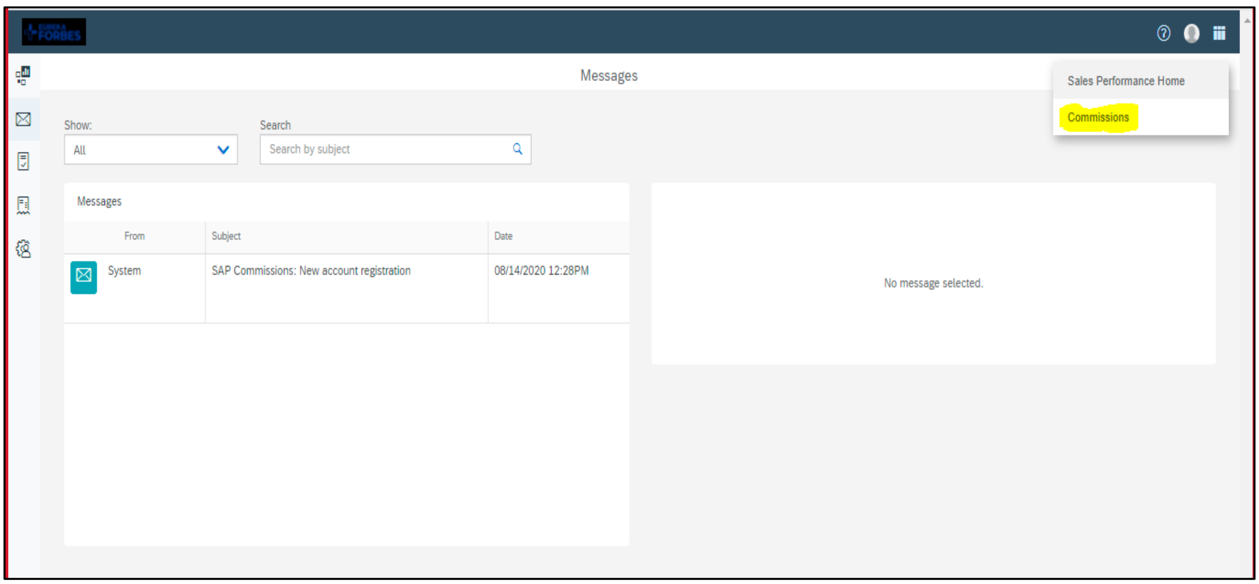
SAP COMMISSION USER MANUAL DOCUMENT

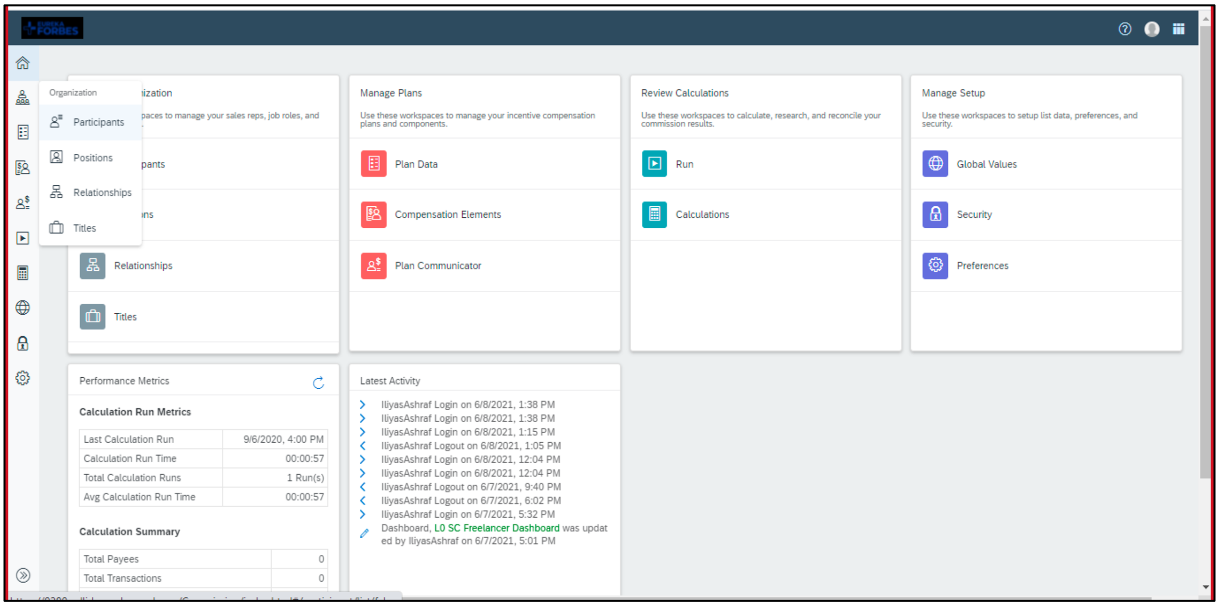
- ## SAP Commission Login Overview

  You can access Commissions from the Sales Portal application. Before you start accessing, contact your Commissions Administrator to set your username, password, security role, access rights, security permission settings, and business unit access. To access Commissions from the Sales Portal application, perform the following steps.

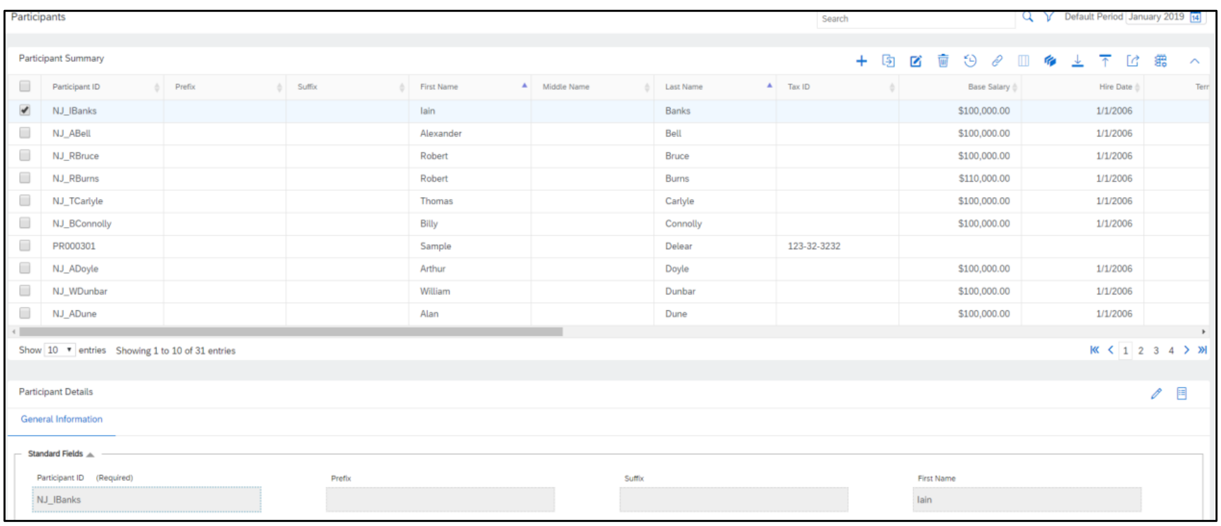
  1. Copy and paste the following URL into your browser: https://0290.callidusondemand.com/SalesPortal/#!/messages
  2. Enter your username and password.
  3. Click *Sign in*. This step takes you to the *Sales Performance Home* page.
  4. Click *Apps.* You can find this icon at the top-right of your window.



- **Participants Workspace**
  Click on the Organization → Participant, as shown in below Screenshot

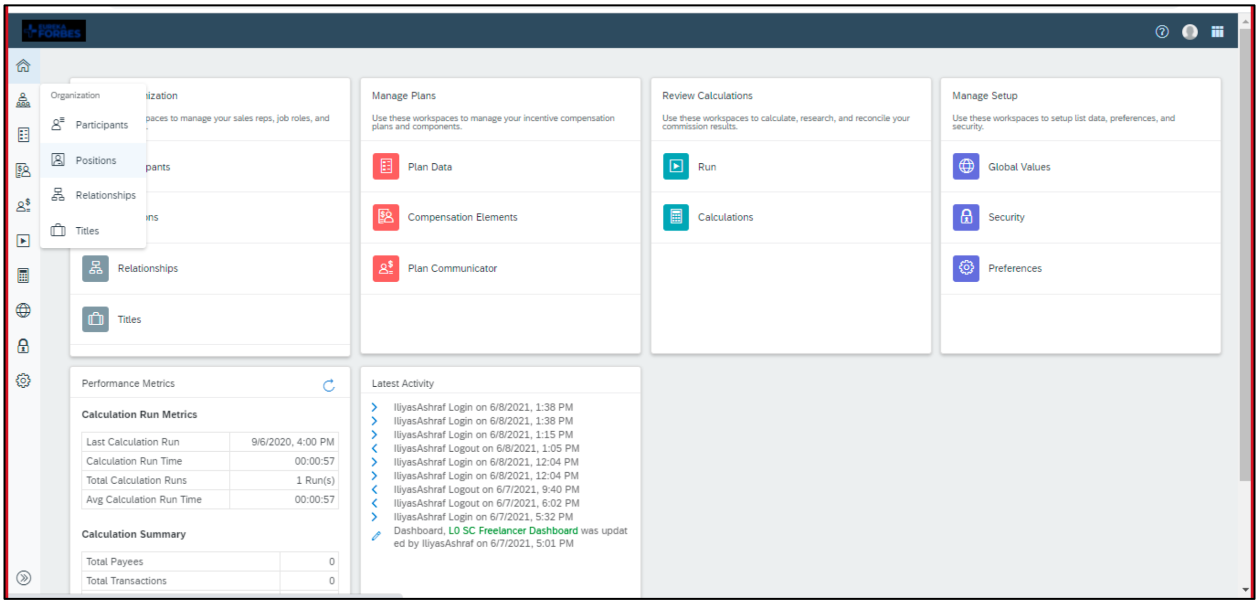


The following figure shows the participants workspace with the *General Information* tab displayed.

