



User Guide | PUBLIC

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Administrator Design Help

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1 Administrator Design Help

Learn how to set up security roles, user permissions, and access to business units. Learn about configuring workspaces, organization data, incentives, and more.

Quick Start Guide

- [Getting Started \[page 13\]](#)
- [Workspace Basics \[page 17\]](#)
- [Search \[page 49\]](#)
- [Organization Data \[page 62\]](#)
- [About Incentives \[page 328\]](#)
- [Plans \[page 92\]](#)

2 Getting Started

When implemented Commissions, your Commissions administrator creates users and assigns them with the security roles that govern their access to different operations. Your Commissions administrator must provide you with a user account that includes a username and password before you can access Commissions. Your security role and its permission settings influence what you can and can't access and what actions you can or can't perform. Furthermore, if business units are implemented, you can only access objects that belong to those business units to which you as a user assigned. See the Commissions Administrative Tasks for more information about security roles and permissions and read-only and full access to business units.

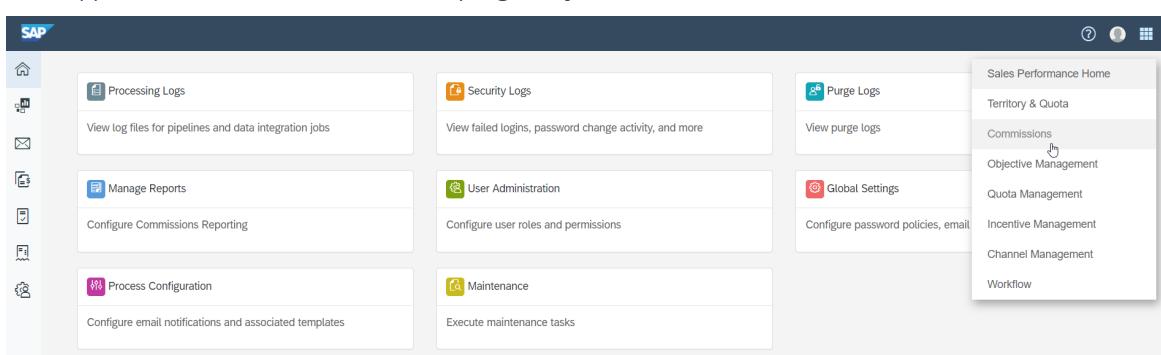
Related Articles

- Starting Commissions Manager [page 13]
- Customizing the Display [page 15]
- Workspace Basics [page 17]
- Operation Basics [page 34]
- Periods, Dates, and Versions [page 42]

2.1 Starting Commissions Manager

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; ensure that the application server is running.

1. Copy and paste the following URL into your browser: <http://hostname:port/SalesPortal/>
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.



- Click **Commissions**. This step takes you to the Commissions home-page.

| Manage Organization | Manage Plans | Review Calculations | Manage Setup |
|---|---|--|---|
| Use these workspaces to manage your sales reps, job roles, and sales hierarchies. | Use these workspaces to manage your incentive compensation plans and components. | Use these workspaces to calculate, research, and reconcile your commission results. | Use these workspaces to setup list data, preferences, and security. |
|  Participants |  Plan Data |  Run |  Global Values |
|  Positions |  Compensation Elements |  Calculations |  Security |
|  Relationships |  Plan Communicator | |  Preferences |
|  Titles | | | |

If this is your first login, Commissions opens the first period of the main monthly calendar. You can use the Set my default view period to preference to determine what default period should be used on subsequent sign-ins. See the *Commissions Administrative Tasks* for information on configuring preferences. The below image displays Commissions home page.

Use the *Sign Out* option from the user profile to sign out of *Commissions* or the *Sales Portal*. After you sign out, close the browser window. This ends the database connection.

Setting the Default Period

When you sign in to Commissions for the first time, the Default Period is set to the in the Main monthly calendar. It can be reset to another period on the current calendar, a period on a different calendar, or a specific date using the Calendar field tab as shown in the following figure. You can use the Set my default view period preference to determine what default period should be used on subsequent logins'. See the *Commissions Administrator Help* for information on configuring preferences.

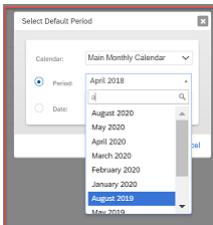
When you specify a period for your default period, only those objects that are effective as of the last day of that period are displayed. For example, if your period is July 2008, and there are three versions of a position effective during that month—July 1 through July 10, July 11 to July 20, and July 21 to EOT—only the last version (July 21 to EOT) is displayed. To see the other versions that are effective during July, you can use the Manage Version icon to view, and modify if necessary, the other versions. As an alternative, you can also specify a specific date for the default period.

i Note

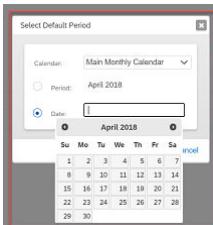
There is a significant exception to the previous rule. If you specify a period for your default period, objects that have been end-dated in that period are displayed even though they are not current as of the last day of the period. For example, if the period specified is July 2008, all objects with effective end dates between July 1 and July 30 are displayed.

Perform the following steps to specify a default period:

- Click *Calendar* next to the *Default Period*. Increase the width of your Commissions window if the default period field is not visible in the upper-right corner of your window.
- Select a calendar from the *Select Default Period* dialog
- Select the *Period* or search from the auto-populated search bar. If a period has been finalized, an (f) icon is displayed after the period name.



4. Click the *Date* option and set the date.



5. Click *Ok*.

i Note

If a period selected, the name of the period displays in the Default Period field. If you specify a date that date displays in the Default Period. The Calendars and periods displayed depend on what calendars have been set up by your Commissions Administrator. See Commissions Administrator Help for more information on creating calendars.

2.2 Customizing Display

You can customize some aspects of SAP Commissions display and behavior. For example, you can do all of the following:

- Change the order in which columns display
- Change object and attribute names in workspaces
- Change the sort order of information in columns
- Resize some windows and dialogs

Changing the Column Display

This section contains a summarized view of the record. You can add or remove columns to the summarized view by clicking the *Configure Summary* view option.

Configure Summary View

The screenshot shows the 'Configure Summary View' dialog box. On the left, under 'Available Fields', there is a search bar and a large empty area. On the right, under 'Current Fields on Summary View', a list of fields is shown in a scrollable list:

- Participant ID *
- Prefix
- Suffix
- First Name
- Middle Name
- Last Name *
- Tax ID
- Base Salary
- Hire Date
- Termination Date
- User Name
- Email
- Business Unit
- Last Modified *
- Effective Start Date *
- Effective End Date *
- GA 1
- GB 1
- GD 1
- CN 1

A checkbox at the bottom left of the dialog is labeled 'Use fixed height of summary view for all objects.' At the bottom right, there are three buttons: 'Ok', 'Use Default', and 'Cancel'.

In the Summary view, you can add or remove columns from *Available Fields* into *Current Fields* using drag-drop method. However, mandatory fields cannot be deselected from the *Current fields* section.

Changing Object and Attribute Names in Workspaces

If you have appropriate security access, you can customize names of objects and object attributes in the Customization workspace. See the Administrator Design Help for more information on renaming objects and their attributes.

- The customization is supported by Reports and Dashboards.

Changing the Column Information Sort Order

In the summary view, you can change the sort priority and order the columns. If the information was sorted when the original search was done, the sort indicator arrow indicates whether the sort was ascending (an up arrow) or descending (a down arrow). Clicking a column label re-sorts that column and changes its sort priority to primary. If a column was not included in the original sort priority, it can be added by clicking its label. When a column is added, its sort priority defaults to primary, and the sort order defaults to ascending.

i Note

List attributes, such as business units, cannot be added to the sort priority. A list attribute is an attribute that can have a single value, multiple values, or, in some instances, no (null) values.

Resize Dialogs and Windows

You can resize some dialogs and windows to display more data. For example, the [Versions](#) dialog can be resized to display more fields. Application Interoperability If you attempt to edit an object in SAP Commissions that is being edited by another user in such case SAP Commission displays a warning message: There are errors in your form. Please correct them before saving.

Errors:

Plan: "M&HCV Const Sch" is currently being modified by another user. Please try again later.

See the Commissions Administrator Online Help for more information on application interoperability.

2.3 Workspace Basics

Commissions groups related compensation tasks into workspaces.

The Workspace: A First Look

A typical Participants' workspace is shown in the following figure.

Application elements are located at the top of the browser window. General application elements include:

- **Application banner:** Changes to reflect the currently running application
- **Help Menu:** Contains the Help and Log Out menus
- **Help:** Provides links to the application help content
- **Log Out:** Logs you out of the application
- **Application Menu:** From this menu, you can navigate to an application

i Note

The application might vary depending on what products are installed.

- **Menu Options:** Helps you to navigate through workspaces.
- **Workspace toolbar:** Contains action and view icons
- **Workspace breadcrumb view:** Displays the breadcrumb for the Advance search
- **Workspace summary panel:** Displays the record entry selected, as well as the object record count, pagination information

Commissions provides you with the following search options, and access to the following panel depends on the workspace:

- **Simple search:** Provides access to the search functionality
- **Advanced search:** Provides ability to search by specific fields or constructing SQL like queries.

i Note

You can also perform some processing tasks from the Commissions command line. See the Commissions Administrator Help for more information.

Related Articles

- [Summary and Detail Views \[page 18\]](#)
- [Workspace Views \[page 19\]](#)
- [Custom and Reporting Attributes \[page 20\]](#)
- [Workspaces \[page 21\]](#)
- [Workspace Refresh \[page 26\]](#)
- [Interface Elements \[page 26\]](#)

2.3.1 Summary and Detail Views

All workspaces are divided into summary view and details view.

In several workspaces, you can view the summary in list view or tree view. The summary view displays enables you to view object details as well as sort and select objects.

The details view displays the details of objects that you select in the summary view. You can use the scroll bar to view all the available fields in the workspace, and the Last Modified field in the summary view enables you to see the most recently modified or added records at the top of the page.

In the details panel, you can create and edit objects. As you enter information in the details view panel, it is reflected in the summary view after you save.

2.3.2 List View & Tree View

View As List

In Commissions, certain workspaces give you different view options for viewing your summary data in a list or tree view and an option for viewing stage tables. If a workspace has a list view option, then the view defaults to list view when you first access that workspace. If you subsequently select tree view, the workspace displays in the tree view the next time user access it during the same working session. The following table shows the view icons associated with each view.

| Main Menu | Workspace |
|----------------|--|
| Organization | Participants, Positions, Titles, and Relationships |
| Classification | When you enter information and Products, Customers, Postal Codes, and workspaces associated with user-defined classifier types |
| Plans | Plans, Fixed Values, Formula, Rate Table, Territory, Variables, Quotas, and Lookup Tables |
| Results | Transactions, Credits, Measurements, Incentives, Deposits, and Payments |
| Administrator | Messages Logs |

The list view displays data in a tabular format. All the workspace in the above table is enabled with the list view. When you navigate to a workspace in list view for the first time during a session, the summary view populates objects to fill the available window space. If you navigate away from the workspace and then return to it, the results displayed are from the last time you accessed that workspace.

View As Tree

When you switch to tree view from the list view, the summary view populates objects to fill the available window space. If you navigate away from the workspace and then return to it, the results displayed are from the last time you accessed that workspace. The tree view displays data in a tree structure that shows relevant data

relationships. For example, in the positions workspace, clicking the tree view displays the reporting hierarchy. The nodes in the tree structure can be expanded and collapsed as needed. All the workspace in the following table is enabled with the tree view.

| Control Tab | Workspace |
|---------------|-----------------------------|
| Organization | Positions and Relationships |
| Administrator | Calendars |

2.3.3 Custom Attributes and Reporting Attributes

Custom Attributes

You can use custom attributes to enter additional information about objects when enabled. For example, in the *Participants* workspace, you might use custom attributes to enter values for a participant's street address and email address. custom attributes can be enabled for all the following workspaces:

- Participant
- Customer
- Credits
- Titles
- Postal Codes
- Measurements
- Positions
- Orders
- Incentives
- Products
- Transactions
- Deposits

You can add the enabled Custom attributes to Summary or Details view by configuring the Summary view and Details view. You can include data stored in Custom attributes in your compensation rules. For example, you can include a Custom attribute that stored a country code in a rule's condition. The following figure provides an example of custom attribute information in the Participants workspace.

