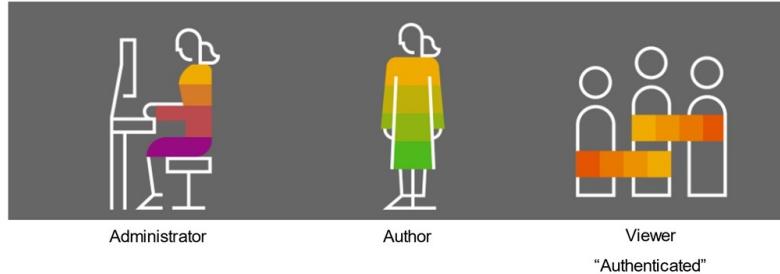
Watch the video on '[Uncover Insights with SAP Commissions Embedded Analytics](#)'.

Populating Embedded Analytics Data

Embedded analytics data is populated when Compensate and Pay is run. However, if you need more control over the timing of data population, you can choose to only use Approved pipeline data. This feature preserves the results of a pipeline run while making only the Approved pipeline stage data available to users.

Before you can use this feature, the Approved Calculated Data flag must be enabled by SAP Support. Once this is done, running a calculation doesn't update credits, measurements, and other results data until an *Approve Calculated Data* pipeline process is run.

User Types



Administrator

Author

Viewer
"Authenticated"



Figure 90: Embedded Analytics User Types

Embedded Analytics has three *user types* that determine the access level of each user: Administrator, Author, and Viewer.

Administrators can perform any activities, including creating folders, creating and editing stories, sharing stories, and adding teams.

Authors can create, edit, and share stories, but they cannot create folders or teams.

Viewers can only view stories and cannot create or edit stories. However, since stories can be dynamic, viewers can apply filters, change the format of charts and tables, and save those changes to a static file such as a PDF.



LESSON SUMMARY

You should now be able to:

- Describe the difference in use cases between Dashboards and Embedded Analytics

Unit 7

Lesson 2

Creating Stories with Embedded Analytics



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a story in Embedded Analytics
- Identify the data models available with Embedded Analytics
- Create a custom data model
- Create a team in Embedded Analytics

Stories and Data Models

A story is a presentation-style document that uses charts, visualizations, text, images, and pictograms to describe data. The image below shows a story that displays credit data in a table and chart. Only users that belong to the Administrator or Author user group can create a new story.



Q1 Credits by Payee	
Full Name	Measures
Alex Petrovic	\$ 55,459.00
Amy Whitton	470,435.00
Barbara Williams	310,443.00
Dan Yang	104,167.00
Gene Osborne	11,465.00
Greg Chen	470,827.00
Jason Raney	52,602.00
Jesus Hernandez	365,323.00
Joyce Fischer	39,510.00
Mary Martinez	392.00
Mike Mitchell	1,283.00

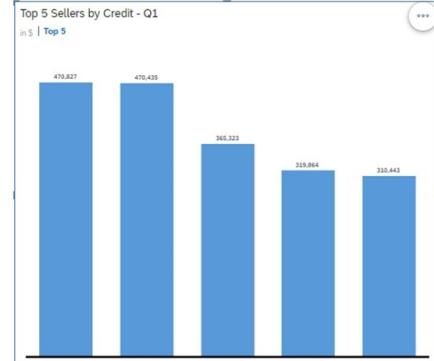


Figure 91: Stories

Widgets are the display objects in a story. Examples of information shown in a widget include tables, charts, images, and text.

To create a story:

1. Open embedded analytics
2. Select the Create (+) icon on the toolbar
3. Select the data model. Data models are discussed in the upcoming topic.
4. A new story with a blank canvas is displayed.

5. Use the icons in the middle of the canvas to add new objects to the story. You can use a chart, table, image, shape, or text.
6. If you add an object such as a chart or table that requires you to select data fields, a builder tool appears on the left side of the canvas.
7. Use this builder to select the information you want to display in the story. For example, for transactions, you may want to display the Order ID, date, product ID, customer name, and value.
8. Use the Save icon on the toolbar to save and name the story.



Video: How to Create a Story in Embedded Analytics for SAP Commissions

For more information on *How to Create a Story in Embedded Analytics for SAP Commissions*, please view the video in the lesson *Creating Stories with Embedded Analytics* in your online course.

To see more detail on how to create a story, watch the video [How to Create a Story in Embedded Analytics for SAP Commissions](#).

Simulation : Create a Story in Embedded Analytics



Simulation

For more information on this topic please view the simulation in the lesson *Creating Stories with Embedded Analytics* in your online course.

Data Models

When you create a new story, you are first prompted to select a Data model. Data models determine which data fields are available for use within each story. Each story in embedded analytics for SAP Commissions is based on a data model.

The data model determines which measures and dimensions can be used for analysis in a story. When first creating a story, you'll be prompted to select the data model that will be used. The following table shows some common data models, a description, whether this data model is available for a payee to view, and whether the period type is based on the fiscal or the Gregorian calendar.

Embedded analytics for SAP Commissions has over 20 data models that are included in every environment. You may notice that many of these data models, such as Credits, Incentives, and Payments, are based on the output of compensation rules. However, some data models are more specialized, such as Model Measurements or Plan Optimizer.

Most data models are available for payees to view as long as they have access to embedded analytics. Two data models, Transactions and Classified Transactions, are visible only to users with access to all data.

Transactions: Data Model includes all transactions across all payees. The Transactions Data Model is based on gregorian periods and is meant exclusively for administrative use. As a recommended practice, stories using this Data Model shouldn't be shared with non-admins, unless they apart of senior management.

Classified Transactions: Data Model includes all classified transactions across all Payees. This model is based on fiscal periods and is meant exclusively for administrative use.

Embedded Analytics Data Models

Select each data model in the following interaction to see a description.



Animation

For more information on this topic please view the animation in the lesson *Creating Stories with Embedded Analytics* in your online course.

The table below shows a sampling of commonly used data models and their descriptions.