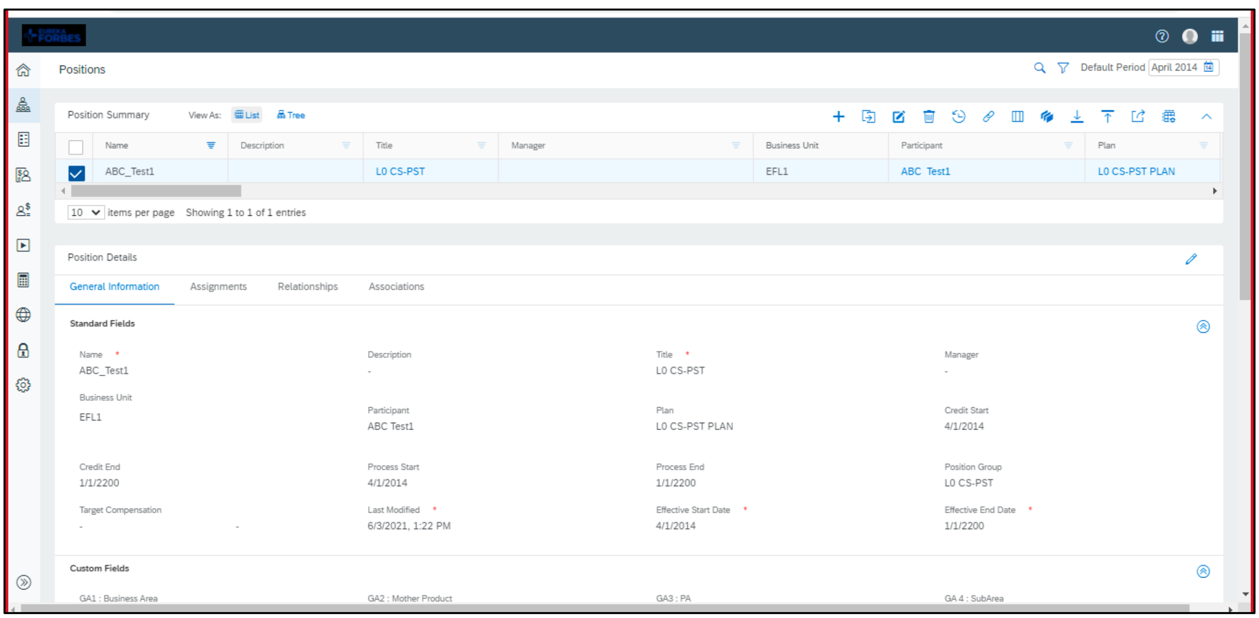


- **Positions Workspace**

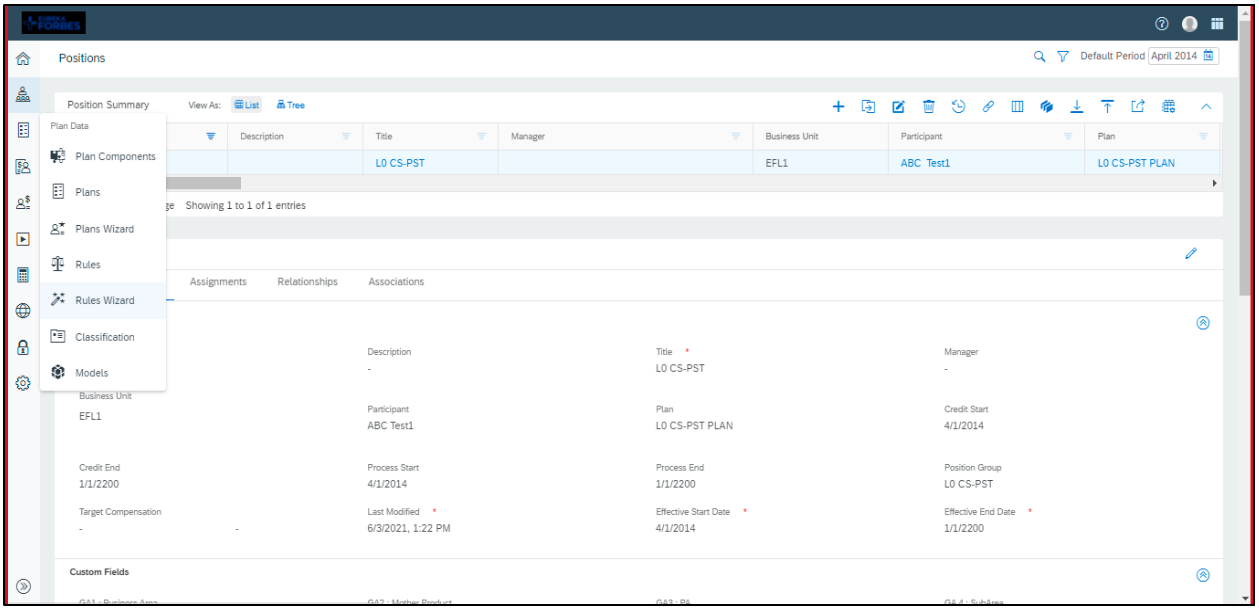
  Click on the Organization → Positions, as shown in below Screenshot



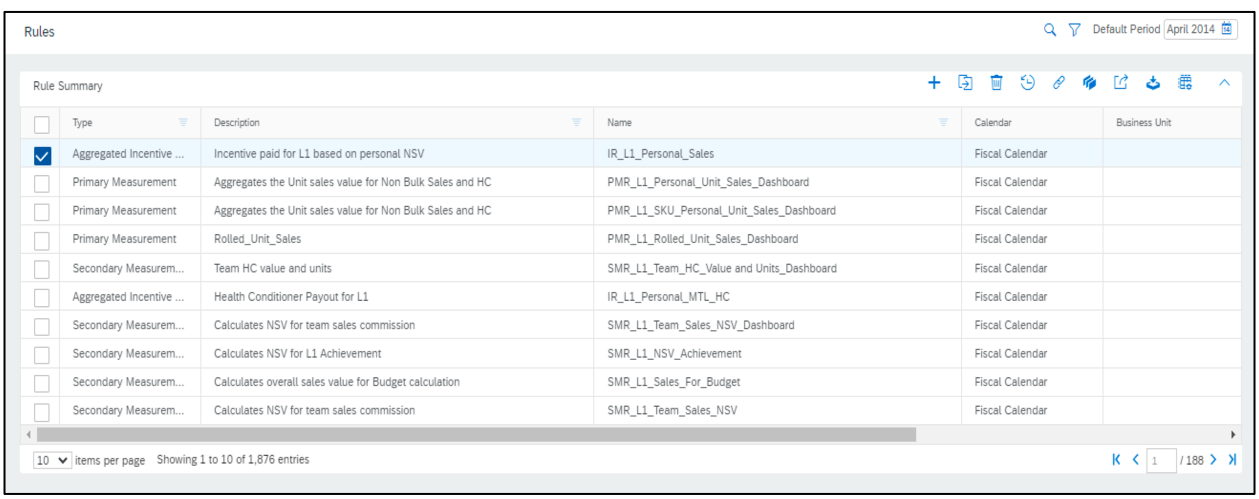
The following figure shows the summary pane of the *Positions* workspace in list view. In the list view individual positions are displayed.