Reporting attributes

Used only for reporting purposes. They cannot be used in Compensation plan rules, and therefore are not included in Calculation processing. Reporting attributes can be enabled for the following workspaces:

Reporting Attributes

- Participant
- Positions

- Transactions

2.3.4 Menu Tabs and Related Workspaces

Each workspace in Commissions provides you an access to specific objects. For example, from the [Organization](#) tab, you can access organization related compensation data objects such as participants and positions using appropriate workspace icons. Your security role and its permission settings influence what you can and cannot access, and what actions you can or cannot perform. If business units are implemented, you can only access objects that belong to those business units to which you have been assigned. See the Commissions Administrator Help for more information about security roles and permissions, as well as access to business units. This section lists the available workspaces and summarizes the objects available to you in each workspace. The remaining topics in this online help provide workflows and details for working with the objects. The following tables describe the workspaces available in the [Organization](#) tab.

| Workspace | Tasks |
|--|--|
| Participants: Workspace for participants in compensation plans. | <ul style="list-style-type: none"> • Create, edit, copy, and delete participants and participant information • Search for participants • Find related objects • Data loaders |
| Positions: Workspace for defining the positions in your organization. A position is a specific, unique job in a specific area of the company. You can view positions as a reporting hierarchy in the tree view. | <ul style="list-style-type: none"> • Create, edit, copy, and delete positions and position information • Search for positions • Assign plans to positions • Find related objects • Data loaders |
| Relationships: Describes a path for rolling credits from the source position to receiving positions in that single roll path. Roll relationships are assigned to a roll type. | <ul style="list-style-type: none"> • Create, edit, copy, and delete roll types and roll relationships • Search for relationships and roll types • Find related objects |
| Titles: Titles workspace for all job types in your organization. | <ul style="list-style-type: none"> • Create, edit, copy, and delete titles • Search for titles • Assign plans to titles • Find related objects • Data loaders |

| Workspace | Tasks |
|---|---|
| Plans: Workspace for creating compensation plans. Compensation plans contain compensation rules that typically correspond to the different stages of the Commissions process engine, called the calculation. | <ul style="list-style-type: none"> • Create, edit, copy, and delete plans and plan information • Search for plans • Create, add, and remove rules associated with a plan • Find related objects |
| Plan Components: Components Workspace for creating plan components. The components are templates that contain a set of Rules. | <ul style="list-style-type: none"> • Create, edit, copy, and delete plan components. • Assign components to plans. • Distribute plan documents. |
| Territories: Workspace for territories, the named combination of categories and classifiers that filters input to credit and measurement rules. | <ul style="list-style-type: none"> • Create, edit, copy, and delete territories • Search for territories • Find related objects |
| Quotas: Workspace for quotas, values that apply across an entire reporting structure. | <ul style="list-style-type: none"> • Create, edit, and delete quotas • Search for quotas • Find related objects |
| Rate Table: Workspace for rate tables, tiered tables used in an incentive rule to calculate how much a position assignment receives in commissions based on a step-commission rate. | <ul style="list-style-type: none"> • Create, edit, copy, and delete rate tables • Search for rate tables • Find related objects |
| Lookup Table: Workspace for lookup tables, n-dimensioned tables that store indexed values retrieved by rules and formulas. | <ul style="list-style-type: none"> • Create, edit, and delete lookup tables • Search for lookup tables • Find related objects |
| Fixed Values: Workspace for fixed values, a value that can be used wherever a value is called for. | <ul style="list-style-type: none"> • Create, edit, copy, and delete fixed values • Search for fixed values • Find related objects |
| Rules: Workspace for compensation rules. Each rule type provides processing directions for the corresponding calculation stage. Compensation rules in each plan work together to allocate credits, process compensation results, and determine payments for participants who are assigned to the plan. | <ul style="list-style-type: none"> • Create, edit, copy, and delete rules • Search for rules • Find related objects |
| Formula: Workspace for formulas, user-defined mathematical expressions that produce calculated values. Formulas are used most often in conditions and action statements within a rule, but they can also be employed in rate tables and lookup tables when a calculated value is required. | <ul style="list-style-type: none"> • Create, edit, copy, and delete formulas • Search for formulas • Find related objects |
| Variables: Workspace for variables, the named placeholders used in rules to reference a rule element (such as a rate table, territory, fixed value, or lookup table.) | <ul style="list-style-type: none"> • Create, edit, copy, and delete variables • Search for variables • Find related objects |

The following table briefly describes each of the workspaces available from the Classification tab.

| Workspace | Tasks |
|---|---|
| Categories: Workspace for all categories, used to filter transactions into groups based on specific fields on each transaction. | Create, edit and delete category hierarchies, categories, and classifiers, including: <ul style="list-style-type: none">• Add classifiers to categories• Remove classifier assignments• Move classifiers to different category hierarchies and categories• Find related objects for category hierarchies, categories, and classifiers• Data Loaders |
| Products: Workspace for Products categories. If your company allocates credits based on product information found in the transaction, you can use a category hierarchy with Product classifiers to filter for transactions that contain specific product information. | Create, edit, copy, and delete product classifiers and product categories, including: <ul style="list-style-type: none">• Add product classifiers to product categories• Remove product classifier assignments• Search for product details• Find related objects• Data Loaders |
| Customer: Workspace for Customer categories. If your company allocates credits based on customer information found in the transaction, you can use a category hierarchy with customer classifiers to filter for transactions that contain specific customer information. | Create, edit, copy, and delete customer classifiers and customer categories, including: <ul style="list-style-type: none">• Add customer classifiers to customer categories• Remove customer classifier assignments• Search for customer details• Find related objects• Data loaders |
| Postal Code: Workspace for postal codes categories. If your company allocates credits based on postal codes found in the transaction, you can use a category hierarchy with postal code classifiers to filter for transactions that contain specific postal codes. | Create, edit, copy, and delete postal code classifiers and postal code categories, including: <ul style="list-style-type: none">• Add postal code classifiers to postal code categories• Remove postal code classifier assignments• Search for postal codes• Find related objects• Data loaders |

The following table briefly describes the workspace available from the [Models](#) tab.

| Workspace | Tasks |
|--|---|
| Models: Workspace for modeling future periods based on historical data. Available model types include. | <ul style="list-style-type: none"> • Create model, delete model • Run the calculation for modeled periods • View model run results |
| The following table briefly describes each of the workspaces available from the calculation tab. | |
| Workspace | Tasks |
| Pipeline: Workspace for compensation processing, which includes running the calculation, importing and purging data, running reports generation and ETL. The workspace shows execution progress in real time. Optional profiling is available for any calculation run. See the Commissions Administrator Help for information on running the calculation. | <ul style="list-style-type: none"> • Run the calculation for any period or multiple periods at once • Run the calculation for specific stages • Schedule a calculation run • Cancel a calculation run • Search for calculation runs for any period • Import data from the staging tables • Import XML data • Update analytics • Generate reports • Purge data from the staging tables |
| Orders: Workspace for order- and transaction- level credit allocation results data. | <ul style="list-style-type: none"> • Create, edit, view, copy, and delete orders • Search for orders • Find related objects • Data loaders |
| Transactions: Workspace for transaction level credit allocation results data. Transactions are business events that drive the compensation process. Transactions are the smallest units of sales data. They are classified by categories, and credits are allocated to classified transactions. | <ul style="list-style-type: none"> • Create, edit, view, copy, and adjust the value of transactions • Search for transaction details • Find related objects • Data loaders |
| Credits: Workspace for credits allocation results data. Credits are allocation values assigned to a position assignment. Credits are allocated to either a sales transaction or to an order (or parts of an order). | <ul style="list-style-type: none"> • Create, edit, view, and copy credits; and transfer and adjust the value of credits • Search for credits • Find related objects |
| Measurements: Workspace for measurement results data. Primary measurements aggregate the credits or other items for position assignments. Typically, aggregating credits involves summing the monetary value of credits. Secondary measurements sum primary measurement values. | <ul style="list-style-type: none"> • Search for and view measurements • Find related objects |
| Incentives: Workspace for incentive results data. Incentives are the output of incentive rules, which compare measurements or credits to quotas and rates. | <ul style="list-style-type: none"> • Search for and view incentives • Find related objects |

| Workspace | Tasks |
|---|---|
| Commissions: Workspace for Commissions, a kind of incentive. | <ul style="list-style-type: none"> Search and view commissions to be paid Find related objects |
| Deposit: Workspace for deposit results, which reflect incentives deposited for eventual payment. | <ul style="list-style-type: none"> Create, edit, view, and copy deposits Hold, release, and adjust deposits Find related objects |
| Payments: Workspace for payment and balance results. | <ul style="list-style-type: none"> Search for and view payments Find related objects |

See the Commissions Administrator Help for information about the workspaces available from the [Logs](#) and [Administration](#) tabs.

2.3.5 Data Loaders

Upload Data

In the [Orders](#) and [Transactions](#) workspaces for results and the participants, positions; Titles workspaces for organization; categories, products, customers, postal codes for classification; calendars and customization for administration used to upload data contained in an Excel worksheet template matching the columns used in the workspace.

Download Template

In the [Orders](#) and [Transactions](#) workspaces for results, and the participants, positions; titles workspaces for organization; categories, products, customers, postal codes for classification; calendars and customization for administration used to download either an empty template or the data for that workspace to an Excel worksheet containing all columns used in the workspace.

i Note

Dataloaders supports only Excel 2003 workbook format. For the best performance do not use Dataloaders for more than 1000 records per object.

i Note

Bulk BO user assignment must be done through streamline tool. Dataloaders must be used for less than 20 users' updates. Currently, Dataloaders take ~ one min/user in offline synchronization.

i Note

BO groups have to be created in advance with proper permissions. Existing associations that are not specified in the file, will be deleted. If the user-id or email is changed, then all LDAP/BO associations are erased.

Dataloaders Download All

You have a facility to download the dataloaders in batches in Excel format like CSV export. The range of each batch is 1-7000 records.

The download feature supports the following workspaces:

- Participants
- Positions
- Titles
- Orders
- Transactions
- Classification

CSV Export

This is an export format of a file and exists in all the workspaces. If you trigger CSV export for any object in the application, it prompts a notification. The notification is seen even when you logout and login, if the export job is not finished (still in progress).

2.3.6 Workspace Refresh

If an object in a workspace has been changed by a calculation run or by Import, you are notified that a refresh should be done so that you are viewing or editing the most current version. For example, if imported classifiers are part of a category you are viewing or editing in the *Categories* workspace. The changes in the category for those classifiers are not displayed until the workspace in Commissions is refreshed.

In Commissions, the refresh mechanism works as follows:

- If the current workspace is one of the workspaces affected by a calculation run or by import.
- If you are in the process of entering or modifying information, a *Save* dialog box is also displayed.
- If the current workspace is not one of the workspaces with updated objects then no changes occur.
- Affected workspaces other than the current workspace are refreshed in the background. Updated data is displayed the next time you access these workspaces.

2.3.7 Interface Elements: Main Menu

The Main menu contains sub menu options. The Main menu relates to different types of data used in SAP Commissions. After you select the main menu, a sub-menu representing different workspaces of that tab

becomes available. You can click these sub-menu options to go to that workspace. The following table provides you more information on each of the tabs in the control panel and the workspaces available.

| Workspace | Tasks |
|--------------|--|
| Organization | <p>Works with specific information about your company: participants, positions, specific job assignments, titles, reporting relationships, and roll relationships. organization data is often supplied by human resources and the imported into SAP Commissions.</p> <ul style="list-style-type: none">• Participants• Positions• Relationships• Titles |

| Workspace | Tasks |
|-----------|---|
| Plans | <p>Plan Data</p> <p>Sets up the variable compensation plans that determine how people in your organization are paid. Plans are typically created when Commissions is implemented for the first time. You can also create new plans and modify existing plans when required.</p> <ul style="list-style-type: none"> • Plans • Plan Components • Rules • Rules Wizard • Plans Wizard |
| | <p>Compensation Elements</p> <ul style="list-style-type: none"> • Territories • Quotas • Rate Tables • Lookup Tables • Fixed Values • Rules • Formulas • Variables |
| | <p>Models: Model future periods from historical data.</p> <ul style="list-style-type: none"> • Models |
| | <p>Classification</p> <p>You can create, edit, and delete categories, classifiers, and category hierarchies (according to such categories as product, customer, and so on) that determine how transactions are bundled. You can also add custom categories.</p> <ul style="list-style-type: none"> • Categories • Products • Customers • Postal Codes |
| | <p>Plan Communicator</p> <ul style="list-style-type: none"> • Distribution • Distribution Tracking • Documents • Disputes Tracking • Disputes |

| Workspace | Tasks |
|-------------|---|
| Calculation | <p>Run: Runs the pipeline calculation</p> <ul style="list-style-type: none">• Pipeline |
| | <p>Calculation</p> <p>You can view transaction data used as an input to calculation runs and view results data that is based on compensation processing for each period. You typically run the calculation to process compensation payments at least once a period.</p> <ul style="list-style-type: none">• Calculation• Orders• Transactions• Credits• Measurements• Incentives• Commissions• Deposits• Payments |
| | <p>Research: Provides the interface to view calculation data in a single layout</p> <ul style="list-style-type: none">• Research |
| | <p>Stage Tables: Provides the interface to view the stage table data</p> <ul style="list-style-type: none">• Stage Tables |

| Workspace | Tasks |
|---------------|--|
| Administrator | <p>Global values</p> <p>You can create user accounts, roles, calendars, and data types. See the Commissions Administrator Help for more information.</p> <ul style="list-style-type: none"> • Calendars • Credit Types • Event Types • Earning Groups • Earning Codes • Fixed Value Types • Position Groups • Reason Codes • Unit Types • Preference <p>The preference section helps to configure the user or system level preferences.</p> <p>The logs help you to monitor the system. See the Commissions Administrator Help for more information.</p> <p>All the errors are logged into the database and are available from the Message Log workspace.</p> <p>Customers can debug these issues by navigating to the related: position/payee/rule/transaction/credit data.</p> <p>Calculation evaluation errors can be overwritten to warnings.</p> <p>Calculation warnings can be configured, to be logged to database via preferences.</p> <ul style="list-style-type: none"> • Business Units • Processing Units • Roles • Users • Logs • Usage Metrics |

You can find Compensation data within the [Organization](#), [Plans](#), and [Classification](#) tabs, which is also known as reference data and includes information about positions, participants, position assignments, compensation plans & rules, and rule elements (such as Territories, rate tables, and lookup tables). Reference data must exist before you can run the calculation.