Data Model	Description	Viewable by Payees?
Transactions	All transactions for which SAP Commissions will evaluate and calculate potential incentive payments.	No
Credited Transactions	Includes all of the credits that are generated for the end-user along with the related transaction and order-specific details	Yes
Uncredited Transactions	Displays transactions that have not yet been credited and have not contributed towards any payments for a given period.	No
Payee Transactions	Displays transactions by payee based on assigned credits	Yes
Credits	Contains the results of the crediting stage, and for each payee, shows whether they got credit and how much credit they received.	Yes
Incentives	Includes the amount of incentive earnings for each payee, quota values and rates for each of the items being measured.	Yes
Commissions	Displays commissions whose incentives are calculated based on credits rather than measurements.	Yes
Measurements	Displays the values that represents achievement for each payee.	Yes
Deposits	Displays the total payout earned for each payee in a period, including Earning Groups and Earning Codes.	Yes
Payment Summary	Displays payee payment information, including earnings from prior periods.	Yes
Balances	Displays payee balance information for the period.	Yes
Model Credits	Displays credits for a period created using the Modeling feature.	No
Model Measurements	Displays measurements for a period created using the Modeling feature.	No

Model Incentives	Displays incentive earnings for a period created using the Modeling feature.	No
Model Deposits	Displays deposits for a period created using the Modeling feature.	No
Disputes	Displays disputes submitted by payees. Contains volume of cases, categorization by dispute status, dispute type, assignment, etc.	No
Plan Documents	Displays the status of distributed plan documents.	No
Pipeline Metrics	Enables Admins to see different types of pipeline runs (Compensate and Pay, XML Import, etc.) that have been executed in the system.	No

Data Models Overview in Embedded Analytics for SAP Commissions



Video

For more information on this topic please view the video in the lesson *Creating Stories with Embedded Analytics* in your online course.

To learn more about data models, watch the video [Data Models Overview in Embedded Analytics for SAP Commissions](#).

Create a Custom Data Model

In addition to the stock data models, embedded analytics allows you to create custom data models. This is done by allowing an administrator to upload custom code on a new landing page.

When a user logs in to embedded analytics, the landing page is determined by the type of user. Administrators are taken to the Embedded Analytics Configuration page, while authors and viewers are taken to the main SAP Analytics Cloud page.



The screenshot shows the SAP Embedded Analytics Configuration interface. At the top, there's a header bar with the SAP logo and a 'View Stories' button. Below it, a dark navigation bar contains the text 'Custom Model'. Underneath, there are two tabs: 'File Manager' (which is selected) and 'Data Model Permissions'. On the left, there's a sidebar with a tree view showing nodes like 'All_cred_dep_inc_mea.txt' and 'All_cred_dep_inc_mea.mea'. The main area displays the contents of the uploaded file:

```
{
  "EXT": {
    "kind": "context",
    "@Common.Label": "Custom"
  },
  "EXT.CSA_MEASUREMENTFACT_SVW_EXT": {
    "kind": "context",
    "@Common.Label": "Custom Measurements omega",
    "@Analytics.query": false,
    "@Analytics.dataCategory": {
      "id": "CUBE"
    },
    "elements": {
      "NAME": {
        "@Common.Label": "Custom Measurement",
        "type": "cds.String",
        "@Analytics.Dimension": true
      }
    }
  },
  "PLANNAME": {
    "@Common.Label": "Plan Name",
    "type": "cds.String",
    "@Analytics.Dimension": true,
    "@UI.Hidden": true
  }
}
```

At the bottom right of the main area, there are 'Validate & Upload' and 'Cancel' buttons. A message box at the top right says 'File successfully uploaded.'



Figure 92: Custom Data Model File Manager

The Embedded Analytics Configuration page has two tabs: File Manager and Data Model Permissions. On the File Manager tab, the administrator can create or update a CSN file that contains the metadata for all the custom models available in the environment. The easiest way to do this is to download the existing CSN file and make the necessary edits. Documentation on creating and editing the CSN file can be found in the [online help](#).

Once the CSN file has been created or edited, the Data Model Permissions tab allows the administrator to determine which user types can access the data model. Only administrators and authors can be granted access to data models as viewers can't create stories.



Name	Created	Role Permissions
Custom Deposits omega	02/07/2023	Author
Custom Incentives omega	02/07/2023	Administrator
Custom Measurements omega	02/05/2023	Author, Administrator
Custom Credits omega		

Figure 93: Custom Data Model Permissions

Create a Team in Embedded Analytics

A Team in embedded analytics is a group of users assigned for a particular purpose. Teams are useful when you have a group, such as a sales team, with whom you'd like to share stories or folders regularly without having to select the members one at a time. Only Administrators or Authors can create Teams.

A Team can have an associated folder. This is a very easy way to share contents of a folder to the same team regularly. If you create a folder in a Team, the folder can only be deleted by deleting the Team.



Figure 94: Team

To create a Team:

1. Select *Teams* from the *Files* menu
1. Select the *Create* icon to open the *Create Team* dialog box.

2. Add team members and select *Create*.



Video: Defining Teams and Story Permissions in Embedded Analytics

For more information on *Defining Teams and Story Permissions in Embedded Analytics*, please view the video in the lesson *Creating Stories with Embedded Analytics* in your online course.

To learn more about defining Teams, watch the video on [Defining Teams and Story Permissions in Embedded Analytics](#) to get more information.



LESSON SUMMARY

You should now be able to:

- Create a story in Embedded Analytics
- Identify the data models available with Embedded Analytics
- Create a custom data model
- Create a team in Embedded Analytics

Scheduling and Publishing Stories



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Schedule a publication

Schedule and Publish Stories

Embedded analytics allows the administrator to schedule the publication of stories to selected users or teams. When a story is published, each user gets an e-mail with the story as an attachment. You can set a schedule to share a copy of a story with any number of internal users and up to three external users.

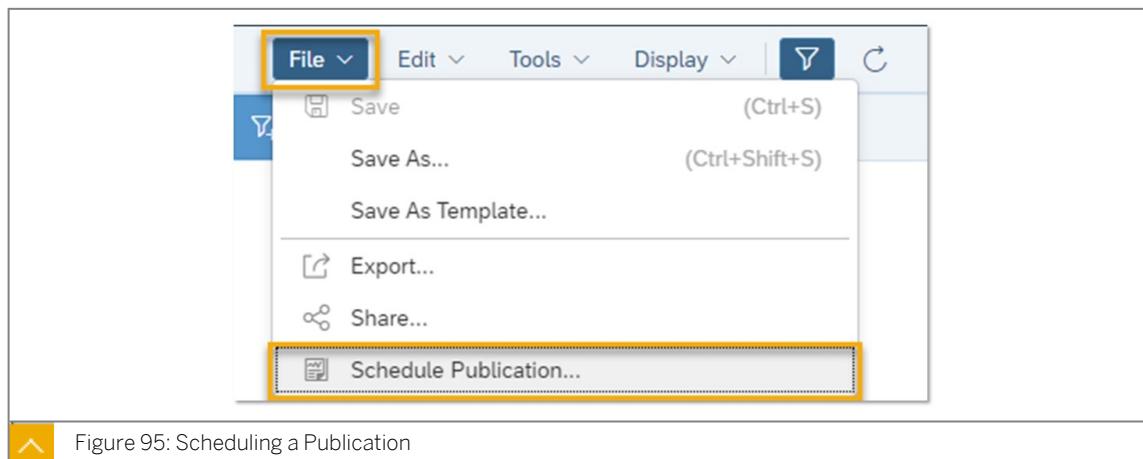


Figure 95: Scheduling a Publication

Enabling Scheduling and Publication

To enable scheduling and publishing, the transformation mapping file needs to be updated. The transformation mapping file is a .json file that can be downloaded from the embedded analytics online help. The file is then uploaded to the Identity Provisioning System. Once the update is done, the Schedule Publication item will appear on the File menu as shown in the preceding figure.