- **Rule Workspace**
  Click on PLAN DATA → Rules Wizard, as shown in below Screenshot

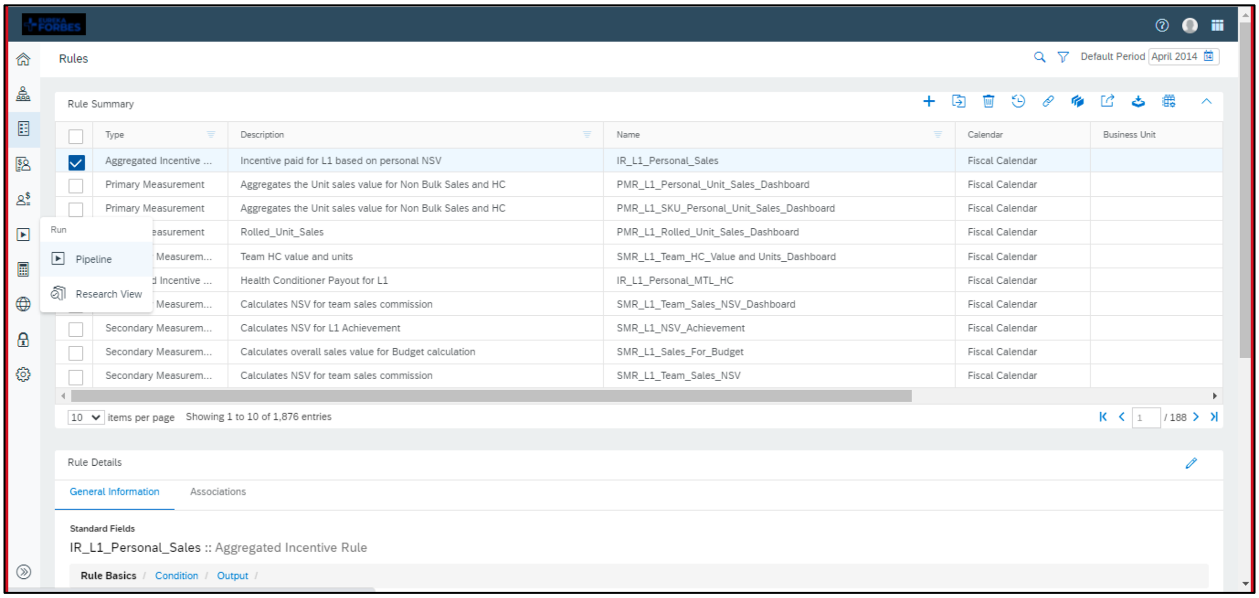


In the *Rules* workspace, you can create, modify, copy, and delete rules. You can also view rules. The Rules workspace contains three tabs: The *Rule* tab and the *Associations* tab. The name and fields in the *Rules* workspace vary depending on the type of rule being created. Each of the four rule types has a distinct editor. All rule editors have similar tabs. The actual display name of the tab depends on the type of compensation rule (credit rule, measurement rule, incentive rule, or deposit rule) selected from the new drop-down list.



- ## Run Calculations

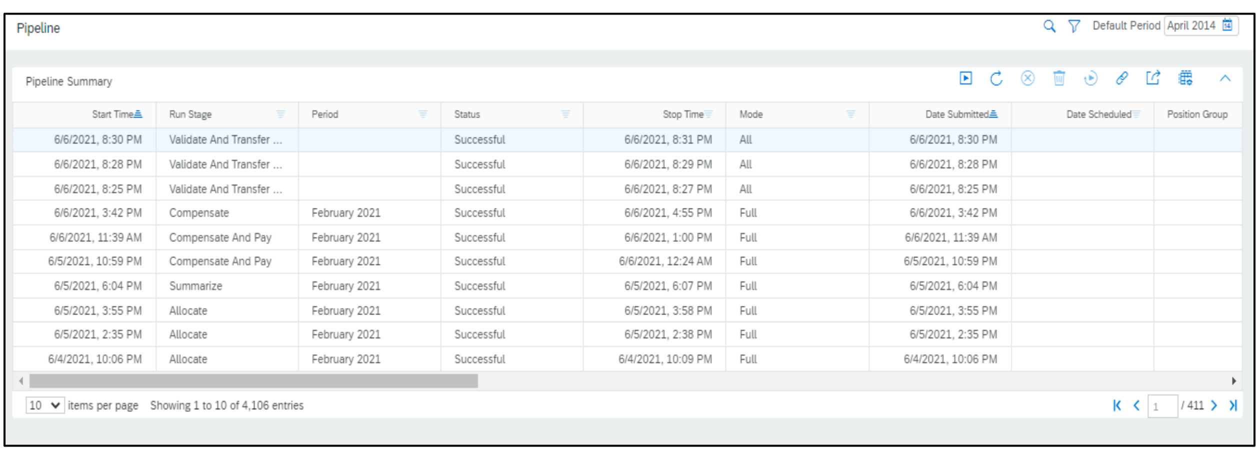
  Click on the Run → Pipeline, as shown in below Screenshot

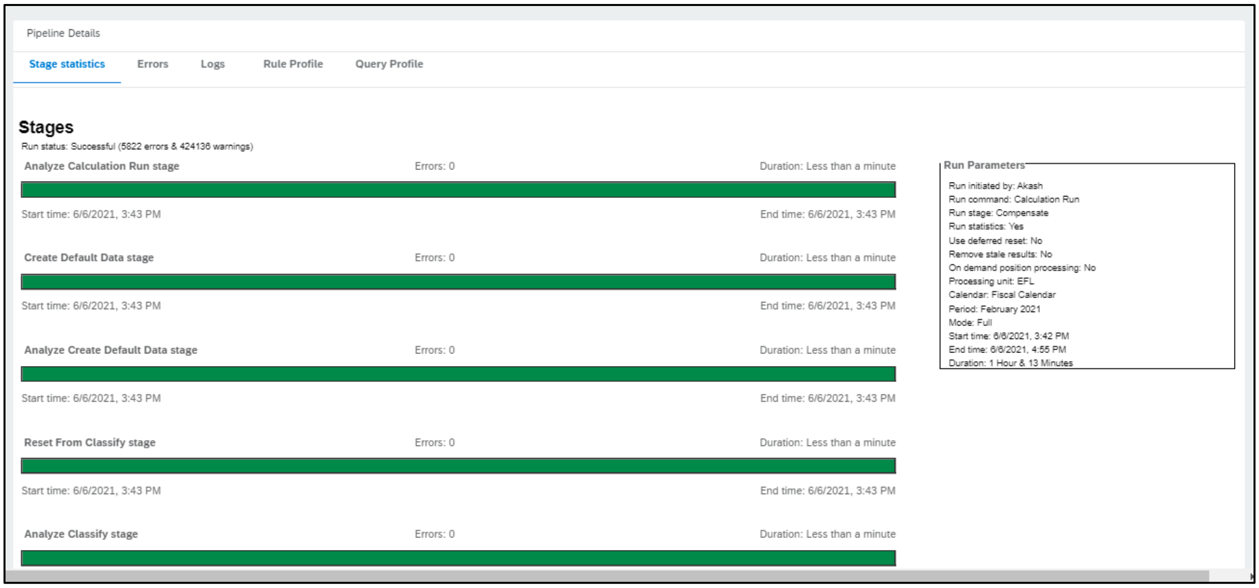


- ## Pipeline workspace

  The summary pane of the Calculation workspace displays information about each calculation run. The detail pane of the Calculation workspace contains the Stage Statistics tab.

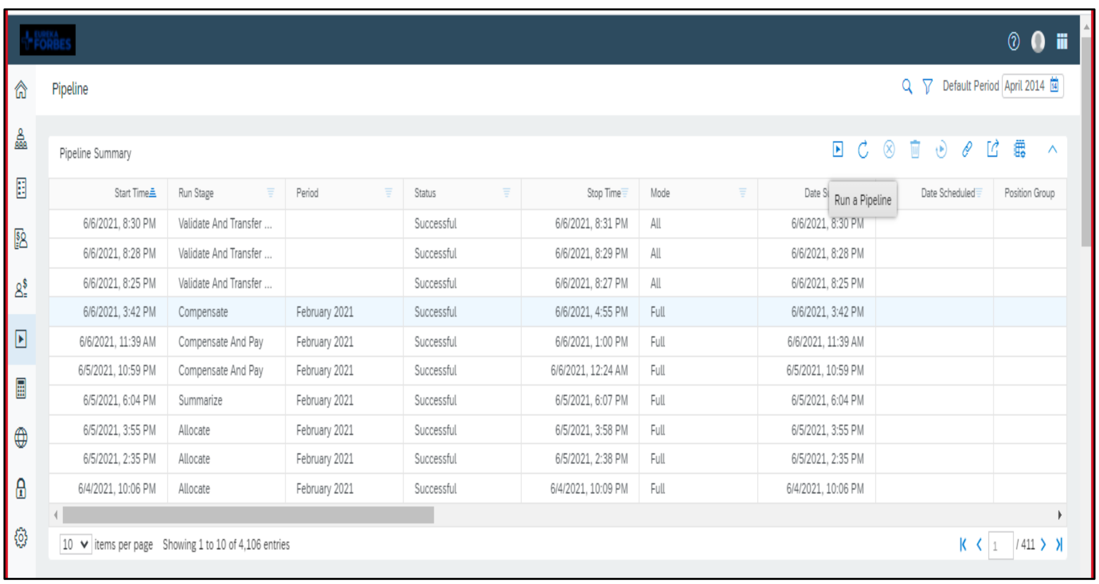
  You can submit, view, and manage your calculation jobs from the Calculation workspace. The Calculation workspace displays jobs and the job's status. The queue displays submitted and scheduled runs, as well as the last completed run. Completed jobs are removed automatically as the queue cycles through the list.