Toolbar

The toolbar is available on all of the workspaces. The icons in the toolbar allow you to perform workspace actions. The toolbar has standard icons to most workspaces on the left side. Icons specific to that workspace are shown to the right of the standard icons. Available view icons are on the far right of the toolbar. The following table shows the toolbar icons and provides a brief description.

| Icon | Description |
|---|---|
| Add  | Used to create a new Object |
| Delete  | Used to delete one or more objects. |
| Save  | Used to save information to the Commissions Repository. The Save icon is not enabled until you actually make a change. |
| Cancel  | Used to return the display to its pre-edit state. |
| Copy  | Used to make a copy of a single object selected in the summary pane. The Copy icon is normally enabled when objects are displayed in the summary pane. The Copy icon is not enabled in the Quotas and Lookup Tables workspaces. |
| Audit History  | Used to displays the audit history for a selected record. See the Commissions Administrator Help for more information about the Audit workspace. |
|  | Bulk Edit of a selected row(s) in summary view panel |
|  | Edit the current version, located on the detail pane. |
|  | |

| Icon | Description |
|---|---|
| New Version  | Used to create a new Version of the selected object. |
|  | |
| XML Export  | In workspaces available from the Plans tab, can be used to export plan data and rule element data to an XML file. |
| CSV Export  | In all workspaces, can be used to export data to a CSV file. |
| Related Search  | Exists in Organization, Results, Rule, Rule Elements and Classification WS. Used for related search between objects. Advance related search is provided within the related search. |
| Research View  | Provided in the Organization WS. Takes users to Research view workspace for the selected row. |
| Truncate  | In the Message Log workspace (list view only), opens the Truncate Message Log dialog, so that entries prior to a specified date can be removed from the log. See the Commissions Administrator Help for more information on truncating the message log. |
| Run a Pipeline  | In the Calculation workspace, used to run calculations. See the Commissions Administrator Help for more information on running calculations. |
| Cancel Pipeline  | In the Calculation workspace, used to cancel a selected run. See the Commissions Administrator Help for more information on canceling calculation runs. |
| Restart Pipeline  | In the Calculation workspace, used to restart a selected run. See the Commissions Administrator Help for more information on restarting calculation runs. |
| Delete Pipeline  | In the Calculation workspace, used to delete a calculation from the job queue. See the Commissions Administrator Help for more information on deleting calculations. |
| Download Template or Data  | In the Orders and Transactions workspaces for Results, and the Participants, Positions, and Titles workspaces for Organization used to download either an empty template or the data for that workspace to an Excel worksheet containing all columns used in the workspace. |

| Icon | Description |
|---|---|
| Upload Data  | In the Orders and Transactions workspaces for Results, and the Participants, Positions, and Titles workspaces for Organization used to upload data contained in an Excel worksheet template matching the columns used in the workspace. |
| Run Model  | In the Models workspace, used to run a model on a future period. See the Commissions Modeler User Guide for more information. |
|  | |
| Clear Model Results  | In the Models workspace, used to clear the results from a model run. See the Commissions Modeler User Guide for more information. |

Apart from these, other keyboard shortcuts mentioned below helps you to perform tasks conveniently:

-  - Press Esc key to close the pop-up dialog.

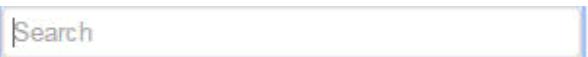
Action Panes

Action panes are available as links in the panel and there visibility is dependent on the workspace. In general, these links are used to perform basic workspace operations such as creating, modifying, deleting, and searching for objects. The following table provides you more information about most Action panes.

| Icon | Operation |
|---|---|
|  | Used to perform a name search, simple search depending on the workspace and active view. |
|  | <p>i Note</p> <p>There is no search capability from the Customization workspace.</p> |
| Advanced Search  | Perform an Advanced search by applying Filters and Sort Criteria |

Field Icons

Commissions provide several field-specific icons to assist you in creating new objects, modifying attributes of current objects, and searching for objects. The following table provides details about most of the field icon used in Commissions.

| Field Icons | Operation |
|---|---|
| Calendar  | Used to display a calendar from which to choose dates. |
| Search  | Used to do a modified simple search (the Save and Manage icons are not included in this Simple Search dialog). |
| Create New  | Used to create new, inline objects. For example, if you are in the Positions workspace, you can create a new title without leaving the Positions workspace. It is also used to create new versions of objects from the Versions for. In the Lookup Tables workspace, it is used to add dimensions to lookup tables, as well as to create new dimensions within a table. |
| Delete  | Used in the Versions for to delete versions and in the Lookup Table workspace to delete dimensions and dimension indexes. |
| Expression  | In the Lookup table and Rate table. The Expression icon to open Legal move editor dialog. |
| Literal  | The Simple/ Literal icon enables users to enter literal value. |
| Legal Move Editor  | Used to open the Legal Move editor dialog to view in expanded mode. |

2.4 Operation Basics

This chapter takes you through different operations that you can perform while using the Commissions application, for example, object selection, deletion, copy, edit, and data validation.

Related Articles

- [Selecting Objects \[page 35\]](#)
- [Expanding and Collapsing in Tree View \[page 35\]](#)
- [Data Validation \[page 35\]](#)
- [Disallowed Special Characters \[page 36\]](#)
- [Editing Information \[page 37\]](#)

- Copying and Deleting Objects [page 41]

2.4.1 Selecting Objects

In the Summary view of the Commissions application, where you can select a single object by clicking on it.

| Position Summary | | | | | | | | | | | View As: | | List | Tree | | | | |
|-------------------------------------|---------------------------|---------------------------|----------------------|--------------------------------------|---------------|-------------|-----------------|--------------|------|--|----------|--|------|------|--|--|--|--|
| | Name | Description | Title | Manager | Business Unit | Participant | Plan | Credit Start | Cred | | | | | | | | | |
| <input checked="" type="checkbox"/> | Sales Rep - East-06 | Sales Rep - East | Sales Representative | Regional Director - East (Robert) | | Mr Walter | NJ Everest Plan | 1/9/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Sales Rep - East-07 | Sales Rep - East | Sales Representative | Regional Director - East (Robert) | | William | NJ Everest Plan | 1/10/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Product Specialist - East | Product Specialist - East | Product Specialist | Regional Director - West (Alexander) | | Alan | NJ Everest Plan | 1/25/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Product Specialist - W... | Product Specialist - W... | Product Specialist | Regional Director - West (Alexander) | | David | NJ Everest Plan | 1/25/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Sales Rep - East-08 | Sales Rep - East | Sales Representative | Regional Director - East (Robert) | | James | NJ Everest Plan | 1/11/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Sales Rep - East-09 | Sales Rep - East | Sales Representative | Regional Director - East (Robert) | | William | NJ Everest Plan | 1/12/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Sales Rep - East-10 | Sales Rep - East | Sales Representative | Regional Director - East (Robert) | | Lewis | NJ Everest Plan | 1/13/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Sales Rep - East-11 | Sales Rep - East | Sales Representative | Regional Director - East (Robert) | | Alexander | NJ Everest Plan | 1/14/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Sales Rep - West-01 | Sales Rep - West | Sales Representative | Regional Director - West (Alexander) | | Morag | NJ Everest Plan | 1/15/2006 | 1/1/ | | | | | | | | | |
| <input type="checkbox"/> | Sales Rep - West-02 | Sales Rep - West | Sales Representative | Regional Director - West (Alexander) | | George | NJ Everest Plan | 1/16/2006 | 1/1/ | | | | | | | | | |

Once you select an object record, you can find the object details in the details view. You can see the total number of objects on the view panel's footer along with the navigation buttons. After you select a record, you can edit, delete, and export as single or multiple objects simultaneously. However, you can select up to 250 objects at a time.

2.4.2 Expanding and Collapsing in Tree View

In the Tree view, use these arrow buttons to expand or collapse Summary view.

- To expand the summary view, click. 
- To collapse the summary view, click. 

2.4.3 Data Validation

Mandatory fields are outlined and marked as required. To save an object, the required fields must be filled with valid entries. If there is an error on the form the fields are outlined and an error message is displayed on top of the form by listing errors in the following conditions:

- Required fields
- Incomplete values
- Incorrect or invalid values

In the Rules workspace, a red outline is also used to indicate that a field value is required for a calculation to run successfully.

2.4.4 Disallowed Special Characters for all Names

The below characters are the standard set of disallowed special characters for names including object and file names:

- ? (question mark)
- & (ampersand)
- ; (semi-colon)
- * (asterisk)
- < (less than)
- > (greater than)
- " (double quote)
- ' (apostrophe) (This is allowed in the participants workspace)

Use of these characters is discouraged in Commissions due to problems in interaction with other products, but Commissions only validates these characters in the following Participant's fields: *First Name*, *Last Name*, and *User Name*. If you enter any of the characters into these fields, an error message is displayed. If you copy text in the process of creating and modifying objects, use an ASCII text editor such as Notepad. Other word processing software packages such as Microsoft Word uses different ASCII values for various fonts and character styles and the value stored in the database might not be the same as the value displayed on the screen.

i Note

& (ampersand) can be used only for User IDs. For example, & (ampersand) can be used only for Participant User ID, but not for Participant First Name, Last Name, and so on.

Exceptions to Name Character Rules

In addition to the disallowed characters, the following character cannot be used in Position group names (due to calculation restrictions):

- , (comma)

Because the following special characters can cause potential access problems while viewing reports, Callidus Cloud discourages their use in Position or Participant names in Commissions as well as in the user IDs created:

- . (period)
- ; (semi-colon)
- / (forward slash)
- \ (backward)
- # (pound)

Disallowed Special Characters for Function Parameters

The following characters cannot be used in Function parameters (strings and literal strings)

- [(left square bracket)
-] (right square bracket)
- ((left parenthesis)
-) (right parenthesis)
- * (asterisk)
- | (pipe)
- ? (question mark)
- + (plus or addition sign)
- \ (backward slash)

Functions affected include:

- Concatenate Two Strings
- Convert String to Date
- Convert String to Upper Case
- Convert String to Value
- Equals (Ignore Case)
- Is Null
- String Contains
- String Ends With
- String Starts With
- Substring Between
- Substring From
- Substring Using Pattern
- Trim String

2.4.5 Editing Information - Overview

If your security role provides with the Update permission to a workspace, you can edit information for those objects in that workspace in the Details view panel. See the Commissions Administrator Help for more information on setting permissions.

Keyboard Shortcuts

- **Tab** - The `Tab` key helps navigation forward within expressions (or form element)
- **Shift + Tab** -The `Shift` + `Tab` combination should bring navigation to the prior field (or expression or form element) on the Form
- **To check/uncheck a checkbox** - press the `Spacebar` key
- **To navigate to radio icon selection** - press the `Up arrow` or `Down arrow` keys
- **For new placeholder in Legal Move** - press the `Enter` key
- **Double click a Formula** - When you double-click a formula in LME, the formula should pop up in the [Manage Versions](#) form. Edits to the formula (name, effective version, logic, etc) will be saved.

Editing a Version of the Object

When you edit an object, you are editing the current version of that object. If you need to edit a different version, click [Manage Version](#) and then select the correct version you want to edit. If the current version of the object should remain the same, you can use the [Create Version](#) option to create a new object with new information.

To edit information, perform the following steps:

1. Search for an object.
2. Click that object in the [Summary](#) view. This displays details of that object in the [Details](#) view panel.
3. Click [Edit Details](#) on the [Details](#) view panel.
4. Make your changes.
5. Click [Save](#).

For more information about editing specific objects, see those specific sections.

Bulk Editing Objects

You can select and edit multiple objects simultaneously. This is commonly referred to as bulk editing. It is disabled if a field is unavailable for bulk edit. For example, you cannot bulk edit the Participant ID for multiple participants. The following procedure discusses two different types of bulk editing

i Note

Edit of Business unit is not supported on any object.

To Bulk Edit Objects in Organization, Classification, Results, and Stage Tables:

1. Search objects for editing.
2. Multi-select objects in the [Summary](#) view panel.
3. Click [Edit icon](#) on the [Summary](#) view.
4. Select the field name to display the value column with the existing value. If multiple records are selected the value displayed as various
5. Review the updates by clicking [Summary](#)
6. Use [Update](#) to save the changes.
7. Click [Acknowledge](#).

Bulk Edit objects in Rule, Rule Elements, and Administration:

1. Search object for editing in any workspace.

2. Multi-select the objects from the *Summary* view.
3. Select the appropriate object and edit the required information in the details panel.
4. Click *Save*.

i Note

For example, to change the base salary for several participants from \$60,000 to \$70,000, you could search for several participants from \$60,000 to \$70,000, you could search for and select all participants earning \$60,000 and update their new and select all participants earning \$60,000 and update their new base salary to \$70,000 in a single step. All changes are reflected in the summary pane. For example, to change the base salary for several participants from \$60,000 to \$70,000, you could search for several participants from \$60,000 to \$70,000, you could search for immediately reflected in the summary pane and select all participants earning \$60,000 and update their new

Viewing and Editing Related Objects

The below feature in Commissions is applicable only for related Formula Object. In workspaces that display the formula, in edit mode, you can double-click the name of the related formula object to bring up the Versions for Object dialog for that object. (This is the same dialog that displays when you use the *Edit Version* button.) From this dialog, you can edit the object as required.

To Edit a Related Formula Object:

1. Navigate to the *Rules* workspace, and select a rule that refers to a formula.
2. Edit the rule. A version dialog opens, that displays details such as name, effective version, legal move expression.

The screenshot shows the 'Edit Versions for Sales Rep - East-06' dialog box. At the top left are buttons for adding (+), deleting (trash), and saving (checkmark). Below these are two date fields: 'Start Date' (1/1/2006) and 'End Date' (End of Time). The main area is divided into sections: 'General Information' and 'Standard Fields'. Under 'General Information', there's a note about the workspace being applicable only for related Formula Object. Under 'Standard Fields', there are four columns of input fields: Name (Sales Rep - East-06), Description (Sales Rep - East), Title (Sales Representative), Manager (Regional Director - East (Robert)); Credit Start (1/1/2006), Plan (NJ Everest Plan), Position Group (NJ Sales Position Group), and Effective End Date (1/1/2020). Other fields include Participant (Mr Walter), Process Start (1/9/2006), Process End (1/1/2020), Last Modified (12/7/2018, 4:02 PM), and Effective Start Date (1/1/2006).