Scheduling a Publication

Selecting the Schedule Publication menu item opens the Share Story dialog box.

The first choice is to use *Broadcast* or *Burst* mode. These modes control the data that the receiving user can view. Broadcast mode allows the user to view any data the sender is authorized to view, while Burst mode allows the user to view data they are authorized to view.

The publication can be scheduled to run once, or on a recurring schedule.

When a story is published, the target audience receives an e-mail with story attached as a PDF or a PowerPoint. Here, you can also enter the email subject and body text.



Share Story
Schedule and share your story.

Choose Mode

Broadcast Share content using your data authorization

Burst Share content using the recipient's data authorization

*Event Name:
2022 Transaction Details

Start Date:
Jan 22, 2023, 1:00

+ Add Recurrence

File Type:
PDF

Email Subject: *
2022 Sales Transaction Details

Email Message:

B I U E Andal... 8 pt A ... Team,
Attached are the transaction details for the past fiscal year. Great job!

Figure 96: Sharing a Story

The lower part of the dialog box contains distribution options. In this section, you can share different views of the story with different sets of recipients. For example, you may want the Finance team to see the story with a table, and the Sales team to see the table with a chart.



▼ Distribution

You can share additional views of the story with the same or new set of recipients.

View 1

Internal Users:
TEAM: SAP_SPM (SPM users)

External Users:
Enter Email separated by comma

Story View:
Transaction Test

Edit Prompts Change Story Filter

File Name:
2022 Transaction Report

File Settings

+ Add Another View

Your credentials will be saved securely and used for exporting the story during the scheduled runtime.

Figure 97: Scheduling a Publication

Simulation: Schedule a Publication in Embedded Analytics



Simulation

For more information on this topic please view the simulation in the lesson *Scheduling and Publishing Stories* in your online course.

Best Practices When Using Embedded Analytics for SAP Commissions

- Use Generic Attributes in SAP Commissions to add detail to stories
- Use the *For Reporting* field in Commissions rules to create user friendly output names for analytics users
- Remember that embedded analytics is not a data extraction tool. It has an export limit of three million cells, which limits the amount of data you can extract.



LESSON SUMMARY

You should now be able to:

- Schedule a publication

Learning Assessment

1. You wish to share data about overall sales compensation with your company's executives. Which tool in SAP Commissions should you use?

Choose the correct answer.

- A Embedded analytics
- B Dashboards
- C Crystal Reports
- D Web Intelligence

2. Which of the following steps are part of the process of creating a custom data model?

Choose the correct answers.

- A Upload the CSN file in File Manager
- B Set data model permissions
- C Enter a support request to deploy the new data model.
- D Create a custom table in WebIDE

3. One of your users needs to be able to create and share stories in embedded analytics. Which user type should they have?

Choose the correct answer.

- A Administrator
- B Author
- C Viewer
- D Authenticated user

4. Which of the following types of objects can you add to a story canvas? (3 correct answers)

Choose the correct answers.

- A Rules
- B Images
- C Charts
- D Tables
- E Transactions

5. You would like to share a story with several members of your organization. Which is the most efficient way to do this?

Choose the correct answer.

- A Create a team and assign users as members.
- B Create a story and share it with the other users.
- C Create a shared folder.
- D Add the other users as administrators.

6. When scheduling a publication, which option should you select to allow recipients to view all data to which you have access?

Choose the correct answer.

- A Broadcast Mode
- B Burst Mode
- C Transformation Mapping
- D Teams

Lesson 1

Business Units

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UNIT OBJECTIVES

- Identify Business Unit Object Relationships

Business Units



LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify Business Unit Object Relationships

Business Unit Object Relationships

To ensure data integrity, Business Unit assignments must meet certain requirements. The following table shows a list of Business Unit object relationships.

Referred: Objects that contain the object type. You can create or assign object types from these objects.

Referring: When the object type contains the objects, you can create or assign referring objects from the object type.

Object Type	Referred by Objects	Referring to Objects
Participant	Position	None
Title	Position	Plan
Position	Positions (subordinates)	Participant, Title, Plan, Position Group, Positions (manager)
Position Group	Position	None
Plan	Position Title	Rule
Rule	Plan	Formula, Variable, Territory, Fixed Value, Quota, Rate Table, Lookup Table
Formula	Rule, Formula, Rate Table, Lookup Table	Formula, Variable, Fixed Value, Quota, Rate Table, Lookup Table
Variable	Rule, Formula, Rate Table, Fixed Value, Lookup Table, Territory	Rate Table, Fixed Value, Territory
Territory	Rule	Category, Classifier
Fixed Value	Rule, Formula, Lookup Table, Rate Table, Fixed Value Variable	
Quota	Rule, Formula, Lookup Table, Rate Table	
Rate Table	Rule, Formula, Lookup Table, Rate Table Variable	Formula, Lookup Table, Quota Variable, Fixed Value

Lookup Table	Rule, Formula, Lookup Table, Rate Table	Category, Classifier, Category Tree, Formula, Lookup Table, Fixed Value
Category Hierarchy	Category, Lookup Table	None
Category	Territory, Lookup Table	Classifier (indirectly through the relationship), Category Hierarchy
Classifier	Territory, Lookup Table, Category	None

Items Controllable by Business Units

The following table lists Business Unit security constraints by type of object.

Workspace/Item	Controllable by Business Units
Participants	Can be assigned to one or more Business Units
Titles	Can be assigned to one or more Business Units
Positions	Can be assigned to a single Business Unit
Position groups	Can be assigned to a single Business Unit.
Relationships	Not directly assignable to a Business Unit. Relationships are controlled indirectly by the position's Business Unit assignment.
Roll Types	Not directly assignable to a Business Unit.
Compensation Elements	Can be assigned to one or more Business Units
Categories	Can be assigned to one or more Business Units Subcategories can be assigned to only those Business Units to which the parent category is assigned (or a subset thereof).
Classifiers	Can be assigned to one or more Business Units
Orders, Transactions	Can be assigned to a single Business Unit
Results Data (Credits, Measurements, etc.)	Assigned to the Business Unit to which the position is assigned. If you change a position's Business Unit assignment, when you next run the calculation the results data follows the position. If you need to re-run the calculation, you must do so for all periods in which the Business Unit assignment change is effective.