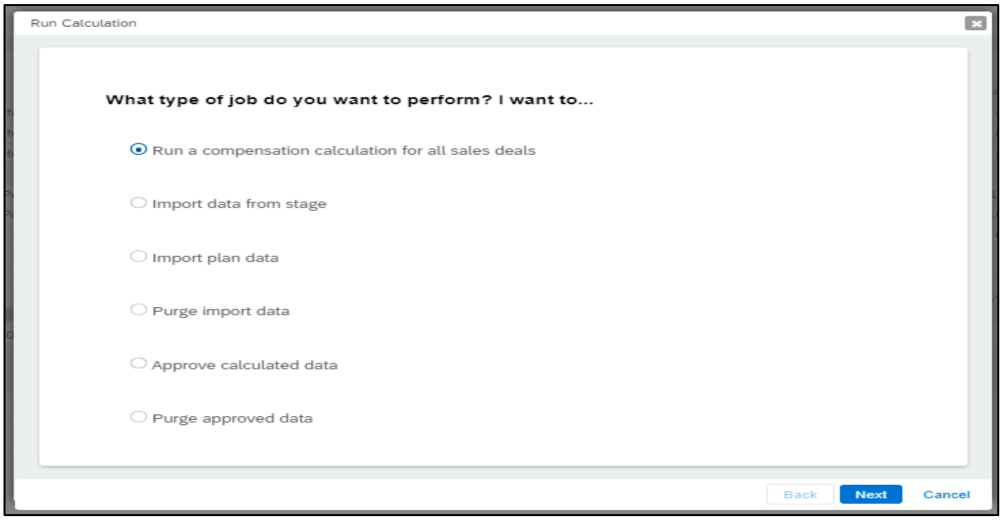


Follow the below steps to run the pipeline.

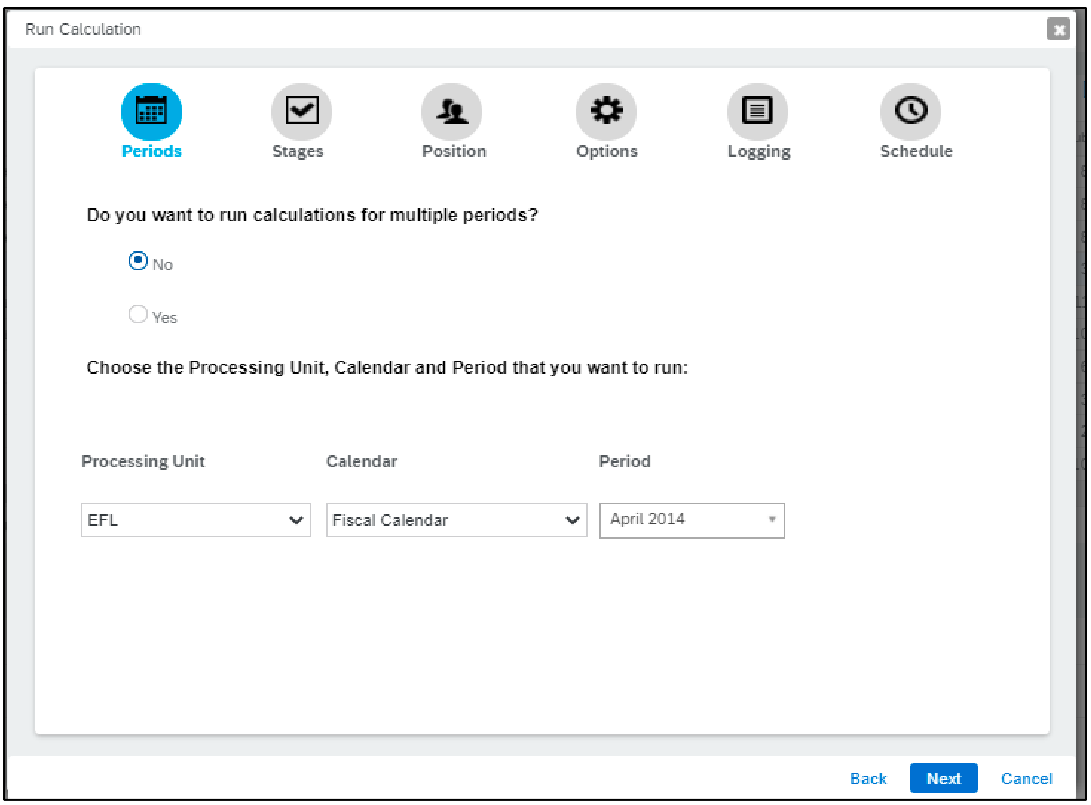
1. Click on the run button as below shown in the screenshot.



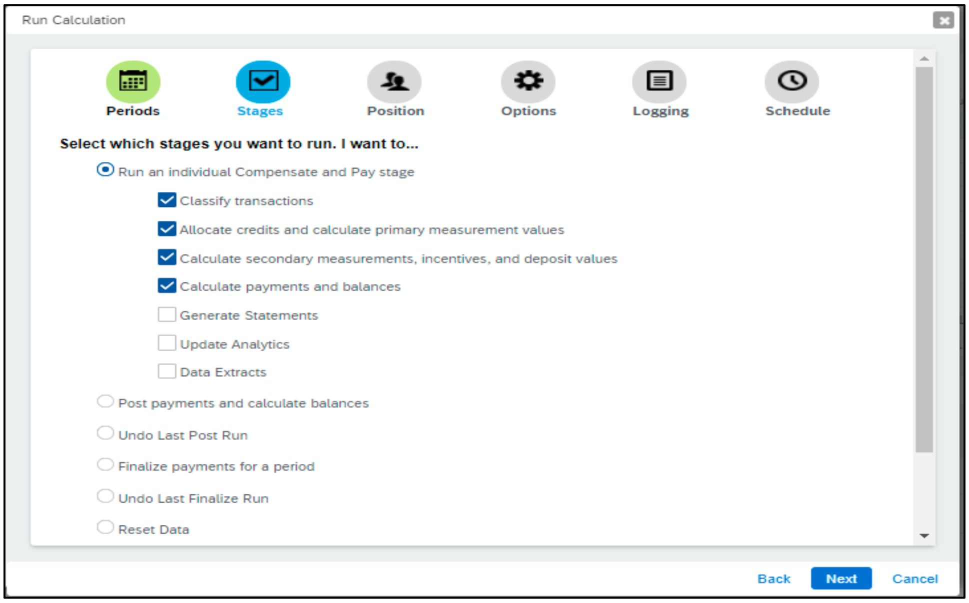
2. Please select the type of job to perform.



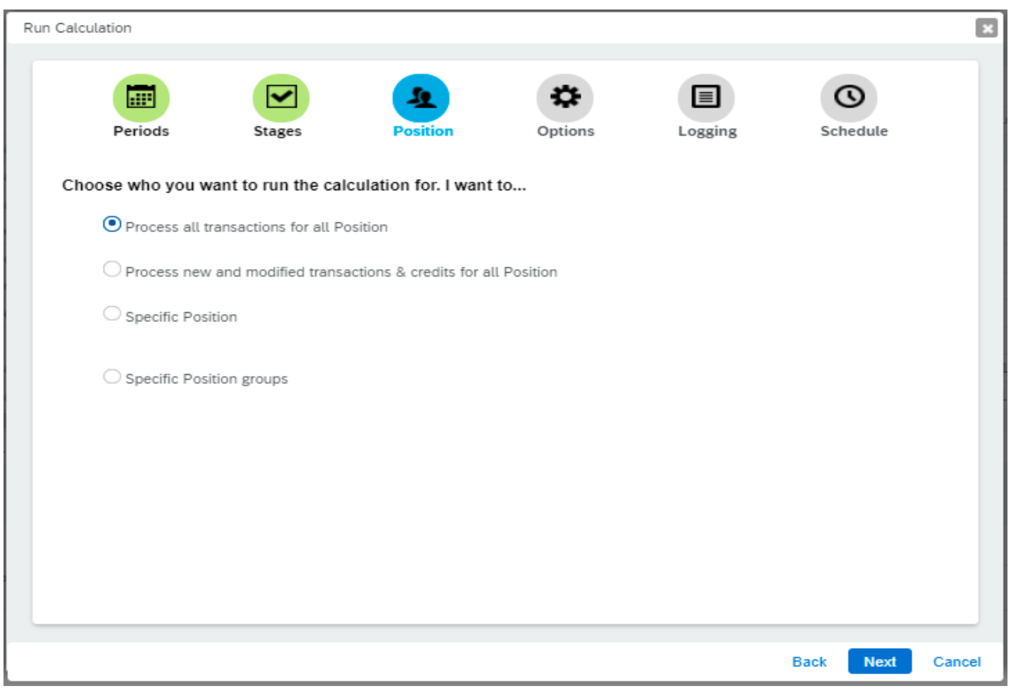
3. Choose the Processing Unit, Calendar and Period that you want to run as shown Below