- 3.
4. Make changes as needed.
5. Click *Ok* to save the changes to that object.

Saving or Reverting Your Changes

At any point, you can save your changes to the Commission repository by clicking the [Save](#) button. Prior to saving, you can return the workspace to its pre-edit state by clicking [Cancel](#) option in the details panel. Clicking [Cancel](#) displays a warning dialog. Click [Yes](#) to continue. Click [No](#) to remain in the edit mode.

Changing the Business Unit of an Object

the assignment is disallowed. You can only select business units to which you as a user have been assigned. You also cannot change the business unit of an object if it has associated results. You can, however, create a new version of the object and assign a new business unit to it.

i Note

is assigned to a title, but the EMEA business unit is not assigned. You must have the assign permission to update business units. See the Commissions Administrator Help for more information on setting permissions.

Editing the Business Unit of an Object:

1. Search for an object in the applicable workspace.
2. Select the object in the [Summary](#) view panel.
3. Click [Edit Details](#) in the details panel.
4. Click the [Edit Business Unit\(s\)](#) from the details panel.
The displays the [Change Business Unit for Object](#) dialog.
 - If the new business unit has not changed and the validate button is clicked, "No Change" is displayed, this indicates that a business unit has not been selected.
 - Because you can only assign one business unit to positions and position groups, there is no multiple selections of business units in the Assign or Change the existing business unit drop-down. The business units you select for positions and position groups must belong to the same processing unit. See the Commissions Administrator Help for more information on processing units.
 - If the change is not allowed, the [Change Business Unit for Object](#) window displays the message "No Business Unit interaction exists between selected object and referred by/referring to objects" in "This record" table the column "Change Allowed" displays 'No' and the tables referred to or referred by determining why the change was disallowed. In this case, you cannot save the change; you can only cancel.
 - If the change is allowed, the New Business Unit column displays the new business unit or business units.
5. Select one or more business units from the [Assign or Change](#) the existing business unit drop-down and click [Validate](#).
6. Click [Save](#) if the change is allowed.

2.4.6 Copying and Deleting Objects

You can use the Copy option on the Summary view panel to copy an object or duplicate the same. The Copy option is normally enabled when an object is selected in the summary view panel. You can only copy one object at a time.

To copy an object, perform the following steps:

1. Search for an object.
2. Select that object in the *Summary* view.
3. Click *Copy*.
4. Specify the effective dates for the new object and then click *Ok*. The new object displays with the same name preceded by the words Copy of.
5. Edit the copied information as needed.
6. Click *Save*.

i Note

The Copy icon is not enabled in the *Quotas* and *Lookup Tables* workspaces or in the *Import* views of any workspace.

Deleting Objects

You can delete reference data objects (organization data, classification data, plan data and rule elements) that you have created either manually or through import. For example, if you have just imported or created both participant and a position assignment that references that participant, you can delete the position. In this case, the participant is disassociated from the position before the participant is deleted. In many instances, deleting an object is disallowed. For example, you cannot delete reference data objects that are associated with results data. In instances where deleting an object is disallowed, you can instead end date the object. End dating an object involves changing the end date on the last version of the object to a specific date. After this date, the object is no longer considered active but remains in the Commissions repository.

Deleting an object removes all versions of the object from the Commissions repository. However, the audit log in the *Audit Log* workspace retains information on the actions performed on that object, including its remove (delete) date, and information about the object itself. See Commissions Administrator Help for more information on the audit log.

You can bulk delete items by selecting multiple objects at one time. The maximum number of objects that can be deleted simultaneously is 250.

To delete an object, perform the following steps:

1. Search for an object or objects that you want to delete.
2. Click [Delete](#).
3. Click [Yes](#) to confirm the deletion.

i Note

If the Prompt me before a record is deleted preference is enabled, then the [Are You Sure?](#) confirmation dialog displays.

i Note

If the Prompt me before a record preference is disabled or you disable the *Prompt me before a record is deleted* option in the confirmation dialog earlier in your session, the participant or participants selected are deleted immediately. See the Commissions Administrator Help for information on configuring preferences.

2.5 Overview: Periods, Dates, and Versions

The Effective Date range of a version of an object is determined by the start and end dates of that version. The effective date is used to track which version of an object and its related objects are active in Commissions. Commissions objects tracked by effective date include all reference data (organization data, classification data, plan date, and rule elements). Effective dates are one of three ways that Commissions track objects, the other ways are audit date and calculation run date.

Related Articles

- [Specifying the Effective Dates of a New Object \[page 42\]](#)
- [Viewing the Audit History of an Object \[page 43\]](#)
- [Handling Object Versions \[page 44\]](#)

2.5.1 Specifying the Effective Dates of a New Object

When you create new objects, you are in essence creating the first version of that object. If necessary, you can create new, additional versions of the object. Creating new object versions retains the old versions for auditing purposes. In most workspaces, a [Please Choose an Effective Start and End Date](#) dialog displays when you are creating an object. However, some objects, such as position groups and quotas, are internally effective dated from the beginning of time (BOT) to end of time (EOT), and therefore a [New Effective Start and End Date](#) dialog does not display. The [New Object](#) dialog also does not display for roll types. The BOT constant is 1/1/1900. The EOT constant is 1/1/2200.

For some objects, the *New Effective Start and End Date* dialog contain a calendar field. In general, plan data objects (plans and rules) and most rule element objects (formulas, variables, fixed values, rate tables, and lookup tables) are associated with calendars. Organization data (participants, titles, and positions) and classification data (category hierarchies, categories, and classifiers) are not associated with calendars, and the calendar field is not displayed. See the Commissions Administrator Help for more information on the data that is and is not associated with calendars.

i Note

If you do not specify an effective end date for an object, the effective from date is derived based on the default period and the effective date is set to EOT.

If necessary, select a calendar from the *Calendar* drop-down. The calendar associated with the default period is displayed as the default. Click *OK* to accept this calendar and the default effective dates. The default calendar is the main monthly calendar. The calendar or calendars available depend on whether your commissions administrator has created additional calendars. See the Commissions Administrator Help for more information on calendars. To specify the effective dates of a new object associated with a calendar

To specify new Effective From and Through dates, perform the following:

1. Select a period
 - o You can only select a monthly period that is associated with the calendar selected. For example, if the main monthly calendar was selected, you can only select a month within that calendar.
 - o If the default calendar is set to date, the effective from date defaults based on that date. For example, if the default calendar is set to 01/15/2008, the effective from date defaults to January 2008.
2. Select a period from *Through*.
3. Click *Ok*.

You can only select a monthly period that is associated with the calendar selected or end of time

i Note

If you select a calendar other than the one associated with the default period, the object might not be displayed when you save. Only objects associated with the default period are automatically displayed.

To specify the effective dates of a new object not associated with a calendar. To accept the default effective dates. The effective dates displayed as the defaults are those associated with the default calendar. To specify new effective from and through dates, do one of the following:

4. Select an option
 - o You can select a period that is associated with the current default period calendar or you can use *Select a date*.
5. Select an option from the *Through*.
6. You can select a period that is associated with the current default period calendar, use *Select a date*, or select *End Of Time*.
7. Click *Ok*.

2.5.2 Viewing the Audit History of an Object

You can view the history of changes made to an object over time. Objects that are tracked by audit history have an *Audit the selected object* icon in their workspaces. You cannot view changes to quota values or lookup table

values using Audit History from the Quotas and Lookup Tables workspaces. To view changes to these values, use the [Audit Log](#) workspace. See the Commissions Administrator Help for more information on audit history and auditable objects.

To view an object's audit history, perform the following steps:

1. Select an object from summary view from a workspace where the audit history is tracked for that object.
2. Click [Audit](#).
3. Click [Ok](#) to close the window.

You can also use the [Audit Log](#) workspace to track additions, modifications, and deletions of SAP Commissions objects. The [Audit Log](#) also records when each user logs in or out of SAP Commissions.

2.5.3 Object Versions Overview

In this workspace, you can create new versions and edit existing versions using the [Manage Version](#) option for most effective dated objects.

i Note

Because versions are handled differently for position groups, relationships, quotas, and lookup tables, these workspaces do not have the [Manage Version](#) icon. Also, period-based fixed values also do not have the version icon.

Creating a New Version of an Object

You should create a new version of an object if the change you are making is newly effective and effective over a span of time. Creating a new version also retains the old versions for auditing purposes. Retaining the old versions makes it possible to track what version was effective at a particular point in time. For example, if a participant's salary changes, you would create a new version that reflects this change, but keep the old version showing the participant's previous salary. You can create a new version by using the [Manage Version](#) icon in summary view panel. If you are in the [Edit Versions](#) window, you can also create a new version by clicking the [Create version](#) option.

i Note

If you have multiple versions of an object and you need to have just one version that replaces some or all of those multiple versions, for performance reasons it is faster to create a new version with the new effective date range. This is compared to editing an existing version of the object such that you extend the date range of that existing version.

Follow these steps in creating a new version of an object:

1. Search for an object for which you want to create a new version.

2. Select that object in the *Summary* view panel.
3. Click *Manage Version* to display the *Edit Versions* dialog.
4. Click *Add* to create a new version.
 - If the default period is set to a period, the effective from date defaults based on that period, and the through date defaults to end of time. For example, if the default period is set to January 2008, the effective from date defaults to January 2008 and the through date default
 - If the default period is set to a date, the effective from date defaults based on that date. For example, if the default period is set to 01/15/2008, the Effective From date defaults to January 2008. If the object is calendar based and the default date is outside the calendar, the Effective From date is blank and must be specified. The through date defaults to end of time.
5. Enter effective dates for the new version using one of the following methods:
 - Enter and select an option from the effective From auto search drop-down. If the object you are creating a new version for is associated with a calendar, you can only select a period that is associated with that calendar. If the object you are creating a new version for is not associated with a calendar, you can select a period that is associated with the default calendar or use select a date to specify a date.
 - Select an option from the through auto search drop-down. If the object you are creating a new version for is associated with a calendar, you can only select a period that is associated with that calendar or select end of time. If the object you are creating a new version for is not associated with a calendar, you can select a period that is associated with the Default Calendar, use Select a date to specify a date or select end of time.
6. Click *Ok* to close the *Create New Version* dialog.
7. Click *Save* to save the new version. The version must be saved before you can make changes to it.
 - If the new version of the object is effective in the default period, the new version displays in the workspace detail area. You can make changes to this new version. If your default period is outside the bounds of the new version, the new version is not automatically displayed in the workspace detail view after saving the new version. You must either change your default period or open the *Versions for the Object* dialog to view the new version.

i Note

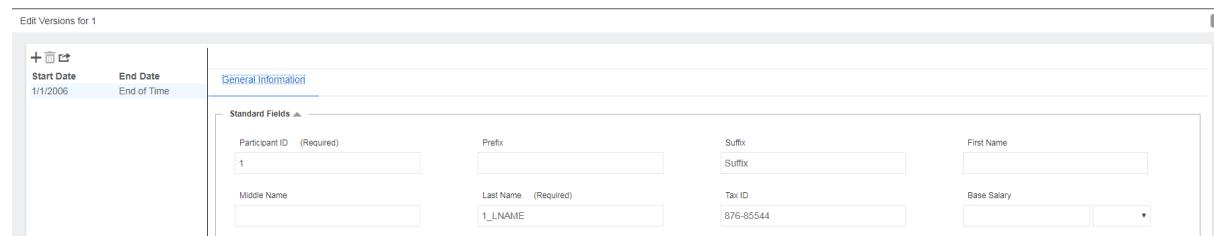
A new version of an object is created if you change the effective dates of an existing version of the object. Ensure that items that refer to the object are still valid if you expand or reduce the effective range of an object version. For example, a plan with an effective range from January 1999 to December 2005 can be expanded to create a new version from January 2006 to end of time. Referring objects effective from January 2001 to December 2004 are not valid for this new version.

Editing a Version of an Object

You should edit the current version of an object if you need to make a change to only that version. For example, if you need to update a participant's current salary, you would edit the current version of the participant object. However, if you need to make changes to a version of an object other than the current version, you can simply enter the information into respective fields and click *OK* to save the changes. The *Versions for the Object* dialog contains an effective date versions area at the top. All the tabs that are accessible for the original object are also accessible from this dialog. By default, the version related to the default period is displayed. The *Versions for the Object* dialog and the effective from date is highlighted.

The list of versions in the summary pane on the left allows selection of a particular version. The currently selected version is highlighted in blue, while the non-selected versions are not shown in color. Details related to

the selected version reflect in the details pane on the right. To select a different version, click the version in the summary pane. The effective from and through dates for the selected version is displayed in the drop-down boxes below the effective date timeline. The following illustrates a single version compared to multiple versions in the Versions for Object dialog.



The following image illustrates multiple versions in the Versions for Object dialog.

i Note

You cannot change object attributes over multiple versions that are part of the object's logical key (the logical key is what defines the object as unique from other objects of the same type). For example, to change a participant's ID over multiple versions, you have to change the ID on each effective version individually because the ID is part of the participant's logical key. Change the information for the selected version or versions. For example, if there was a spelling error in a participant's name, you would edit the version or versions that contain the erroneous information.