Workspace/Item	Controllable by Business Units
Users	Can be assigned Read and/or Full access to any combination of Business Units. Users can set a default Business Unit.
Roles	Not directly assignable to a Business Unit.
Global Values	Not directly assignable to a Business Unit.

Business Unit General Rules

The following list contains general rules about assigning or changing Business Units for objects that are in hierarchies (categories, relationships):

A set of Business Units for an object must contain the set of Business Units for its referring objects. You cannot remove a Business Unit if it violates this condition.

For example, if you have a category associated with BU1 and BU2, its category hierarchy must also have BU1 and BU2. You cannot remove the Business Unit from the hierarchy. If you later remove BU1 from the category, you can then remove it from the hierarchy.

Create the object type with the Business Unit that has the referred object.

For example, you cannot assign a Product Sales Specialist to the *BU_Europe* Business Unit unless his or her manager is also assigned to at least the *BU_Europe* Business Unit as well.

You cannot change a category's Business Unit assignment in a way that separates it from the categories or classifiers beneath it.

For example, if the Bike Products subcategory is assigned to the Europe and Australia Business Units, and all items beneath that subcategory are also assigned to the Europe and Australia Business Units, you cannot change Bike Products to be assigned only to the North America Business Unit.

If you assign a Business Unit to a category during the creation of a category hierarchy, the Business Unit of the category persists in its subcategories as they are created.

Changes to Business Units cascade only a single level for most objects but includes the category hierarchy. For example, if you change the Business Unit for a subcategory, the change cascades to the parent category and the category hierarchy.

If you change the Business Unit assignment of an item, changes are not propagated to its referred items.

If you change the Business Unit assignment for a position, Commissions updates the position's associated results data during the next calculation run. Results data that is manual, imported, or historical continues to have the old Business Unit assignment.



Note:

To change the Business Unit assignment of multiple objects, select them in the summary view and change the Business Unit in the detail view.

Touchless Deployment

Touchless Deployment is a self-service capability that fully empowers customers to develop and deploy custom code in the EXT Schema.

Without *Touchless Deployment*, your developers could create custom code and other database changes to the extended (EXT) schema in a development environment, but would have to submit a service ticket to publish the changes to a production environment. *Touchless Deployment* allows you to deploy database changes into the EXT schema in the production and non-production environments, enabling them to continuously test and deploy database schema changes in their tenant. This option makes database refactoring much simpler, and there is no need to create service tickets when you need to push custom code to your production instance.

- Users can easily develop and deploy tables, sequences, procedures, views, and more.
- The deployment starts immediately, as long as no pipelines are running.
- All deployment details and errors are accessible to enable troubleshooting in case the deployment fails.

Touchless Deployment service for EXT schema is based on an open-source tool called *Liquibase*. *Liquibase* is an open-source tool that can be used for database refactoring.

Liquibase lists all the changes made to the database in a sequential manner. The changes are recorded in a changelog in the order in which they need to be deployed. *Liquibase* then uses the changelog to inspect and execute the updates that are not yet applied to the database. Customers need to upload the changelog and SPM will use *Liquibase* to execute the changes.

Enabling Touchless Deployment

To enable the *Touchless Deployment* feature, create a service request. Support will enable the *Touchless Deployment* REST Service on your tenant and notify you.

The *Touchless Deployment* permission is added to a role in the Security workspace. The Commissions user who deploys the database changes would then be granted access to the role. Generally this would be a system role used only for touchless deployment; in the example below, we are using a user called *U_TouchlessDeployment* and a role called *R_TouchlessDeployment*.

To configure permissions for *Touchless Deployment*:

1. In Manage Setup → Security → Roles, create a new role called *R_TouchlessDeployment*.
2. Open the Permissions tab.
3. Select *Administration*.
4. Under *Touchless Deployment*, check the box under the *Update* column and save the role.

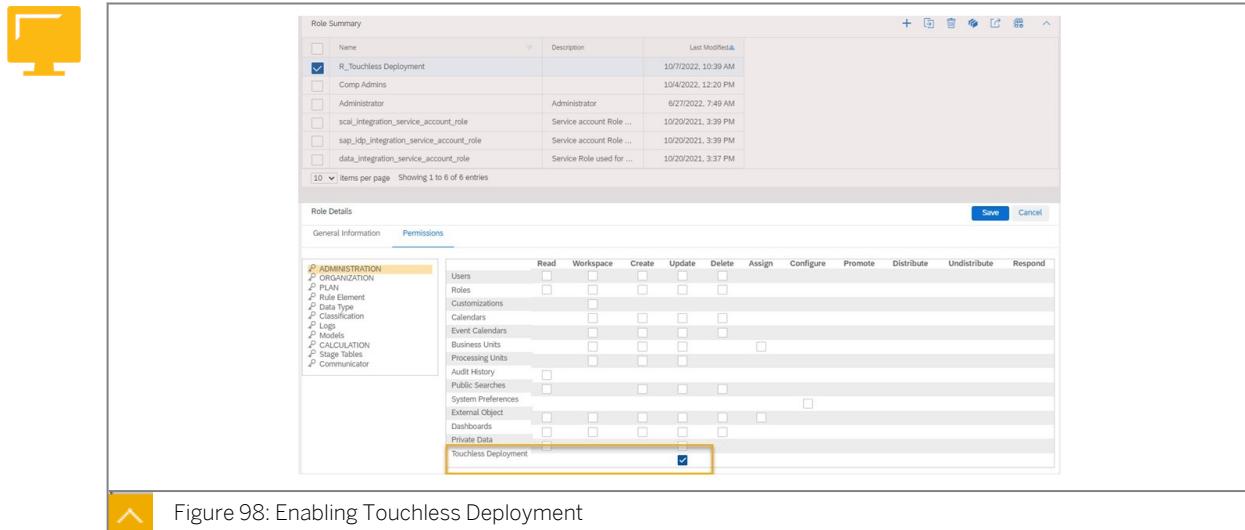


Figure 98: Enabling Touchless Deployment

When enabling *Touchless Deployment* in your environment, keep in mind the following points:

- *Touchless Deployment* is available only for the EXT Schema and not for TCMP Schema. TCMP Schema related changes require a support ticket.
- Ensure your syntax matches to the standard Oracle and HANA SQL scripts in your artifact.
- Ensure you rollback the right deployed status ID.
- Currently, *Touchless Deployment* is not Applicable for HDI Containers used in your SDI Project.
- Refer to the *Liquibase* Documentation to understand the Syntax <https://docs.liquibase.com/>

Product Glossary

Adapter	SDI component which allows connectivity to external sources.
Pipeline	Pipeline is a compensation computation process initiated from the Pipeline workspace in the Job Queue view or from the command-line utility. The pipeline produces compensation and pay results for payees assigned to variable compensation plans. See Commissions online help for more details.
Commissions Workspace	Designated area in Commissions where related compensation objects are grouped together so that a user can perform related tasks from the same place.
Adjustment	A change to the amount of a transaction, credit, or deposit.