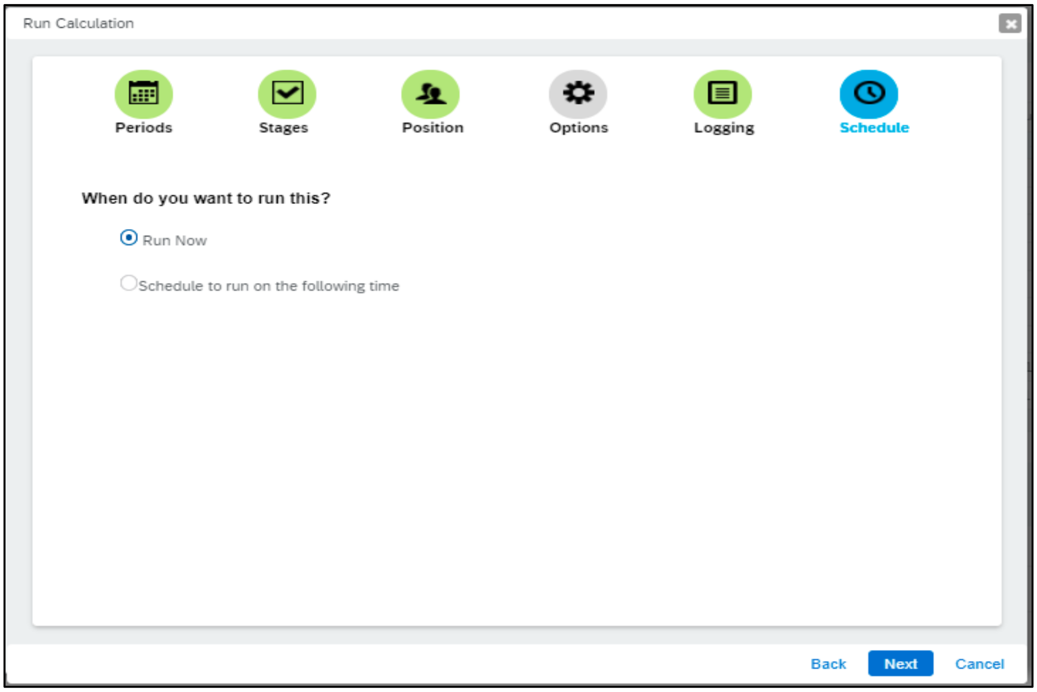
4. Select for which stages you want to run.



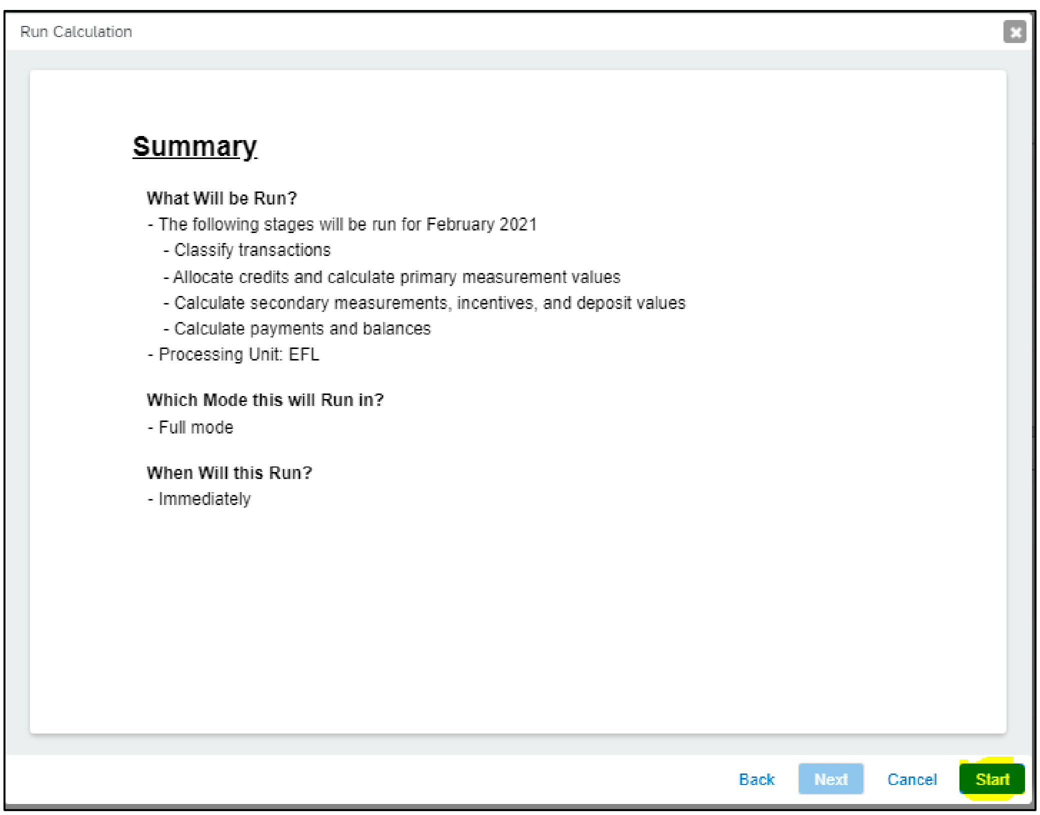
5. Choose for whom want to run the calculation (All Positions, Specific Position, Specific Position Group)



6. Select when do you want to run this calculation.

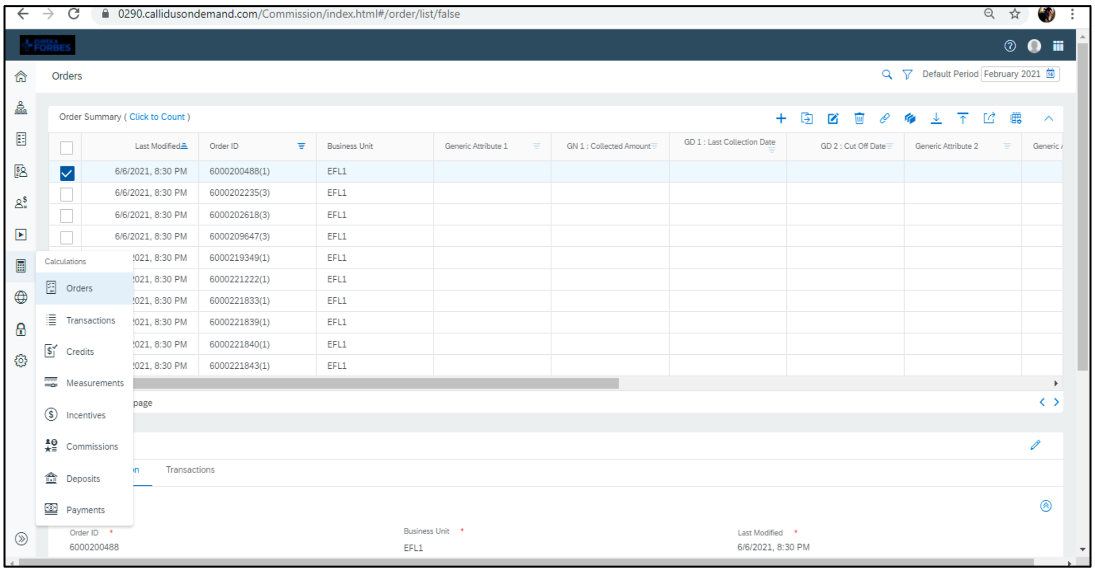


7. Click on start to run the pipeline



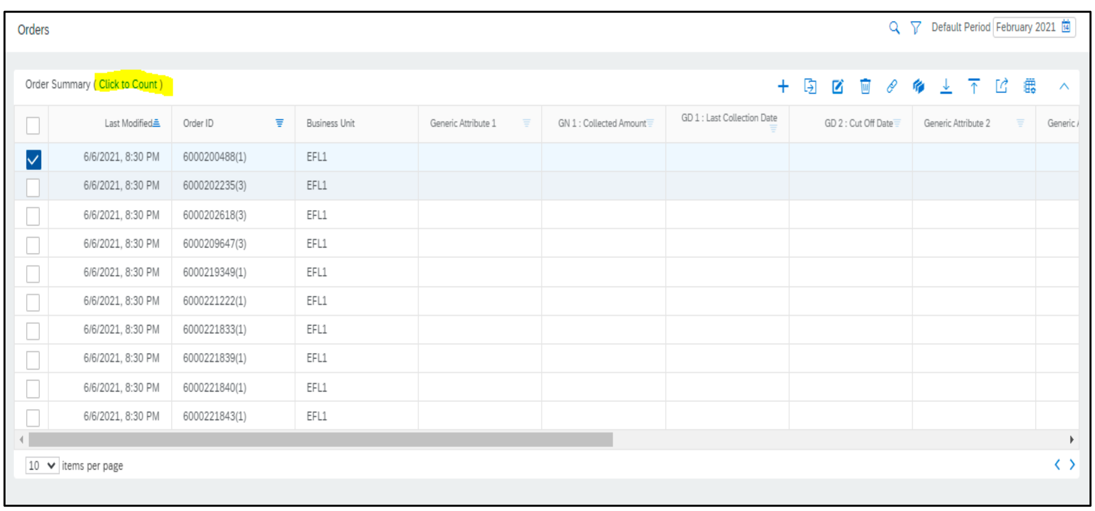
- **<u>Orders, Transactions, and Credits in Tree View:</u>**

In tree view, the Orders, Transactions, and Credit's workspaces are similar. In all three, you can view the relationships between orders, transactions, and credits. You can expand the tree view to see the transactions that belong to each order, and the credits that are associated with each transaction. All objects - imported, manually created, or, in the case of credits.