End Dating an Object

If you have an object that is no longer active but cannot be deleted, you can change the effective end date of the last version of that object to a specific date. For example, if you have a now obsolete position that was effective from January 1999 to EOT and that position has resulted from January 1999 to August 2007, you cannot delete the position but you can end date it by doing the following:

- In the [Versions for Object](#) (Manage version window), end date the position by changing the effective end date of the last position version to August 2007.
- In the [New Version](#) dialog, create a new version of this position from September 2007 to EOT and assign a different or null position.

In most cases, end dating an object is preferable to deleting it. End-dated versions are not processed by the user interface or calculation in later periods. The following rules apply to end dating participants and positions:

- If a participant or position has non-zero results data, you cannot end date the participant or position.
- You can end date a position or participant version if there are no results data associated with that version.
- If the credit start, credit end, process start and process end fields on a position version that is end dated extend beyond the effective end date of that version, the position continues to be processed and/or receive credits and payments.
- If you end date a position or participant and that have associated zero-value results data, these results data objects display with a position of <unavailable> in Commissions.

To end date an object, perform the following steps:

1. Search for the object or objects to be end-dated in any workspace.
2. Select the object to be end-dated in the *Summary View* panel of the workspace.
3. Click *Manage Version* to display the versions for the *Object*.
4. Navigate to it using the single and double scroll arrows if the last version of the object is not displayed, and then select it by clicking the bar in the *Effective Date Versions* timeline.
5. Specify the end date using the *Select a date option* in the *Effective through (Effective End date)* field.
6. Click *Ok* to save your changes and close the *Versions for the Object* dialog.

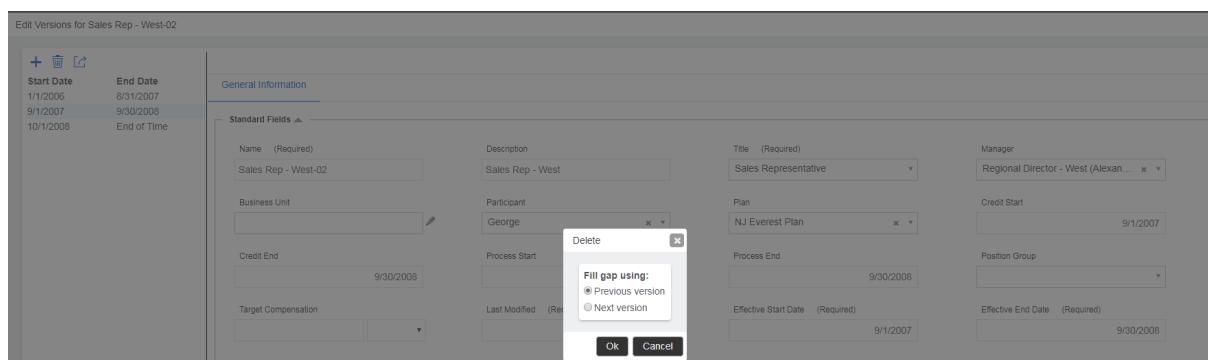
Deleting a Version of an Object

You can also delete a version of an object using the *Versions for Manage Version* window (Manage Version window). If deleting a version would create a gap between versions, you are given the option to fill the gap using the previous or next version.

To delete a version of an object:

1. Search for the object in any workspace.
2. Select the object in the *Summary* view panel of the workspace.
3. Click *Manage Version* to display the versions of the *Object* in the *Edit Versions* window.
4. Select a version from the *Start Date* and *End Date* timeline
5. Click *Delete* to delete the version.

The *Delete Version* dialog displays if deleting a version would create a gap between versions.



In this dialog, perform the following:

- Select either previous version or next version to indicate how Commissions should fill in the timeline gap. If you select previous, the effective date of the version being deleted becomes effective through the date of the previous version. If you select next, the effective from the date of the version being deleted becomes effective from the date of the next version.
- Click *OK* to close the *Delete Version* dialog.

1. Click **Ok** to save your changes and close the *Versions for Object* dialog.

Bulk Edit of Versions

In the *Manage Version* window, you can select multiple versions holding **[Ctrl]** button and edit the enabled fields. Click **OK**.

The edited files updates in the *Summary*, *Details* panels and the *Manage Versions* window.

This is currently implemented in the following workspaces:

- Participant
- Position
- Title
- Category
- Generic Classifier
- Product
- Customer
- Postal Code
- Fixed Value
- Variable

3 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 Advanced Search in stage tables workspaces, you can find record imported into the staging tables of a workspace.
- Using Related Search, you can research the associations between data

Advanced Search

Step 1: Choose a Saved Search or Define a New One Below

Step 2: Define Search Criteria

Advanced Mode

Choose Business Unit (optional):

| Field Name | Comparison | Value | |
|----------------|------------|-------|-----------------|
| Participant ID | equals | | + Add Criterion |

Step 3: Define Sort Criteria

| Field Name | Order | |
|------------|-----------|--------------------|
| Last Name | Ascending | - Remove Criterion |
| First Name | Ascending | + Add Criterion |

Step 4: Click Apply Search Criteria

Cancel **Reset** **Apply Search** **Save Search**

Related Articles

- [Common Search Features \[page 50\]](#)
- [Search Tips \[page 51\]](#)
- [Simple Search \[page 52\]](#)
- [Advanced Search \[page 52\]](#)
- [Advanced Mode \[page 57\]](#)
- [Saved Searches \[page 59\]](#)
- [Related Search \[page 61\]](#)

3.1 Common Search Features

Search Box

In the *Advanced Search* action panel, you find *Search*, *Reset*, *Cancel*, *Save*, and *Manage*. The following table provides more information about each of these features. The search for the *Related Objects* action panel is similar, however, it does not include the *Save* and *Manage*.

| Icons | Operation |
|--------------------|--|
| Search | Retrieves search results. Use the icon drop-down menu to switch between the simple search and advanced search. |
| Reset | Clears the search dialog. |
| Cancel | Closes the dialog. |
| Save Query | Saves the search with a name. |
| Apply Search Terms | Applies the search terms entered |

Search Criteria Area

The search criteria area for *Advanced Search* dialogs differs because the advanced search can be used to build complex queries across database tables. The *Combine with Multiple Criteria* option is not included in *Advanced Search* because combining criteria can be directly entered in the query expression itself. The *Search for Related Objects* dialog can be displayed in either simple search or advanced search format and follows the rules for those dialogs. The following features and options are specific to the search criteria area:

- Current Period Default - In the results data workspaces (*Credits*, *Measurements*, *Incentives*, *Commissions*, *Deposits*, and *Payments* workspaces), the period associated with the default period automatically becomes part of the search criteria. For example, if your default period is January 2008, when you perform a simple search in the *Credits* workspace, Period = January 2008 is included as part of your criteria. When you perform an advanced search in the *Credits* workspace, Credit Period = January 2008 is included as part of your criteria. If you are performing a related search from a workspace to the *Credits* workspace, either Period = January 2008 or Credit. Period = January 2008 is defaulted depending on whether the related search is in advance search format. You cannot remove this period criteria; however, you can change it.
- Combine multiple criteria with - If multiple criteria are specified, you use the *AND* or *OR* options to join them. If *AND* is specified, all search criteria must be met. If *OR* is specified, at least one of the search criteria must be met.
- Ignore case in text fields - If your search criteria include a text field, enabling this option returns results regardless of capitalization.

For example, if you are searching in the *Positions* workspace for all positions names that begin with the letter A, your search criteria would be either Name Like A% or Name = A*. If you enable this option and there are three positions that meet this criterion (Account Manager, Account Executive, and account rep), capitalization is

ignored and all three names are displayed (with names beginning with lowercase letters at the bottom). If you disable Ignore Case, only those results that begin with capital letters (Account Manager and Account Executive) are displayed.

Sort and Filter Options Area

The sort and filter options are the same in advanced search. The following features and options are specific to the sort and filter options:

- If your sort priority/sort order includes a field that can contain null data, such as description, the objects without descriptions display at the bottom when using an Oracle database.
- Filter by business units - If your organization has created and implemented business units, you can use this option to display only those objects that are associated with one or more business units. To specify just one business unit, select the business unit from the drop-down.
- You can only select a business unit to which you have been assigned.

See the Commissions Administrator Help for more information about business units.

- If you are searching for results data (commissions, deposits, payments, incentives, measurements, and credits) or transaction data (transactions and orders) the following two options might be available depending on your preference settings. See the Commissions Administrator Help for information on configuring preferences.
- Filter by processing unit - If the the *Enable Processing Units* calculation preference is enabled, the *Filter by Processing Units* drop-down is displayed and a selection is required. You can use this option to limit your search to results associated with one or more processing units or results not associated with a processing unit (<Unassigned>).

3.2 Search Tips

Commissions searches can retrieve large result sets. There are several steps that can be taken to reduce the result sets and the time taken to perform searches.

Multiple Searches

If your search criteria in workspaces are broad and likely to produce a large result set, you can start a search in one workspace, navigate to another, begin another search, then navigate back to the original workspace to see your search results. The *Search Result Limit* general preference determines the maximum number of records that Commissions returns. See the Commissions Administrator Help for information on configuring preferences.

Cancel Search

If a search takes more than few seconds, which might happen if the Search Result Limit preference is set to a high number, Commissions displays a spinning clock while the data is being retrieved from the Commissions repository. See the Commissions Administrator Help for information on configuring preferences. You can right-click the workspace icon to display the *Cancel Search* icon. You can then left click this icon to cancel the search.

3.3 Simple Search

You can access a quick word-based search from most of the workspaces in the Commissions application.



3.4 Advanced Search Overview

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. For example, if a search is launched from the Relationships workspace, only those fields applicable to searching Relationships are displayed. *Advanced Search* is available in all workspaces except the *Calendars* and *Customization* workspaces. As in the *Advanced Search* and *Search for Related Object* dialogs, you can also specify additional sort and filter options.

Advanced Search

Step 1: Choose a Saved Search or Define a New One Below

Step 2: Define Search Criteria

Advanced Mode

Choose Business Unit (optional):

| Field Name | Comparison | Value | + Add Criterion |
|----------------|------------|-------|-----------------|
| Participant ID | equals | | |

Step 3: Define Sort Criteria

| Field Name | Order | - Remove Criterion |
|------------|-----------|--------------------|
| Last Name | Ascending | - Remove Criterion |
| First Name | Ascending | + Add Criterion |

Step 4: Click Apply Search Criteria

Cancel **Reset** **Apply Search** **Save Search**

i Note

In general, only fields specific to the core database table are accessible using [Advanced Search](#). If two or more tables must be logically joined to perform a search, you must use Advanced Search. For example, you can search directly for transaction information, but a search for payees or positions related to a transaction requires a join and [Advanced Search](#) must be used.

Comparison Operators

The comparison operators that are available for building your search are dependent on the field specified. For example, the operators available for a text field differ from those for a numeric or date field. The operators for the various data types are listed in the following table.

| Operators | String (var char) | Number | Date | Boolean |
|------------------|-------------------|--------|------|---------|
| < (less than) | yes | yes | yes | n/a |
| > (greater than) | yes | yes | yes | |
| = (equal to) | yes | yes | yes | yes |

| Operators | String (var char) | Number | Date | Boolean |
|----------------------------|-------------------|--------|------|---------|
| <> (not equal to) | yes | yes | yes | yes |
| <= (less than or equal) | yes | yes | yes | n/a |
| >= (greater than or equal) | yes | yes | yes | n/a |
| Contains | yes | n/a | n/a | n/a |
| Not Contains | yes | n/a | n/a | n/a |
| Between | n/a | n/a | yes | n/a |
| Empty | yes | yes | n/a | n/a |

In addition to the listed operators, the `in` operator in [Advanced Search](#) allows you to search for results data (credits, measurements, incentives, commissions, deposits, and payments) that are not specific to a leaf-level period. For example, if your calendar includes decades, years, quarters, and months, it is possible to find all credits for a specific quarter or year. You do not need to search at the leaf-level, in this case, month.

Guidelines for Using Comparison Operators

Use these guidelines when constructing [Advanced Search](#) to search for dates and nullable fields:

- When you use the equal to the `=` operator to search for a date, the values on each side of the operator must be exactly the same. In some cases, you cannot ensure that the values are the same. For example, some numbers could be rounded off internally by the system so that there is no match. In these cases, use greater than `>` or less than `<` instead of equal to `(=)`. For example, instead of using the criteria Start Date `= 1/1/2008`, use Start Date `>= 1/1/2008 AND Start Date < 1/2/2008`.
- The `Is Empty` and `Is not empty` is available for nullable fields only. It is not available for fields that are required in a workspace. For example, if you are doing a search by title name, a required field, `Empty` is not available.

Wildcard Operators

Commissions only supports wildcards in the trailing position, so you need to build search strings ending with a wildcard (`string*` or `string*string*`) rather than beginning with a wildcard (`*string` or `*string*string`). Use the asterisk* wildcard with comparison and equals operators, and the percent sign % wildcard with the `Contains` and `Not Contains` operators. In general, % and * wildcards can be used in string searches using the following guidelines:

- When using the `Contains` and `Not Contains` operators, you can use t % operator using the format string `%string%`. For example, a last name search on the value M%t% returns results for all last names that contain both M and t, such as Mitchell.

- When using the equal (=) and not equal (<>) operators, you can use the * (asterisk) in the format string*string*. For example, a last name search on the value M*t* also returns results for all last names that contain both M and t, such as Mitchell.

Caution

Your database can impact the ability to search for strings that contain special characters because your queries must be translated into SQL. Consult your database documentation to determine what restrictions apply. Do not use either of the wildcard operators without qualifying string text. For example, you should not use just an asterisk (*) or a percent sign in your searches. Using wildcards without qualifying string text results in poor search performance

Note

In Advanced Search, you do not need to enclose strings in quotes, but in Advanced Search (Advanced mode) it is required.