Administration Data	Commissions data set up during implementation to identify and group data. Includes users, groups, business units, calendars, message log, roles, periods, and data types (credit types, earning codes, earning groups, event types, and reason codes). Administration data is tracked by audit history only, and is not versioned.
Aggregate credit incentive rule	A general incentive rule used to calculate incentives by comparing a specified measurement value, usually an aggregation of credited transactions, to a rate or rate table to calculate total incentive output earned by a participant.
Allocate stage	Calculation stage in which credits and primary measurements are calculated and allocated to participants. The input to the stage is classified transactions from the Classify stage; the output is credits and primary measurements that are allocated to position assignments.
Applied balance	The status of a balance is set to “applied” in the Post stage of the calculation, after the balance is posted. Balances marked “applied” are not processed during calculation runs.
Assign Permission	Permission that allows a user to assign compensation elements to variables in a plan.
Associated duplicate	An order credit that is the same as another credit for all attributes except period. Transaction credits do not have associated duplicates.
Attainment level	Level of sales performance for an individual compared to a quota. Often used to determine the applicable rate from a rate table for an incentive.
Attainment period	The period type for which attainment is measured for an incentive rule calculation. For example, an incentive rule might determine an attainment level using quarter-to-date performance.
Audit history	List of all of the changes that have been made to an object over time.
Audit log	A set of additions, modifications, and deletions to objects in the database.

Balance	Represents the net effect of a payment change calculated for a finalized period. Once a period is finalized, new payments cannot be calculated for that period. For finalized periods, any payment difference is stored as a positive or negative balance.
Base unit type	Specifies the predefined unit type. Commissions includes the following base unit types: percent, integer, quantity, and currency.
Batch	A group of similar objects produced, processed, or gathered together and treated as a single unit. For example, a batch can be a data set that is processed during a calculation run. You specify the batch name when importing data into staging tables.
Bonus	Generally, a kind of incentive award that is awarded when a specified performance goal is met, such as attainment of a quota.
Bonus rule	A type of incentive rule used to calculate incentive awards. A bonus rule is typically a formula-driven incentive rule that uses a formula rather than a measurement to determine rule output. For example, you can create a formula for an incentive rule that awards a one-time payout of a 10K bonus after the payee's quarterly quota is attained.
Boolean	A unit type that restricts the range of allowed values to 0 or 1 (true or false).
Business node	An internal object that is a unique combination of a position, a payee, and a plan. Business nodes do not correspond to a table in the database.
Business unit	A data security feature that can be used to provide another layer of data access security by segregating compensation data for different parts of the corporate structure.
Calendar	An object that defines the frequency by which compensation payments can be made, and generally matches the corporate fiscal calendar.
Category	A component of the category hierarchy used to filter sales transactions into meaningful bundles for any commissioned business event. Categories and classifiers provide a flexible and generic way to incorporate knowledge of any specific business entities into the compensation process.

Category hierarchy	The tree structure that organized categories, subcategories, and classifiers. A category hierarchy typically includes a classifier type and a root category with associated classification rule, one or more optional subcategories, and one or more classifiers with associated definitions.
Classification data	Categories and classifiers. Tracked by both audit history and effective time.
Classification rule	A user-defined expression that defines what kind of classifiers in the category hierarchy are to be matched against which fields on the transaction. You create classification rules when you create the category hierarchies.
Classifier	An object that has a unique identifier and a set of fields defined by the associated classifier type. For example, in the Product category, each classifier represents a unique product with a unique identification number. Classifiers are used by classification rules to match fields on a transaction, and by compensation rules to filter input to the rule.
Classifier assignment	The relationship created by assigning a classifier to a category for a specified period of time. A classifier can exist in multiple category hierarchies, but it can be assigned only once in each hierarchy.
Classifier type	A label that defines the type of classifier being organized in a category hierarchy. Predefined classifier types include customer, postal code, and product. New classifier types can also be defined by the administrator.
Classify stage	Calculation stage that classifies valid transactions. Input to the stage is valid transactions, output is classified valid transactions and associated classification records. Consists of one step, Classify.
Commission	Generally, a type of incentive award based on credited transactions or other measurement value and usually proportional to the value of the measurement. A commission is also the term for an object created by a per-credit commission rules. You can view Commission objects in the Commissions workspace.
Commissions Stage Tables	

Commit size	The number of records to commit to the database at one time. This depends on the size of your rollback segments.
Compensate and Pay sequence	Sequence of calculation stages that includes the Classify, Allocate, Reward, and Pay stages.
Compensation element	Reusable objects that you can build into compensation rules or other calculations to return a value or set of values. Includes fixed values, formulas, lookup tables, rate tables, territories, and variables. Compensation elements are tracked by both audit history and effective time.
Compensation plan	<p>Set of compensation rules used by the calculation to calculate compensation and payments.</p> <p>A compensation plan generally consists of at least one of each type of compensation plan rule: credit, measurement, incentive, and deposit.</p>
Compensation rule	Combination of input, condition criteria, and an output result. You use compensation plan rules to specify how Commissions calculates credits, measurements, incentives, and deposit amounts for participants who are assigned to the plan.
Create default data	A calculation process that runs automatically to initialize measurements and incentives during a calculation run.
Credit	Allocation to a participant of the value of a sales transaction, a part of an order, or an entire order.
Credit date	Specifies when a credit rule for a participant can be processed by the calculation. If a transaction's compensation date is outside of the participant's credit dates, the credit is not created during the calculation run.
Credit rule	Compensation plan rule used by the calculation to calculate and allocate credits to participants.
Credit type	Label that defines the source of data from which a credit was created. Credit types are used in credit rules so that credits of different types can be calculated separately.