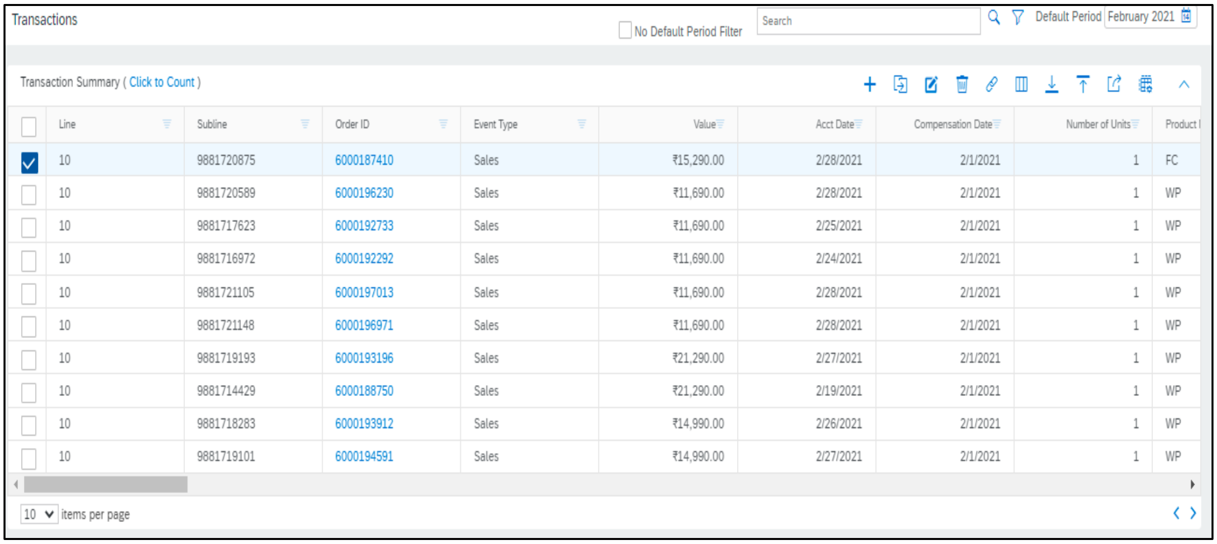
- **Order Workspace**

The following figure shows the Order tab and the summary panel of the Orders workspace. Choose Click to Count link to display the total.



- ## Transaction Workspace

  The following figure shows the summary pane of the Transactions workspace in list view. In list view, you can view transactions as a list.



Transactions

No Default Period Filter

Search

Default Period February 2021

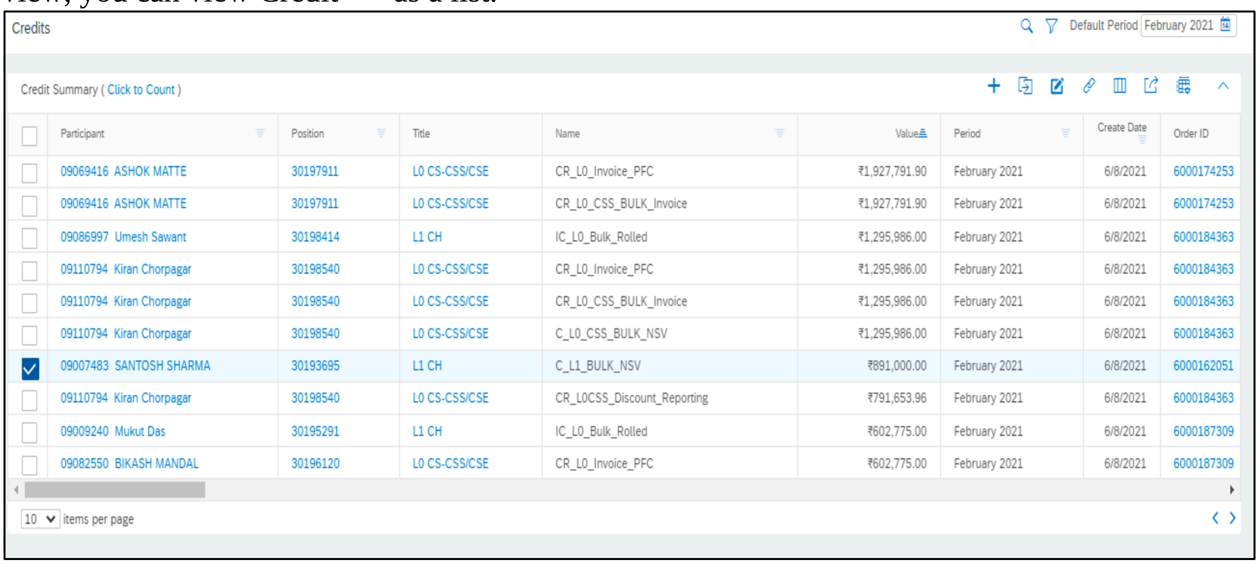
Transaction Summary (Click to Count)

Line	Subline	Order ID	Event Type	Value	Acct Date	Compensation Date	Number of Units	Product I
10	9881720875	6000187410	Sales	₹15,290.00	2/28/2021	2/1/2021	1	FC
10	9881720589	6000196230	Sales	₹11,690.00	2/28/2021	2/1/2021	1	WP
10	9881717623	6000192733	Sales	₹11,690.00	2/25/2021	2/1/2021	1	WP
10	9881716972	6000192292	Sales	₹11,690.00	2/24/2021	2/1/2021	1	WP
10	9881721105	6000197013	Sales	₹11,690.00	2/28/2021	2/1/2021	1	WP
10	9881721148	6000196971	Sales	₹11,690.00	2/28/2021	2/1/2021	1	WP
10	9881719193	6000193196	Sales	₹21,290.00	2/27/2021	2/1/2021	1	WP
10	9881714429	6000188750	Sales	₹21,290.00	2/19/2021	2/1/2021	1	WP
10	9881718283	6000193912	Sales	₹14,990.00	2/26/2021	2/1/2021	1	WP
10	9881719101	6000194591	Sales	₹14,990.00	2/27/2021	2/1/2021	1	WP

10 items per page

- ## Credit Workspace

  The following figure shows the summary pane of the Credits workspace in list view. In list view, you can view Credit as a list.



Credits

Default Period February 2021

Credit Summary (Click to Count)