Advanced Search Example

For example, to specify the criteria to find all participants with a salary greater than \$500,000, you would:

- Select “Base Salary” in the Field Name drop-down
- Select “greater than” in the Comparison drop-down
- Enter “500,000” in the Value field
- Click the Unit Type field icon in the “Value” field and select “USD” to indicate dollars

The screenshot shows the Advanced Search interface with four main sections:

- Step 1: Choose a Saved Search or Define a New One Below**: Contains a dropdown menu labeled "Select saved search".
- Step 2: Define Filter Criteria**: Contains fields for "Field Name" (Base Salary), "Comparison" (greater than), "Value" (\$500,000.00), and "Unit" (USD). It also includes "Advanced Mode" and "Include" options (All Search Terms, Any Search Terms, Ignore Case In Text Fields).
- Step 3: Define Sort Criteria**: Contains fields for "Field Name" (Last Name, First Name), "Order" (Ascending), and "Remove Sort" and "+ Add Sort" buttons.
- Step 4: Click Apply Search Terms**: Contains buttons for "Cancel", "Reset", "Apply Search Terms", and "Save Query".

Performing Advanced Search

You can include one or more of the available fields for a workspace in your Advanced search. If generic attributes are available and enabled for the workspace, you can also use them in your search criteria.

To search for information using Advanced Search:

1. Click *Advanced Search* when the view is set to *List View* or *View As List*.

If you are performing a search in a results data workspace (*Credits*, *Measurements*, *Incentives*, *Commissions*, *Deposits*, or *Payments* workspaces), the period associated with the default period automatically becomes part of the search criteria.

1. (Optional) Select either *New Search* or the name of a search you saved previously in the *Current Search* drop-down.
2. Specify one or more criteria by doing the following in the search criteria area:
 - Select a field name. The fields available are dependent on the workspace.
 - Select a comparison operator. The comparison operators available are dependent on the field selected.
 - Specify a Value for the comparison. If a numeric field value is selected, in most cases you must click the Unit Type field icon to select a unit type. However, if the value has a predefined unit type—such as the transaction Discount (%), transaction num units (quantity), and transaction value (currency) fields—or is an integer, the unit type field icon is not displayed.

As you enter additional search criteria , new blank fields display to accommodate additional entries and to remove click '- Remove Criteria'.

1. (Optional) Specify sort and filter options.
2. Click *Apply Search Terms*.

When the search is complete, the search results display in the summary pane of the workspace. If no results are found, the message *No Records Found* is displayed.

i Note

Most unit types, such as USD (US dollars) produce an exact match. If you search for Unit Value > \$100, only dollar values greater than \$100 are retrieved. However, when you specify the integer unit type, values of all unit types are retrieved. For example, if you search for Unit Value > 100 (unit type = integer), all values greater than 100, such as \$100 (dollars) and £100 (British pounds), are retrieved.

Retrieving All Information Using Search

If the workspace does not have a default search option then the *Summary* and *Detail* view are blank when you first enter the workspace on a particular tab. Commissions populates the workspace with the results of the search. The search is restricted to the default calendar.

To retrieve information from the workspace:

1. Click [Advanced Search](#).
2. Click [Apply Search Terms](#) without entering any search criteria.

i Note

If you get the message *No Records Found* when searching in the *Payments* workspace, follow the message instructions to enable the [Generate Payment Summary](#) options(payment summary settings). See the Commissions Administrator Help for more information on these options.

3.5 Advanced Mode Overview

Advanced Mode uses SQL-like syntax to form a search. Use Advanced Mode to perform a search that requires that two or more tables must be logically joined. As with Advanced Mode, the field names available for the search are based on the workspace. For example, if a search is launched from the Transactions workspace, only those fields applicable to searching transactions are displayed. Some of the elements in Advanced Mode, as shown in the image below, features found in the Formulas workspace. For example, as you enter information in the edit pane and select from the Legal Moves pane, information is validated.



As you build your search expressions, selected literals are displayed in blue text and selected data fields are displayed in black text in the Edit pane. As in the Advanced Mode and Search for Related Objects , you can also specify additional sort and filter options.

Advanced Mode Syntax

In the Edit pane, use the following syntax to enter search criteria:

- To represent field names (such as Participant.Last), double-click the literals and field names displayed in the table, or type an asterisk (*) and select from a list of possible field names.
- To enter comparison operators, type an asterisk and select from a list of operators.
- To enter currency amounts, type the number with no format (for example, 10000) and then select from the list of currency types that displays (for example, USD). Commissions formats the amount for you.

To enter strings, either:

- Enclose the string in double quotes; for example, "Burke"
- Use the asterisk as a wildcard character; for example, "B*"
- To search for a null value, enter null without double quotes, for example, Participant.Positions.Name = null

Use Advanced Search to search across objects or perform complex logic. For example, the following search finds all Participants that report to VPs: Participant.Positions.Manager.Title.Name = "VP" You can get the same results by navigating the workspaces as follows:

- Go to the Titles workspace
- Search for all titles whose name = "VP"
- Find related positions
- Find related subordinates
- Find related participants

This second example finds all Manager credits greater than \$1000, plus all VP credits:

(Credit.Value > \$1000 and Credit.Position.title = "Manager") or Credit.Position.Title = "VP"

Performing Advanced Search

Select Advanced Search link in the summary view panel. Advanced search is available from the ListView in most workspaces and either the table or tree view in the Transactions, Credits, and Deposits workspaces.

To search for information using Advanced Search:

1. Click [Advanced Search](#) From the list view of most workspaces. This opens Advanced Search dialog.
2. (Optional) select either New Search or the name of a previously saved search in the Current Search drop-down.
3. Specify one or more criteria by selecting Data Field from the Legal Moves pane, entering operators, and selecting or entering values. If the data field selected is a numeric field, you must click the Unit Type field icon to select a unit type.
4. (Optional) Specify sort and filter options that are **Define Sort Criteria**.
5. Click [Apply Search Terms](#).

After your search, if no results found then the No Records Found message is displayed in the summary pane of the workspace.

i Note

Most unit types, such as USD (US dollars) produce an exact match. If you search for Unit Value > \$100, only dollar values greater than \$100 are retrieved. However, when you specify the integer unit type, values of all unit types are retrieved. For example, if you search for Unit Value > 100 (unit type = integer), all values greater than 100, such as \$100 (dollars) and £100 (British pounds), are retrieved. The fields available are dependent on the workspace. For example, if the search is launched from the Commission workspace (as shown previously), fields applicable to searching for commissions are visible. If Generic Attributes are enabled, you can use them in your search criteria.

3.6 Saving a Search

When you perform a search, you can save your query so you can quickly re-run it later. You can either save a search with the search criteria fully entered, or save the search to be used as a template by saving the criteria without entering the actual values.

To save a search, perform the following steps:

1. Perform a search in *Advanced Search*.
2. Click *Save Query*.
3. Enter a name for the search in the *Name* field of the *Save Query* dialog.
4. In the *Description* field, you can optionally enter a description for the search, such as Hires after 12/31/2007" or "Products that Cost More Than 50K".

Step 5: Save Query

The screenshot shows a 'Save Query' dialog box. At the top left is a 'Type:' label with a dropdown menu containing the word 'Public'. Below it is a 'Name:' label with an empty input field. To the right of the 'Name:' field is a larger 'Description:' label with an empty text area. At the bottom are two buttons: a grey 'Save' button on the left and a blue 'Close' button on the right.

5. Select one of the following in the *Type* drop-down:
 - **Public**—All users who have access to the workspace can use the search.
 - **Personal**—Only the user who created the search has access to it.
6. (Optional) Check *Make Default* to have Commissions execute this search every time you access the associated workspace.
7. Click *Save*.

Commissions saves the search with the specified name and the search displays in the *Search Name* pane. You can later choose this search from the *Current Search* drop-down in the *Advanced Search* dialog.

Using a Saved Search

To use a saved search from the *Advanced Search* window, please follow these steps mentioned below .

1. Go to [Choose a Saved Search or Define a New One Below](#) a pre-populated search field.
2. Enter a search string or at least a character
3. Select the search from the displayed list.
4. Click [Apply Search Terms](#) to execute the search.

Deleting a Saved Query

You can delete your personal searches and public searches from the [Advanced Search](#) page.

To delete a search:

1. Search and select the saved search to be deleted in the [Advanced Search](#).
1. Click [Delete Query](#). This results in a confirm message “Are you sure you want to delete the query below?”
2. Click [Delete](#)

Setting Up a Default Search for Workspace

You can set up Commissions to execute a saved search every time you access the associated workspace. After creating a search in [Advanced Search](#), make sure you save it using the [Save Query](#) button. If a search had previously been set, the new search replaces it as the default.

To set up a default search for a workspace from the Save Search Dialog:

1. Enter the search string or saved query into the pre-populated search field and select the same
2. Enable the slider once selected.

Advanced Search

Step 1: Choose a Saved Search or Define a New One Below

Select saved search

Please enter 1 or more character

- Default text enclosed within parentheses next to a search indicates that the search has been set as a default search.

3.7 Related Search Overview

In some workspaces, the *Related Search* view enables you to find information related to the objects selected in the summary pane. For example, you can quickly retrieve the related positions assigned to a plan, including those assigned by title. The image below shows the search for the *Related Search* dialog in summary view.

In Advanced Search, you can also specify additional sort and filter options.

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, refer to the specific section.

To find related information:

1. Search for an object or objects From any workspace.
2. Select an object or objects in the *Summary* panel.
3. Go to *Related Search*, click any object from the listed options or click *Advanced Related Search* next to the object link
 - Clicking the link displays search results for that object for the default period.
 - In most workspaces and for most objects, clicking the *Advanced Related Search* icon displays the *Search For Related Objects* dialog in advanced search format and the name of the selected object is substituted for the object name.

However, when doing related searches from some workspaces and for some objects, SAP Commissions does not display the *Search For Related Object* dialog. Instead, the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message *No Records Found* is displayed. Click *OK* to close the message dialog. You are returned to the workspace from which the related query was executed.

1. Specify one or more criteria in the search criteria area.
2. Click *OK*

If results are found, opens the workspace for the selected object, and the objects related to the selected object or objects are displayed. You can use the *Cancel* icon to return to the previous workspace. If no results are found, the message *No Records Found* is displayed. Click *OK* to close the message dialog. You are returned to the workspace from which the related query was executed.

4 Organization Data Overview

Learn about SAP Commissions organizational units, their functionalities and relationships between them.

Organization data includes participants, titles, positions, position groups, and relationships. In SAP Commissions, organization data:

- Identifies the personnel, called participants or payees, who are paid.
- Associates participants with a position, and more indirectly, a title.
- Associates position assignments with specific compensation plans.
- Identifies effective dates of employment, position assignment, and termination.
- Specifies roll relationships — relationships that define who can receive indirect (rolled) credits for transactions from related positions.
- Specifies the reporting structure, a mirrored representation of your human resources (HR) organization chart that shows how each of the positions in the company is related to a position hierarchy of your organization structure.

As your company's organization changes over time, you must change your organization data to accommodate changes. For example, you might need to add or remove participants, create new positions, or change your reporting structure when people transfer within departments, get promoted or leave the company. SAP Commissions provides a workspace in which you can create, edit, copy, and delete each kind of organization data. You can also import data for participants, positions, titles, and relationships instead of manually entering this data. You cannot import data for position groups.

Related Articles

- [About Participants \[page 62\]](#)
- [About Titles \[page 68\]](#)
- [About Positions \[page 70\]](#)
- [About Position Assignments \[page 83\]](#)

4.1 Participants Overview

Person or organization participating in your variable compensation program. Also called payee. A participant can be either an internal employee or an external company, such as a dealer. As your organization changes, you can modify your participant's information. At the same time, you can also import participants information.

Participants Workspace

The details view panel of the space displays as an untabbed workspace if neither custom attributes nor reporting attributes have been enabled for participants. However, if either or both have been enabled, a *General Information* tab is displayed. The following figure shows the participants workspace with the *General Information* tab displayed.

The screenshot shows the Participants workspace with the General Information tab selected. At the top, there is a toolbar with various icons for search, filter, and navigation. Below the toolbar is a participant summary grid displaying 31 entries. The columns include Participant ID, Prefix, Suffix, First Name, Middle Name, Last Name, Tax ID, Base Salary, Hire Date, and Term. The first entry in the grid is checked. Below the grid, there are buttons for 'Show' and 'entries', and a page navigation bar showing pages 1 through 4. The main content area below the grid contains tabs for 'Participant Details' and 'General Information'. Under 'General Information', there is a section for 'Standard Fields' with fields for Participant ID (Required), Prefix, Suffix, and First Name, all of which are currently empty.

The display name format for participants can be configured. See the Commissions Administrator Help for more information.

Creating a Participant

Use the participant's workspace to create participant information.

To create a participant:

1. Click *Participants* from the *Organization* menu.
2. Click *Add*. The *New Effective Start and End Date* dialog displays.
3. Specify the effective dates for the new participant, and then click *OK*.
 - An empty row displays in the *Position Summary* and empty *Standard* and *Custom* fields in the *General Information* section of the *Position Details* panel.
4. Enter the participant's ID. The participant's Id should be a unique sequence of numbers and or characters that identifies the participant. This number (for example, an employee number) is often used to identify the participant in other external customer systems.
5. If your organization has created and implemented business units, you can assign this participant to one or more business units by selecting from the *Business Units* drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.