CSV file	A plain text file with comma separated values. In SAP Commissions, you can export data from a workspace summary view into a CSV plain text file. You can export any record that is listed in the summary view
Current version	The version displayed for effective dated objects based on the Default Calendar date and or period.
Data type	The user-defined types of data (credit types, earning groups, earning codes, event types, reason codes, and fixed value types).
DB Explorer	Is a component, which allows access to HANA database objects.
Default currency	The default currency set in SAP Commissions for payment processing.
Deferred reset	A calculation reset stage in which Commissions does not physically delete results data from the database. Instead, the results data is marked as invalid, and can be removed at a later time.
Deposit	Amount of compensation calculated for a participant for the period in which the calculation was run. A deposit is usually associated with a specific earning group.
Deposit rule	One of the basic rule types processed by the calculation that make up a variable compensation plan. Deposit rules are processed during the Reward stage to calculate how much of each kind of incentive compensation a participant has earned in a specified period, and when the compensation can be paid.
Direct credit	Credit allocated to a participant based directly on a sales transaction, as opposed to allocation based on another credit.
Duplicate credit	Named credit that is derived from the same source transaction or order as an existing credit. When you create a credit rule, you specify whether duplicate credits are allowed.
Earning code	Label used in deposit rules to differentiate kinds of deposits. For example, you can use earning codes to differentiate types of bonuses within the Bonus earning group. Earning codes are not used during calculation processing; they are passed to external systems, such as payroll systems.

Earning group	A label used to group similar types of deposits into a single payment. Payments of the same earning group will aggregate or offset each other.
Earning	Amount of money calculated by the calculation as potential payment, less any amounts previously deposited and paid (or created as a balance) during the specified period.
Effective date	The start and end dates for a version of an object. Tracks which version of an object and related objects are active. Objects tracked by effective dates are reference data, including participants, positions, titles, relationships, plans, rules, formulas, variables, rate tables, territories, lookup tables, and fixed values.
End dating	Involves changing the effective end date of the last version of an object to a specific date. This should be done when an object is no longer active, but has associated calculation results and cannot be deleted.
Event type	A label on the transaction that describes the type of business event represented by the transaction. For example, you can specify invoice, billing, and shipping as the event type that triggers the processing of a sales transaction.
Export	SAP Commissions exports payments by saving them to an output file for use in an external payroll system. Export occurs in both the Pay stage and Post stage. You can also import and export compensation rules and rule elements from the work-spaces.
EXT Schema	A temporary schema in the HANA database that facilitates data validation, transformation, aggregation, and cleaning for large volumes of data. Customers are allowed to create custom tables and stored procedures in the EXT Schema, but not the TCMP Schema.
Extended attribute	Attributes provided for objects when additional attributes are required in addition to the generic attributes. Extended attributes can be renamed, and are displayed on the object.

External credit allocation	The process by which a transaction includes data that specifies to which position, participant, or title it should be allocated. This process is external to the Allocate stage, which normally performs the allocation of credits to position assignments.
Filter	To compare data to user-specified criteria to reject any data that does not meet the filter criteria.
Finalized period	Period that is closed to new calculation and posting of payments. A change to a finalized period is reported as a balance.
Finalize stage	Calculation stage in which payments for a period are closed. You can finalize a period for just a position group, in which case no more payments can be generated for that group but payments can still be generated for other participants. The Finalize stage also converts negative incremental deposits to posted negative balances, unless Commissions is configured not to make negative payments.
Fixed value	A numerical quantity used to represent an amount. Used to store static numeric values for use in different rules. You can specify fixed values to apply only to a specified period. You can use fixed values for a number of purposes, including quotas, target bonus amounts, commission rates, or Boolean (true/false) information.
Fixed value type	The optional, user-defined attribute that can be assigned to a fixed value. Fixed value types are used to organize fixed values into similar groupings, such as quotas and commission rates.
Flat File	Flat file allows you to specify data attributes, such as columns and data types table by table, and stores the data in plain text format.
Flow Graph	A graphical user interface to develop data integration mapping and transformations.
Formula	Named, reusable object used to store an expression, such as a mathematical calculation. Used most often in conditions and action statements within a compensation plan rule, but also used in rate tables and lookup tables.

Full mode	Default mode for the calculation. Designates calculation of compensation for all positions and transactions in a specified period.
Function	Predefined, reusable operation used in a compensation rule. Functions are selected in the legal moves list in the Rule Editor or Formula Editor.
Generic attribute	A label used in the initial name of a custom attribute. A set number of generic attributes are provided for strings, integers, dates, and Booleans. The Administrator can customize these attributes. If a generic attribute is not active, it does not display in the workspace.
HANA Database	SAP HANA database, which is used by Commissions for data storage and processing.
Held	Flag set on a credit or deposit that prohibits the object from being processed until a specified release date.
Hire date	Date a participant begins employment at a company or enters into a company's variable compensation system.
Import	To load data from an external system into a staging area of the repository. You can run validation checks on the data in the staging area before transferring the data to the production tables and running the calculation. You can also import and export compensation rules and rule elements from the workspaces.
Incentive	The compensation amount in commissions or bonuses that is calculated by incentive rules during the incentive step of the calculation.
Incentive rule	Compensation plan used to calculate the incentive compensation (bonuses and commissions) for each participant assigned to the plan by comparing measurements or credits to quotas and rates. Incentive rules are processed during the Reward stage of the calculation.
Incremental deposit	Deposit of earnings based on new or modified transactions and credits.

Incremental Mode	Calculation processing mode that designates processing of only those transactions and credit that are new or changed (flagged as runnable) since the last calculation run.
Incremental order credit	An order credit that is the difference between the current, candidate order credit and the sum of previous order credits. The credit generated from an order credit rule that specifies the creation of incremental credits when duplicate credits occur.
Indirect credit	See rolled credit.
Inline object	An object created during the creation or modification of another object. For example, you can create new titles from the Positions workspace, rules from the Plans workspace, and formulas from the rules workspace.
Integer	The base unit type or one of the pre-defined unit types that stores whole number values (positive, negative, or zero values).
Leaf-level	Lowest level of a tree structure hierarchy. In relation to category hierarchies, the leaf-level is the classifier. In relation to periods, the leaf level is the smallest period unit in a fiscal year, usually a month or two weeks.
Legal moves	List of the literals, functions, data fields, and references that are valid for a compensation rule. You select from the legal moves list when creating the input, conditions, and output of compensation plan rules and formulas in the rule editor.
Literal	Legal move that specifies a static type of data. Literals include date, string, Boolean, duplicate behavior, and unit type.
Locale	Set of parameters that defines a user's language, country, and any special preferences defined for the user interface. A typical locale identifier consists of a language identifier and a region identifier. Locale sets the display format for date and time as well as currency.
Log file	A plain text file that contains messages generated during calculation runs.