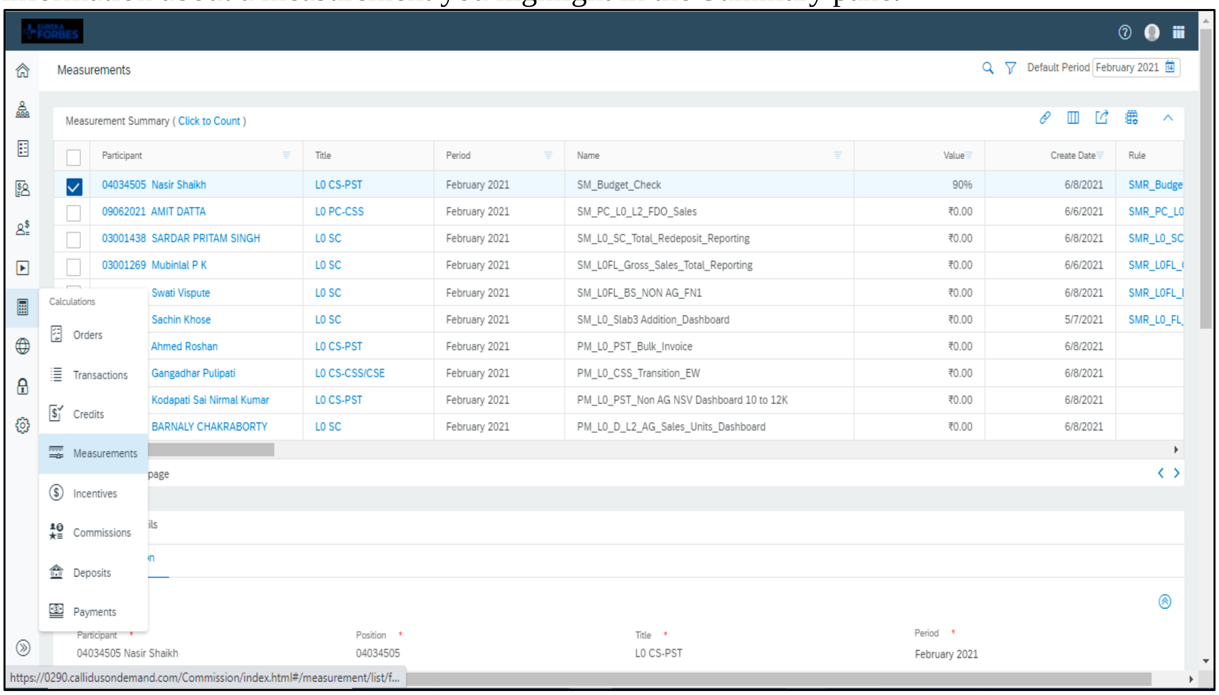
Participant	Position	Title	Name	Value	Period	Create Date	Order ID
09069416 ASHOK MATTE	30197911	L0 CS-CSS/CSE	CR_L0_Invoice_PFC	₹1,927,791.90	February 2021	6/8/2021	6000174253
09069416 ASHOK MATTE	30197911	L0 CS-CSS/CSE	CR_L0_CSS_BULK_Invoice	₹1,927,791.90	February 2021	6/8/2021	6000174253
09086997 Umesh Sawant	30198414	L1 CH	IC_L0_Bulk_Rolled	₹1,295,986.00	February 2021	6/8/2021	6000184363
09110794 Kiran Chorpagar	30198540	L0 CS-CSS/CSE	CR_L0_Invoice_PFC	₹1,295,986.00	February 2021	6/8/2021	6000184363
09110794 Kiran Chorpagar	30198540	L0 CS-CSS/CSE	CR_L0_CSS_BULK_Invoice	₹1,295,986.00	February 2021	6/8/2021	6000184363
09110794 Kiran Chorpagar	30198540	L0 CS-CSS/CSE	C_L0_CSS_BULK_NSV	₹1,295,986.00	February 2021	6/8/2021	6000184363
09007483 SANTOSH SHARMA	30193695	L1 CH	C_L1_BULK_NSV	₹891,000.00	February 2021	6/8/2021	6000162051
09110794 Kiran Chorpagar	30198540	L0 CS-CSS/CSE	CR_L0CSS_Discount_Reporting	₹791,653.96	February 2021	6/8/2021	6000184363
09009240 Mukut Das	30195291	L1 CH	IC_L0_Bulk_Rolled	₹602,775.00	February 2021	6/8/2021	6000187309
09082550 BIKASH MANDAL	30196120	L0 CS-CSS/CSE	CR_L0_Invoice_PFC	₹602,775.00	February 2021	6/8/2021	6000187309

10 items per page

- ## Measurements Overview
  Measurements are generated by measurement rules and are based on credits or other calculations. There are two kinds of measurement rules and hence measurements: primary and secondary. A measurement rule that calculates an aggregate of credits generates a primary measurement; a measurement rule that calculates an aggregate of measurements generates a secondary measurement.

  Measurement Workspace:
  After you run the calculation, the Measurements workspace displays both primary and secondary named measurements.

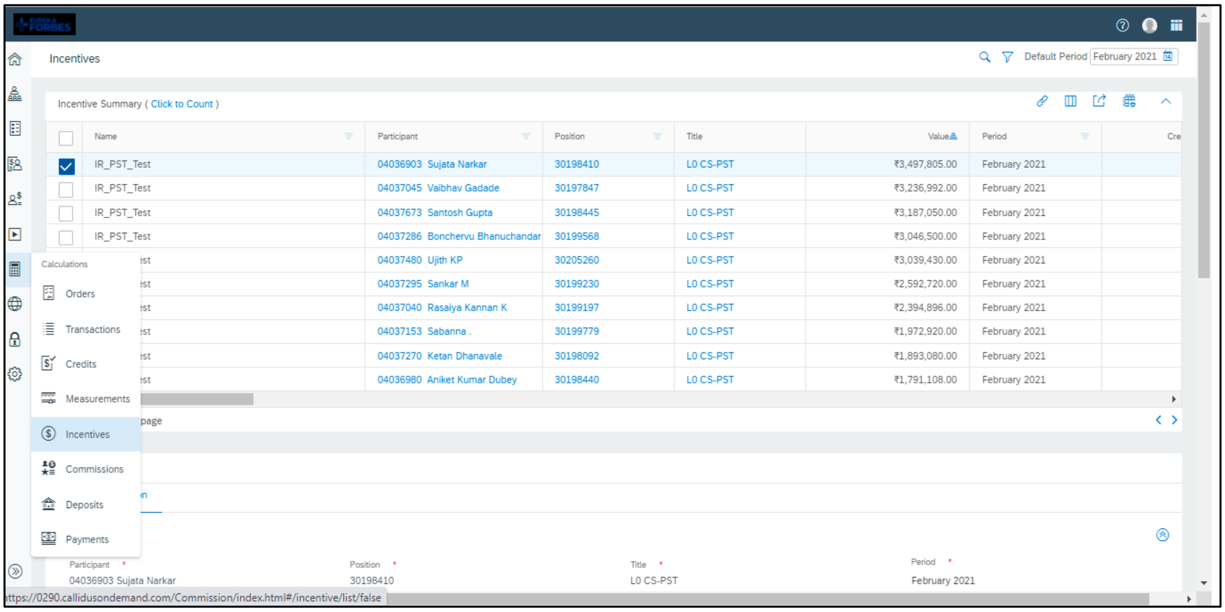
  The following figure shows the Measurement tab. The detail pane displays detailed information about a measurement you highlight in the Summary pane.



- ## Incentives Overview
  An incentive is the result of comparing measurements or credits to targets. An incentive is the output of an incentive rule, which calculates commissions or bonuses for a position assignment.

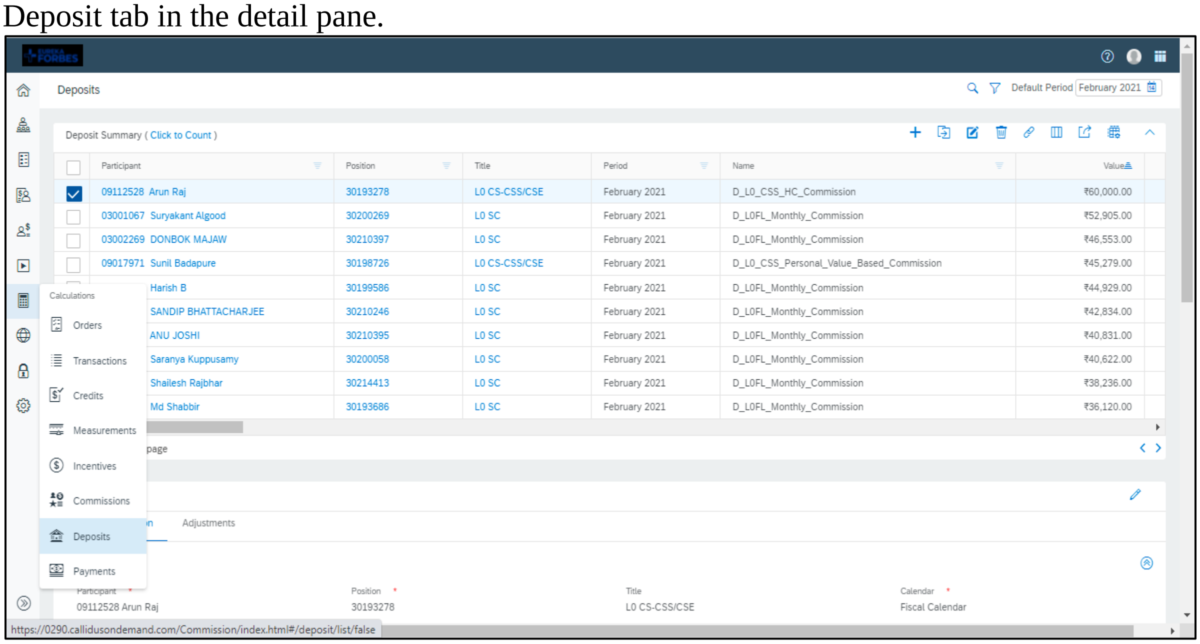
- **Incentive Workspace:** In the Incentives workspace, you can view incentives and objects related to those incentives.