6. Finish creating the participant by entering the information indicated in the following table.

| Field | Description |
|--------------------|---|
| Name: Prefix | A prefix such as "Mr." or "Ms." |
| Name: First | The participant's first name. Note: If you don't check <i>Ignore Case</i> , participant names sort differently if they are not capitalized. |
| Name: Middle | The participant's middle name or initial. |
| Name: Last | The participant's last name; if you're specifying a company as a participant, put the company name here. Note: If you do not check <i>Ignore Case</i> , participant names sort differently if they aren't capitalized. |
| Name: Suffix | A suffix such as "Jr" or "PhD." |
| User Name | The user ID the participant uses to log in to Commissions. |
| E-mail | The participant's email address. The email address is now extended to 100 characters. |
| Preferred Language | Set the preferred language for the participant. System documents, distributions and notifications will be sent in the selected language. |
| Tax ID | An identifying number, usually provided by human resources. For example, some companies enter the participant's social security number. |
| Base Salary | Usually the base, non-variable portion of the participant's salary. If you have more than one base unit type for currency, the <i>Unit Type</i> field icon is displayed so you can select a currency. See the Commissions Administrator Help for more information on unit types. On-target earnings (OTE) is calculated using this base salary and the target compensation provided in the Positions workspace. The base salary, if specified, displays in the <i>Participant Plan</i> summary. |

| Field | Description |
|----------------|--|
| Hired | <p>(Optional) The date the participant first began working at your company. You can enter a date or select a date using the Calendar icon.</p> <p>The hire date is the first date when a participant is eligible for assignment to a position. It is not the date that compensation processing begins for this employee. Processing dates are assigned to position assignments.</p> <p>This date is not used in the calculation of compensation.</p> |
| Terminated | <p>(Optional) The last date the participant worked at your company. You can enter a date or select a date using the Calendar icon.</p> <p>This date is not used in the calculation of compensation.</p> |
| Event Calendar | Select the event calendar for participants. If no calendar is selected, the participant inherits the Default event calendar which is set in > Preferences > System Preferences > Communicator Configuration > Choose Default Event Calendar . |

If your SAP Commissions dministrator has enabled custom attributes for participants, then a custom fields section is also displayed within the participant's details view panel and to configure these fields you have to click or launch Configure Detail View window.

7. Click [Save](#).

Modifying a Participant

You can modify most of the information for a participant including the participant's business unit. In addition to the update permission for participants, you must also have the update permission for participant name and participant terminate to modify the participant's name or he terminated date. Similarly, to modify the participant's base salary and Tax ID number, you must have update permissions for Private Data in addition to update permission for Participants. See the Commissions Administrator Help for more information on setting permissions

i Note

If the version of the participant that must be modified is not currently displayed, select the current version and click Manage version on the toolbar to open the [Versions for Object](#).

To modify participant information:

1. Click [Participants](#) from the [Organization](#) menu.
2. Search for the participant or participants that you want to modify from the [Participant](#) summary.
3. Click [Edit Details](#), on the details panel, to modify. You can find the [Edit Details](#) icon on the details panel.
4. If your SAP Commissions administrator has enabled custom attributes for participants, then a custom fields section is also displayed within the [Participant's details](#) view panel and to configure these fields you have to click or launch [Configure Detail View](#) window.
5. Click [Save](#).

i Note

If you are searching for a participant occupying a particular position, use Advanced mode in Advanced Search and type the Participant.Positions.Name data field. For example, to find all Participants who occupy positions that have names beginning with the word Sales, you would specify the query Participant.Positions.Name = "Sales*???. You can also use Advanced Mode in Advanced search to find only those Participants who have not yet been assigned to positions using the query Participant.Positions.Name = null.

Terminating a Participant

When a participant leaves your organization, you can terminate that participant. Terminating a participant involves setting the terminated date on a version of the object, normally the latest version. Adding a terminated date to one version adds it to all versions. Terminating a participant does not affect calculation processing for that participant. Compensation for the participant continues to be processed. This is useful, for example, when the participant should continue to receive credit and compensation for sales made before the termination date and receive compensation for items such as yearly bonuses. However, if compensation for the participant should no longer be processed or only processed up to a certain date, you must change the Credit start, Credit end, Process start, Process end dates of the participant's position assignment accordingly. If the participant is no longer considered active but should remain in the Commissions, the participant can be end dated. This involves setting the end date on the last version of the object to a specific date.

To terminate one or more Participants perform the following steps:

1. Click [Participants](#) from the [Organization](#) menu.
2. Search and select the Participant or Participants that you want to terminate from the [Participants Summary](#) panel.
3. Click [Edit Details](#).
4. Set the [Termination Date](#).
5. Click [Save](#).

i Note

The [Terminated](#) field is provided in accordance with your human resources system, which determines how the last date of a participant is recorded at your company.

Finding Objects Related to Participants

You can find data related to one or more Participants by selecting the appropriate object option from the Related Search pane. The available options and the data returned are as follows:

- **Positions**—returns the positions referring to the selected participant.
- **Credits**—returns the credits allocated to the selected participant.
- **Measurements**—returns measurements referring to the selected participant.
- **Commissions**—returns the commissions referring to the selected participant.
- **Incentives**—returns incentives referring to the selected participant.
- **Deposits**—returns deposits referring to the selected participant.
- **Payments**—returns the payments referring to the selected participant.
- **Titles**—returns the titles referring to the selected participant
- **Distributions Tracking**—returns the distribution track referring to the selected participant

To find objects related to Participants:

1. Click *Participants* from the *Organization* menu.
2. Search for the participant or participants to whom you want to find the related objects.
3. Select the participant or participants from the *Participants Summary* panel.
4. Click any related object from the *Related Search*, for example, *Deposits*.

The *Search for related objects* displays with the name of the selected object substituted for the object name.

Deleting a Participant

You can delete a participant that does not have any associated results data. For example, you can delete a participant that was just created either manually or using import, even if the participant has been assigned to one or more positions. You cannot delete a participant that has associated results data. You also cannot delete a participant if that participant is assigned to a position and there are other Commissions objects (such as any credits, measurements, and so forth) that are associated with the position assignment. In both these cases, you should consider end dating it instead.

Deleting a participant removes the participant object from the SAP Cosmmissions repository. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the participant object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log. If the participant is pre-assigned to a transaction, it is recommended that you remove the pre-assignment before the participant is deleted. If the payee pre-assignment is not removed, a warning occurs when running the calculation, but the calculation continues to process.

i Note

To delete a particular version of a participant, use the *Manage Version* icon on the toolbar.

4.2 About Titles

You use a title to group similar positions across the organization. Titles usually group positions related to job functions. For example, "r;Sales Representative" is a Title; "r;Sales Representative for Northern District" is a position. All sales representatives in the organization might share the same title, but each sales representative holds a unique position. Because positions that are related by title are generally compensated in the same way within an organization, companies often assign compensation plans by title. At the same time, you can also import titles.

Titles Workspace

The detail pane of the *Titles* workspace contains core tabs: the *General Information* tab, and the *Assignments* tab. If your SAP Commissions administrator has enabled custom attributes for titles, then a custom fields section is also displayed within the Titles details view panel and to configure these fields you have to click or launch *Configure Detail View* window. You can create titles in the *Titles* workspace.

To create a Title, perform the following steps:

1. Click *Titles* from the *Organization* menu.
2. Click *Add*.
3. Specify the effective start and end date of the new title
4. Click *Ok*
5. Enter the title's name in the *General Information* section of the *Title Details* panel. As a best practice, title names should not be the same as position names. Position and title names should be unique.
 - If your organization has created and implemented business units, you can assign this Title to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
6. (Optional) Type description for the title.
7. (Optional) Click the *Plan* field, search a plan and assign a plan to the title.
 - If your SAP Commissions administrator has enabled custom attributes for titles, then a custom fields section is also displayed within the Titles details view panel and to configure these fields you have to click or launch the *Configure Detail View* window.
8. Click *Save*.

Modifying a Title

You can modify the name and description of a title, its plan assignment, and its custom attributes. If custom attributes have been enabled. You cannot change the business unit of a title if doing so would break the business unit integrity between the title and it is referring to (plans) and referred by (positions) objects.

i Note

If the version of the Title that must be modified is not currently displayed, select the current version and click and edit standard fields.

To modify a Title, perform the following steps:

1. Click *Titles* from the *Organization* menu.
2. Select title(s) that you want to modify.
3. Click *Edit Details* in the *Title Details* panel
4. Change the following in the *Title Details* panel as required:
 - From *General Information*, you can change the Title name, description, and business Unit.
 - Assignments: From the *Plan* tab, you can assign a new default compensation plan to all positions sharing this title. You can override this default. Plan assignment by title is the recommended method for assigning plans.
 - If your Commissions Administrator has enabled custom attributes for titles, then a custom fields section is also displayed within the Titles details view panel and to configure these fields you have to click or launch the *Configure Detail View* window.

Deleting a Title

You can only delete Titles that are not associated with any positions. Deleting a title removes the title object from the SAP Commissions repository. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the title object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log. If the title is pre-assigned to a transaction, it is recommended that you remove the pre-assignment.

i Note

To delete a particular version of a Title, use the *Manage Version* icon on the toolbar.

Finding Objects Related to Titles

You can find data related to one or more Titles by selecting the appropriate object option from the Related pane. The available options and the data returned are as follows:

- **Positions**—returns the positions referring to the selected title.
- **Plans**—returns the plans that the selected title refers to.
- **Fixed Values**—returns the following:
 - Fixed values directly used in the rules belonging to the title plan.
 - Fixed values referred to by other rule elements, such as formulas, that are used in rules belonging to the title plan.
 - Fixed values used in the fixed value variable assignments where the variable assignment is by title. If the variable assignment is by plan, the fixed value assigned to the title plan is returned.
- **Rate Tables**—returns the following:
 - Rate tables directly used in the rules belonging to the title plan.
 - Rate tables referred to by any other rule element, such as formulas, that are used in rules belonging to the title plan.
 - Rate tables used in rate table variable assignments where the assignments are by title. If the variable assignment is by plan, the rate table assigned to the Title plan is returned.
- **Territories**—returns the following:
 - Territories directly used in the rules belonging to the title plan.
 - Territories used in territory variable assignments where the assignments are by title. If the variable assignment is by plan, the territory assigned to the Title plan is returned.
- **Variables**—returns the variables used in the variable assignment of the selected Title.

To find objects related to Titles:

1. Click *Titles* from the *Organization* menu
 2. Search title or titles for which you want to find related data.
 3. Click any related object from the *Related Search*, for example, positions.
- If you are searching for related rule elements (fixed values, rate tables, territories, or variable), the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message *No Records Found* is displayed. Click *OK* to close the message dialog
 - If you are searching for related plans or positions, the *Search For Related Object* dialog displays with the name of the selected object substituted for the object name. The *Search For Related Objects* dialog displays with the name of the selected object substituted for the object name.

4.3 Positions Overview

Positions define specific, unique jobs that participants perform in each specific area of the company. There is a unique position for each participant. Each position in SAP Commissions is grouped under a job title. The

positions created in SAP Commissions typically mirror the positions on your organization chart and reflects subordinate and management positions. As your company grows, you can create new positions and modify existing positions as job responsibilities in your company evolve.

Positions Workspace

The summary pane in the *Positions* workspace can be viewed in both list and tree view. In the detail pane, the detail pane in Positions workspace has two core tabs *General Information* and *Assignments* and *Relationships* if your Commissions Administrator has enabled additional attributes such as custom fields, reporting attributes, and extended attributes are displayed within the details pane.

Positions Workspace in List View

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

| Name | Description | Title | Manager | Business Unit | Participant | Plan | Credit Start | Credit End |
|-------------------------|---------------|---------------------------|---------|-------------------------|-----------------|------|--------------|------------|
| RK Position Subordinate | RK Title 0102 | RK Position 0201 (RK ...) | US | RK First RK Last | | | 1/1/2006 | 1/1/2200 |
| RK Position 0201 | RK Title 0102 | | US | RK First 0102 RK Las... | RK Plan 0102 v2 | | 1/1/2006 | 1/1/2200 |

The display name format for positions can be configured. See the *Commissions Administrator Help* for more information.

Positions Workspace in Tree View

The following figure shows the *Positions* workspace in the tree view. In the tree view, the reporting structure your organization has created is displayed. The tree view displays the number of positions attached to a node.

| Name | Description | Title | Manager | Business Unit | Participant | Plan | Credit Start | Credit End | Process Start | Process End | Position Group | Target Compensation | Last Modified | Effective Start Date | Effective End Date |
|------------------|---------------|-------|---------|----------------------------|-----------------|----------|--------------|------------|---------------|-------------|----------------|---------------------|---------------|----------------------|--------------------|
| RK Position 0201 | RK Title 0102 | | US | RK First 0102 RK Last 0102 | RK Plan 0102 v2 | 1/1/2006 | 1/1/2006 | 1/1/2200 | 1/1/2200 | | | 1/2/2019, 2:57 PM | 1/1/2006 | 1/1/2200 | |

General Information Tab

The following figure shows the *General Information* tab in the *Positions* workspace.

This screenshot shows the 'General Information' tab in the 'Positions' workspace. The tab is selected, indicated by a blue border. Below the tabs, there are several input fields grouped under 'Standard Fields'. The fields include:

- Name (Required): RK Position Subordinate
- Description: RK First RK Last
- Title (Required): RK Title 0102
- Manager: RK Position 0201 (RK First 0102 RK Last 0102)
- Credit Start Date: 1/1/2006
- Business Unit: US
- Process Start: 1/1/2006
- Process End: 1/1/2020
- Position Group: (empty)
- Credit End: 1/1/2000
- Effective Start Date (Required): 1/1/2006
- Effective End Date (Required): 1/1/2006
- Target Compensation: (empty)
- Last Modified (Required): 1/2/2019, 2:59 PM
- Effective End Date (Required): 1/1/2006

Finalized Period Show All button is displayed in detail view that lists all the finalized periods for the position

Plan Input-box

The following figure shows the *Plan* input-box of the *Positions* workspace. From the *Plan*, you can assign a default compensation plan directly to a position or indirectly to all positions sharing a title. In this example, the plan is assigned by position.

i Note

If a plan is assigned by title, the *Plan* field is replaced by the name of the title plan and is followed by the word "(Title)?"