Lookup table	A multi-dimensional table that is a compensation element. Lookup tables are created by the user to store a set of values for use in rules and formulas.
Major period type	The larger calendar unit that is demarcated in the calendar bar of effective version dialogs. The major period type is displayed as a long tic mark, the minor period type as a short tic mark. You can set the major and minor period types in the Calendar workspace.
Manual credit, deposit, order, or transaction	Credit, deposit, order, or transaction that is created rather than calculated or imported into SAP Commissions.
Measurement period	Specifies the type of period for which the participant should be paid in an incentive rule. For example, if the incentive rule's measurement period is month, revenue commission rates are applied to the measurements for each month
Measurement rule	Compensation plan rule run by the calculation to calculate measurements for position assignments for a specified period. See primary measurement rule and secondary measurement rule.
Measurement contribution value	The amount a credit contributes to a measurement. If the measurement is a calculated value, the contribution value is different from the credit value. For example, for a measurement that is 125% of a credit that has a value of 100, the contribution value is 125.
Message log	The log file to which errors and other processing information are written when you run the calculation.
Minor period type	The smaller calendar unit that is demarcated in the calendar bar of effective version dialogs. You can set the major and minor period types in the Calendar workspace.
Modification	A change to information on an existing record. Often done on organization data, such as changes to the address of a participant. A modification does not create a new record whereas an adjustment does.
Module	Used at the command line for import calculation operations to specify the type of data to import.

Negative payment	The output from a Pay stage that produces a payment liability, or a payment amount with a negative numeric value.
Object	A data item that the user can view or manipulate. Each kind of object has an associated workspace.
ODATA	Protocol for building and consuming REST APIs.
Offset	Used to refer to a period that is relative to the period being run.
On-demand position processing	Calculation mode configured to enhance performance when processing large volumes of positions by processing positions as needed rather than processing the entire set. On-demand position processing has the following requirements: all transactions are preassigned and all credit rules are written based on preassigned transactions. It is available for full or incremental runs only.
Order credit	A credit that is based on data from specified parts of an order or from the entire order. Contrast with transaction credit.
Order-level function	One of the functions that summarize data applicable to an entire order.
Organization data	Includes the following objects: participants, titles, positions, position groups, and relationships. Organization data is tracked by both effective time and audit dates.
Participant	Person or organization participating in your company's variable compensation program. Also called payee. A participant can be either an internal employee or an external company, such as a dealer.
Target compensation	Total compensation that a participant can receive for a given period if all quotas and conditions are met. Typically, on-target earnings have two components: base salary and target variable compensation (such as incentive compensation, stock option, referral bonus, or a target). Synonyms for on-target earnings include target annual earnings (TAE), total compensation, and target compensation

Payee preassignment	A credit allocation on a transaction that specifies preassignment to a payee, position, or title. Preassigned transactions are processed through the calculation using preassigned credit rules created specifically to process preassigned transactions. These preassigned credit rules evaluate only the subset of positions that are preassigned with any payee/position/title combination while other credit rules evaluate every position loaded per transaction.
Payment	Value of the total deposit to be paid to a participant in the specified period.
Pay stage	<p>Calculation stage in which the following are calculated:</p> <ul style="list-style-type: none"> • For non-finalized periods: payments. • For finalized periods: balance information. <p>Any past positive or negative payments or balances are added to the current period payment to produce a payment summary. Input to this stage is compensation amounts for participants for the period of the calculation run (from the Reward stage). Output is available to the Post stage, and is also written to an output file (see export).</p>
Percent	The base unit type that stores values in terms of parts per hundred.
Period	<p>Specified duration of time over which incentives are calculated and paid.</p> <p>Typically, the leaf-level periods are the 12 months, such as January 2022. Each period has an associated period type.</p>
Period type	Designation that defines the attributes of a kind of period. Common period types include bimonthly, month, quarter, and year.
Per-credit commission rule	<p>A kind of incentive rule used to calculate an incentive by multiplying the value of each credit in a specified measurement by a rate to produce individual commission amounts for each credit. The rate can be based on a fixed value, a constant, the result of a formula, or a rate table.</p> <p>Results data from per-credit incentive rules is accessed in the Commission workspace.</p> <p>Contrast with aggregate credits incentive rule.</p>

Per-position mode	Calculation processing mode that designates calculation of compensation for only the positions that are marked as runnable.
Permission	The level of access to an object or the ability to perform a specified action. For example, a security role can have read permission for participants, but not have create permission for them.
Permission set	Grouping of related data or operations. You can apply permissions to individual objects and processes or to entire permission sets.
Calculation	Process model used to calculate compensation and to import external data into SAP Commissions. The calculation is divided into stages, each stage include one or more conceptual steps.
Plan	Also known as a compensation plan; a collection of rules that specify how to compensate the participants assigned to that plan.
Plan assignment	Association of a compensation plan to a position with an assigned participant.
Plan data	Objects used to create compensation plans, including plans, rules, formulas, and variables. Plan data objects are tracked by both audit history and effective time.
Position	Defines a specific, unique job in an organization. Positions are generally filled by people, but can be used to represent a company or another entity.
Position assignment	The relationship created by assigning a participant to a position for a specified period of time.
Position group	A label assigned to a subset of positions for processing during a calculation run (pay, post, and finalize), for example to process different groups at different times in a period.
Position relationship	An explicit relationship between two positions used for rolling credits and other data. A common type of relationship is the reporting relationship.
Positions incremental mode	Setting for calculation processing that designates calculation for transactions and credits that are flagged runnable, then for positions that are flagged as runnable.

Posted	A payment or balance that is permanently stored in the repository and marked as read-only. A posted item has been sent out of the system and therefore cannot be updated. Payments and balances are marked posted during the Post stage.
Post stage	Calculation stage in which payments and balances from the Pay stage are permanently stored and marked as read-only. Output is available to the Finalize stage, and is also written to an output file. You can have multiple postings in a period (for different position groups) before the period is finalized.
Postexport	The calculation stage that generates the output file containing payments with a status of Posted.
Primary measurement	Named measurement whose value is the aggregate of the credit amounts specified as input to a measurement rule. Each measurement is associated with a specific period.
Primary measurement rule	Compensation rule used by the calculation to calculate an aggregation of credits. Primary measurement rules are processed during the the Allocate stage.
Processing unit	An optional compensation processing feature that enables you to support calculation processing for subsets of data that are partitioned logically within a single Repository. Processing units are defined by the business units assigned to them.
Purge	To systematically and permanently remove old and unneeded data. The term purge is stronger than delete. For example, in SAP Commissions you can run the Purge stage to remove a particular batch of data from the staging tables after the data has been validated and transferred from staging to production tables.
Quantity	A base unit type that stores numeric values, including partial amounts.
Quota	The target sales amount for a position for a specified period. In SAP Commissions, you specify a quota by creating a fixed value and assigning it to the appropriate participant or plan.