The following figure shows you the summary pane of the Incentives workspace and the Incentive tab in the detail pane. After you run the calculation, Commissions displays the output of all commission and bonus rules in the Incentives workspace.



- **Deposit Workspace:** The Deposits workspace lets you see and adjust deposits, which represent amounts to be paid to each position assignment processed in the associated deposit rule. The detail pane of the Deposits workspace can contain two or three tabs, depending on whether or not your Commissions Administrator has enabled custom attributes for deposits.

  The following figure shows you the summary pane of the Deposit workspace and the Deposit tab in the detail pane.



SEARCH

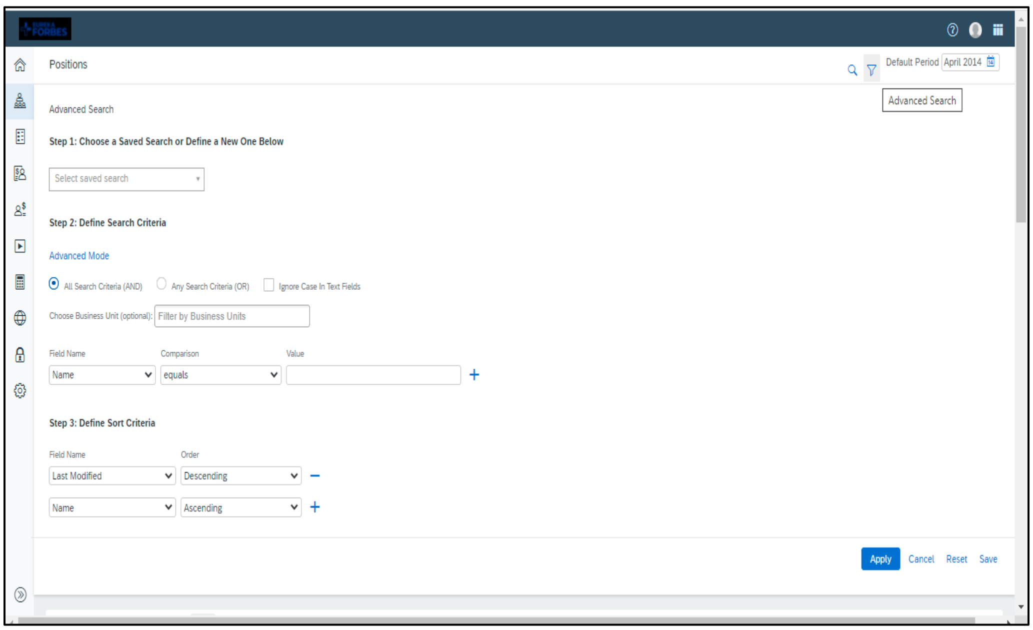
SAP Commissions provides you with different search options like Advanced Search and Related Search. These options give you quick access to compensation and result-data for research purposes.
Commissions search options enable you to do the following:

- Using Advanced Search in list view, you can find specific objects in a workspace.
- Using Related Search, you can research the associations between data.

Performing Advance Search

In Advanced Search, you can construct a search by selecting specific fields. The fields that are available for the search are based on the workspace that the search is launched from. Advanced Search is available in all workspaces except the Calendars and Customization workspaces.

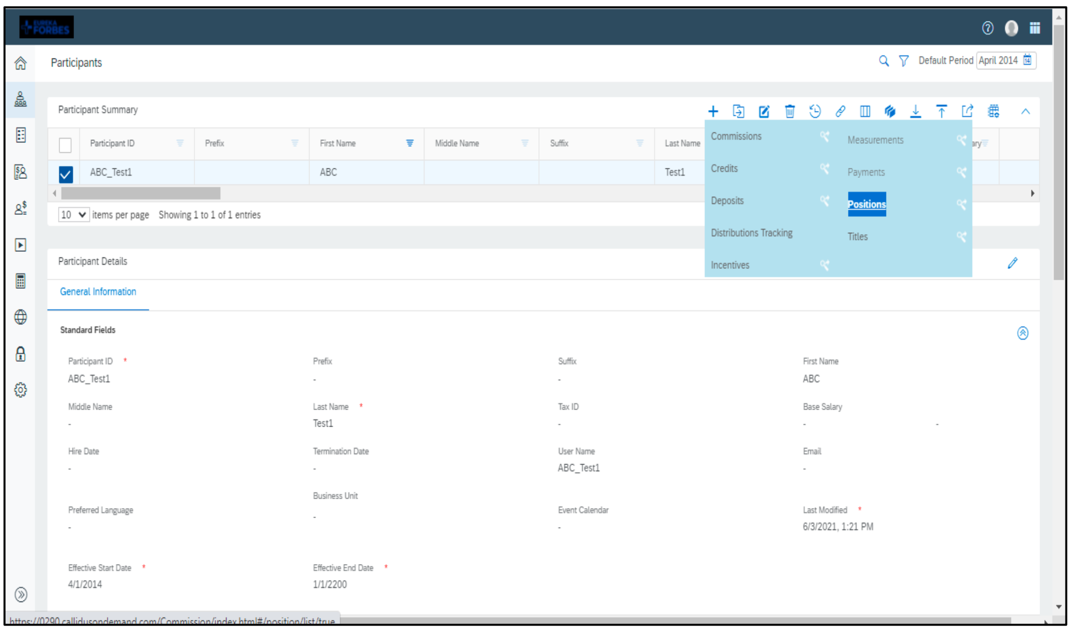
The following figure shows you the Performing advance search option in SAP C.



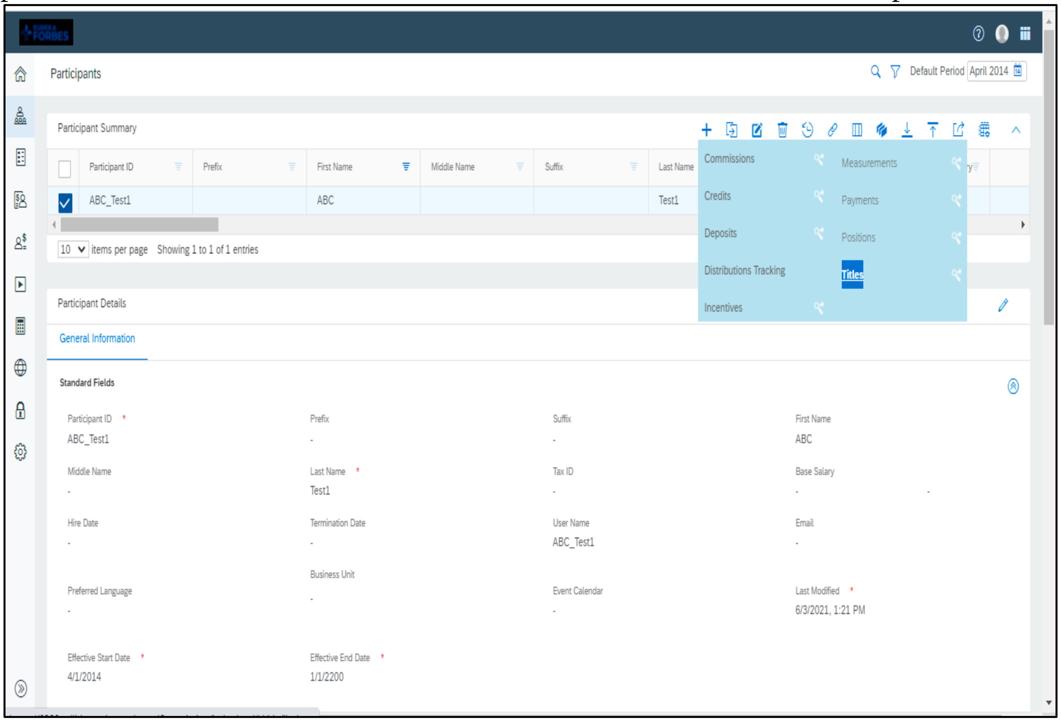
Performing a Related Search

When searching for related information, SAP Commissions finds the items that are effective in the default period. For example, if you perform a simple or advanced search for a title in the *Titles* workspace. If you perform a related search for positions for that title, only those positions that are currently associated with that title are found. The general rule with related searches is that only objects directly related to a selected object are found. Objects that are indirectly related are not found. For example, if you select a rule in the *Rules* workspace and perform a related search for fixed values, the search returns the fixed values directly referenced by the rule, but not those referenced by a formula used in the rule. However, several exceptions to this rule do exist. For complete information on what each related search for each workspace returns.

The following figure shows you the Performing related search option in SAP C.



From the Participant workspace you can go to related search and you can view related positions, Titles and related Credits, Measurements, Incentive and Deposits.



From the Position workspace you can go to related search and you can view for that positions related Plan, Titles, Subordinates, Credits, Measurements, Incentive and Deposits.