Rate table	Table used to calculate incentive compensation for a step commission, where a transaction is paid at different rates across rate thresholds or tiers.
Reason code	Identifier created by a user to identify why an action was taken, for example to identify why a manual credit was created.
Reference data	Data about the organization required by SAP Commissions before compensation can be processed. Generally, reference data objects have effective dates. Reference data objects include participant and position data, categories, plan data (plans and rules), and rule elements.
Related objects	Data objects that refer to one another by way of assignment or inclusion. For example, a participant and a position are related if the participant is assigned to the position, a position and a plan are related if the position is assigned to the plan, and a lookup table is related to a formula if it is included in the formula.
Relationship hierarchy	The roll relationships between positions.
Release date	In reference to a deposit or credit that is held, the release date sets the date the item can be passed into the calculation processing.
Relative period	A period which is a specified amount of time in the past or future. The relative period is determined by the offset setting.
Remove date	The effective end date of a versioned object. The object is removed from active status.
Reporting structure	The structure of reporting relationships between positions. Typically mirrors the company's organization chart.
Rerun positions mode	Calculation processing mode that designates first, the processing of transactions associated with positions flagged as runnable, and second, the positions that are related to the runnable transactions. This list is either the same or larger than the list specified by the user. Applies in Classify, Allocate, and Reward stages.

Reset	Calculation process that deletes, sets to zero, or nullifies data so that calculation stages can populate the database with new data. There is a reset process associated with each stage and runs automatically when the stage is run. You can also run each reset process manually from the command line.
REST API	Conforms to the design principles of the REST, or representational state transfer architectural style.
Results data	Data objects generated by a calculation run.
Reward stage	Calculation stage in which secondary measurements, incentives, and deposits are calculated. Processes secondary measurements, incentives, and deposits. Input to this stage is credits and primary measurements that are allocated to participants; output is the compensation amounts for participants for the period in which the calculation was run.
Role	A an object made up of sets of permissions that can be assigned to users. Provides control and flexibility in managing users and their capabilities.
Rollable credit	Type of credit that can be rolled from one position to another. For example, a sales manager can receive commissions based on a subordinates transaction credits, and these credits can be rolled up the reporting hierarchy. A rollable credit is a rolled credit when it is received by others.
Rolled credit	Credit that was allocated based on another credit. Typically, a participant receives a direct credit for a transaction, and the manager receives a rolled credit based on his roll relationship with the participant who was directly responsible for the transaction. Also known as an indirect credit.
Roll relationship	An association of two positions that is used by the calculation in the process of allocating rolled credits. When you create a roll relationship, you specify a roll type, the source position, and the receiver position. You can also specify dates for which the relationship is in effect.

Roll type	Specifies the type of roll relationship. Can be thought of as a path between positions along which credits can roll between positions of the relationship hierarchy. You can create as many roll types as you need, and give them any name you like. Credits travel along roll relationships of the same type.
Root category	Top node of a category hierarchy.
Rule	A set of statements that tells the system the sequence of actions to perform when defined conditions are met. Compensation plan rules specify how TrueComp Manager calculates credits, measurements, incentives, and deposit amounts for participants who are assigned to the plan.
Runnable	Attribute for data items that designates that the item is available for calculation processing. Typically, items that new or changed are marked as runnable.
Secondary measurement	Named measurement whose value is the aggregate of primary measurements or of calculations based on formulas.
Secondary measurement rule	Compensation plan rule that calculates secondary measurements.
Stage	Processing block in the calculation. Each stage can be run independently of other stages, and includes data reset and background operations.
Stage hook	A feature that allows you to insert custom steps before or after a calculation stage runs. Stage hooks can be Java classes, script files, or stored procedures.
Staging tables	Temporary data storage area where data from external sources is placed during import. You validate data in the staging area before moving it to the production tables.
Step commission	Kind of commission structured such that credit is paid at different rates for different levels, based on a rate table. You can structure step commissions to be calculated on the basis of either individual credits or an aggregate of credits for a measurement.
Straight commission	Incentive rule that uses a single rate or formula to calculate a commission.
String	Series of characters, such as a word.

System preferences	Configuration preferences that control the user, calculation, worker, communication, and import configuration.
TCMP Schema	The term used for the standard HANA database tables that contain records for core Commissions data, such as Participants, Transactions, and Plans. Used in contrast to the EXT Schema.
Territory	Combination of criteria, based on categories and classifiers. Used in credit or primary measurement rules to determine who gets credit for a transaction and in measurement rules to determine how credits are aggregated.
Title	Group of positions related by job function. Titles are used as a way to group similar positions across the organization.
Touchless Deployment	A self-service capability that empowers customers to develop and deploy custom code in the EXT Schema.
Transaction	The original sales (or other event) data, which includes sub-line data (item, who it was sold to, amount, and so on) on an order. Used as the basic unit of data for compensation processing in TrueComp Manager. Transactions are identified by event type, order ID, compensation date, period, and credit type.
Transaction credit	A credit that is based on an individual valid transaction. Contrast with order credit.
Transfer stage	Part of the import process in which data is transferred from the staging area to production tables. You can run the transfer process for different selections of validated data.
Trial	A status that indicates a payment or balance that is temporarily stored until it is posted.
Unit type	Label that identifies the type of unit a numerical value represents. For example, percent, integer, quantity, or currency.
Validate stage	Part of the import process in which the logical integrity of imported data is verified against format requirements.
Variable	A placeholder in rules, formulas, and lookup tables to reference a fixed value, rate table, or territory.

Virtual Table	A HANA component, which allows read and write of data from external sources.
Web IDE	A web browser interface which allows access to HANA database and SDI components.
Worker	Process that is invoked by the controller to evaluate compensation rules and update information in the database. A worker is invoked for a particular purpose for a single step of the calculation.
Workspace	Designated area where related compensation objects are grouped together so that a compensation administrator can perform related tasks from the same place.
Workspace access right	Access right that allows user to view and open the workspace listed in the Control tab. User must also have read access to the associated data items.

Other Resources and Links

- [OpenSAP Microlearning](#) is a collection of free, short videos on a number of topics, organized into playlists. Many of these topics do some nicely technical deep dives as well.
- The SAP Community has a discussion board as well as a blog of technical and business level topics under the SAP Commissions tag.
 - <https://community.sap.com>
 - <https://blogs.sap.com>
- [SAP Online Help](#) is the definitive online help for all SAP Products. Here you'll find documentation on all SAP Commissions topics.

Certification

Want to get certified? SAP has a Certified Application Associate path for SAP Commissions. Find it in the SAP Training Shop at <https://training.sap.com>.



LESSON SUMMARY

You should now be able to:

- Identify Business Unit Object Relationships

Learning Assessment

1. To confirm that you have completed this course, check yes.

Determine whether this statement is true or false.

- True
 False