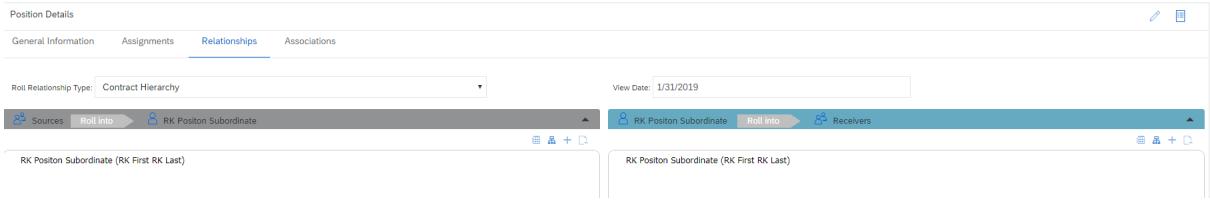
This screenshot shows the 'Plan' input-box in the 'Positions' workspace. The input box is currently empty. To its right, a dropdown menu is open, showing the following options:

- Create New...
- NJ Everest Plan
- RK Plan 0102 v2

If the plan assigned to the title includes rules that include one or more variables, those variables are displayed in the variables assignment area. Also, if a plan has been assigned to the title and a plan summary view has been defined for the plan, you can use set the viewing locale and period then use the *View Plan Summary* icon to view information about the plan.

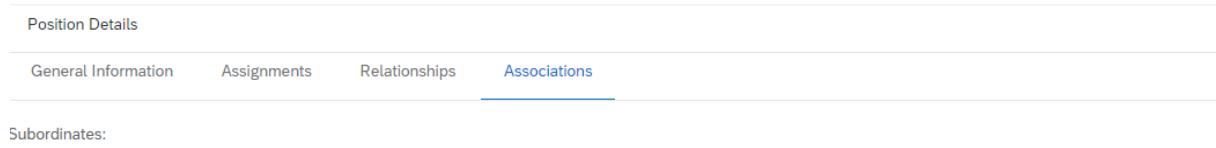
Relationship Hierarchy Tab

The following figure shows the *Relationship Hierarchy* tab in the *Positions* workspace. You can use the *Relationship Hierarchy* tab to view roll relationships for a selected position



Associations Tab

The following figure shows the *Associations* tab of the *Positions* workspace. The *Associations* tab shows all the subordinates directly reporting to the selected position.



Creating a Position

Positions are typically created for employees, but can also be assigned to partners, distributors, or other people associated with your organization. SAP Commissions allows you to process compensation for unoccupied positions (no assigned participants yet), or to process positions assigned to participants at different times in the same pay period. SAP Commissions allows you to allocate credit for sales to the position continuously for reporting, analysis, rollup, and team bonus calculation purposes. You can move positions or create additional positions to accommodate organizational changes.

To create a position, perform the following steps:

1. Click *Positions* from the *Organization* tab.
2. Click *Add*. The *New Position* dialog displays.
3. Specify the effective dates for the new position, and then click *OK*.
4. Enter a name for the position. As a best practice, position names should not be the same as title names.
Title and position names should be unique.
 - If your organization has created and implemented business units, you can assign this position to a business unit by selecting from the Business Units drop-down. Positions, like position groups, can be assigned to only one business unit. You can only select a business unit to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.

i Note

If processing units have been enabled (using the Use Processing Unit calculation preference), you should assign a business unit when you create the position. See the Commissions Administrator Help for more information on business units and processing unit restrictions.

5. (Optional) Enter a Description for the position.
6. Specify a *Title* for this position. The effective dates of the title must be the same or longer than those of the position. You cannot select a title that does not meet this criterion.
7. (Optional) Specify a Manager for this position. This is the position to which this position reports. The effective dates of this manager must be the same or longer than those of the position. You cannot select a manager that does not meet this criterion.

i Note

If processing units have been enabled (using the Use Processing Unit calculation preference), you should assign a business unit when you create the position. See the Commissions Administrator Help for more information on business units and processing unit restrictions.

8. (Optional) Specify a payee. This is the participant currently occupying this position. The effective dates of this participant must be the same or longer than those of the position. You cannot select a participant that does not meet this criterion.
9. (Optional) Specify a position group. See the Commissions Administrator Help for more information. If the *Enable Processing Units* in *System preference* is enabled, all positions in a position group must have the same processing unit and business unit mapping. See the Commissions Administrator Help for information on configuring preferences.
10. (Optional) Enter a Target Compensation. This is the position's target variable compensation. The target compensation is the goal amount of a participant's salary that comes from variable compensation. On-target earnings (OTE) is calculated using this target compensation and base salary provided in the Participants workspace. The target compensation, if entered, displays in the Participant Plan Summary.
11. Consider the following:
 1. To override the credit or processing effective dates for the position, modify or change processing dates by changing Credit start, Credit end, Process start and Process end dates
 2. (Optional) To complete your position:
 - o Click the *Plan* drop-down, to assign a plan to the position.
 - o Click the *Relationship* tab, to specify roll sources and receivers.
 - o Enter Custom attributes values, If your Commissions Administrator has implemented custom attributes.
12. Click *Save*.

Specifying Subordinate Positions

To specify subordinates for the position (that is, positions that report to this position), you create new positions with this position as the manager.

To specify subordinate positions:

1. Click *Positions* from the *Organization* tab.
2. Select *Tree view* on the toolbar to display the reporting structure.
3. Expand the hierarchy until the position for which you want to create subordinates is displayed.
4. Select the position.
5. Click *New* in the *Action* panel.
6. Create the new position.
7. Repeat steps four through six to create additional subordinates.

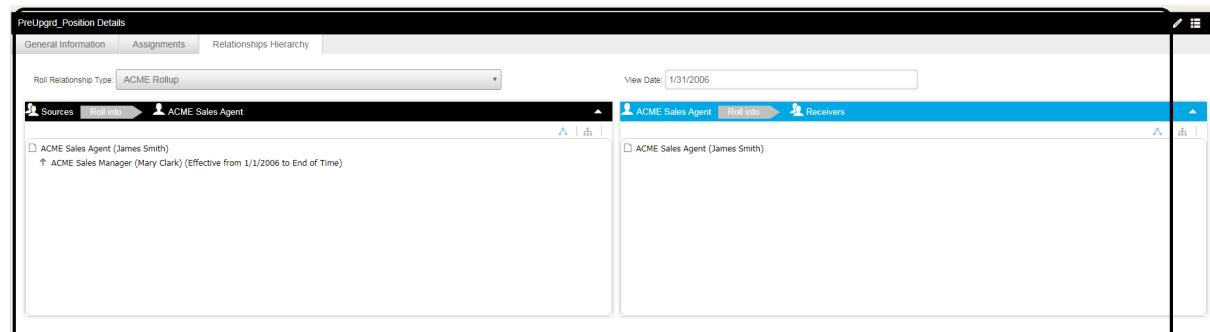
Viewing Roll Relationships from Positions

You can also see roll relationships from the perspective of individual positions.

To view roll relationships from the Positions workspace:

1. Click *Positions* from the *Organization* menu.
2. Search for the position for which you want to view the roll relationships.
3. Select the position in the *Summary* panel.
4. Click the *Relationship* tab to view the roll relationships for that position.

The left pane displays the positions that roll credits to the selected position. The right pane displays the positions that the selection position rolls credits to.



Deleting a Position

You can delete a position that was just created either manually or using import. You cannot delete a position if that position has associated results data. In this case, you should consider end dating it instead. Deleting a position removes the position object from the Commissions. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the position object, including its remove (delete) date, and

information about the object itself. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a position, use the [Manage version](#) on the toolbar.

If the position is pre-assigned to a transaction, it is recommended that you remove the pre-assignment.

Modifying a Position

You can modify some attributes of a position with few or no restrictions. For example, the name, description, and Target compensation can all be easily modified.

i Note

As a best practice, position names should not be the same as title names. Title and position names should be unique. You should keep this in mind when renaming a position.

The following restrictions apply to the other attributes of a position:

- The title, manager, and payee attributes of a position can be modified, but only objects that do not break business unit integrity can be selected.
- The position group can be modified, but only position groups that belong to the same processing unit can be selected.
- The business unit of the selected version of a position can be modified, if the following are true:
 - There are no associated calculation results associated with the selected position version.
 - The business unit selected must be associated with the same processing unit as the business units assigned to the other versions of the position. In other words, different versions of a position can have different business units as long as all the business units are associated with the same processing unit.

i Note

You can only assign one business unit to positions and position groups. There are no Multiple options in the Select Business Unit drop-down.

- Credit Start, Credit End, Process Start, Process End dates can be modified, if certain requirements are met.

You can modify some attributes of multiple positions at once; for example, you can change the Position Group or the Manager for a group of positions. You cannot multi-select positions and update the business units of those positions.

i Note

If the version of the position that must be modified is not currently displayed, select the current version and click the Manage versions option to open the versions for Object dialog. If the version of the title that must be modified is not currently displayed, select the current version and click the Edit Versions icon.

To modify one or more positions:

1. Click [Positions](#) from the [Organization](#) tab.
2. Search for the position or positions to be modified.

If you have assigned plans to positions using titles as well as directly, you must use Advanced Search to find all positions that reference a specific plan. For example, to find all positions that reference a plan called Sales Plan, regardless of whether the plan is assigned by position or title, you should perform an Advanced Search using Advanced Mode with the following search criteria: Position.Plan.Name="Sales Plan" and Position.Title.Plan.Name="Sales Plan".

1. Select the position or positions in the [Summary](#) panel.
2. Make your changes in the detail panel of the [Positions](#) workspace,
3. Click [Save](#).

Editing the Effective Date of a Position Version

You can edit the effective dates for a position version if you have calculation results associated with it; however, the new effective dates must correspond to the calculation run dates. In other words, at least one position version must have effective dates that cover the calculation run period. For example, if you have two position versions effective from 01/01/00 to 05/31/06 and 06/01/06 to EOT respectively, and you also have calculation results for January 2007, you cannot change the effective date range for the second version from 06/01/06 to 12/31/06.

Removing a Participant (Payee) from a Position

Removing a participant (payee) from a position is the same as ending the association between the participant and the position. If the participant is to be removed from a version other than the one currently displayed, click [Manage version](#) on the toolbar and select the correct version.

To remove a participant from a position:

1. Click [Positions](#) to go to the [Positions](#) workspace from the [Organization](#) tab.
2. Search for the position from which you want to remove the [Participant](#).
3. Click [Edit Details](#) in the [Details panel](#) and click [Close](#) button in the participant field. This ensures participant field is successfully removed from the [Position](#).
4. Click [Save](#).

Participants Transitioning in and out of a Position

Commissions provides custom credit and calculation processing dates to handle the following cases:

- A participant leaves a position and continues to be eligible to receive credits and payments from that position until a specified date.
- A participant leaves a position, no longer receives credits, but continues to receive payments from that position until a specified date.
- A participant takes a leave of absence and does not receive any credits during that time, but continues to receive payments in the same position.
- A participant takes a leave of absence, does not continue to receive credits or payments, but continues in the position, and resumes receiving credits and payments after the leave of absence is over.

In these cases, a participant can continue to hold a position in some form (for credit and calculation processing) while another participant enters the position. The participant leaving the position can still be paid for that position for some period of time after leaving, even though another participant has already started receiving credit and payment for the position. A position receives credits and other calculation results (such as payments) based on the position's effective dates. However, you can additionally specify custom dates for when the position should continue to receive credits and other calculation results data. Commissions do not process positions that do not have assigned participants.

Guidelines for Using Position Credit Start, Credit End, Process Start, and Process End

When working with Credit Start, Credit End, Process Start, and Process End dates, keep the following facts in mind:

- The processing start date has been within or equal to the effective start date of the position.
- The processing start date has to be before (cannot be the same as) the processing end date.
- The effective end date of the position has to be the same or after the processing end date.
- The credit and processing end dates can extend after the position's effective end date only if the next position version is associated with a different or no participant.
- Credit processing dates must be within the range of position processing dates.
- Credit Start, Credit End, Process Start and Process End dates cannot begin before the effective date of the position. Credit Start, Credit End, Process Start and Process End dates begin after the position's effective date, or even after the position's effective end date.

The following table summarizes how the Credit Start, Credit End, Process Start and Process End dates for a position (Receiving Credit and Is Processing) affect the position processing. Receiving Credit and Is Processing: Interactions

| Receiving Credit enabled | Is Processing enabled | Effect |
|--------------------------|-----------------------|--|
| X | X | The position assignment receives credit, and payment is calculated for it. |

| Receiving Credit enabled | Is Processing enabled | Effect |
|--------------------------|-----------------------|--|
| | X | <p>The position does not receive any new credits, but existing credits are processed.</p> <p>Note: If you are creating a manual credit or importing a credit and the credit's compensation date is within the position's processing dates but outside the position's credit dates, Commissions issues a warning and allows the credit to be created.</p> |
| | | <p>The position assignment is disabled. Use this combination to retain the position assignment even though no participant is currently assigned to it.</p> |
| | | <p>To terminate a position assignment, you must assign it an effective end date. Examples are included in the following sections.</p> |

i Note

If you have modifiedCredit Start, Credit End, Process Start, and Process End dates, you can specify Is Processing effective dates and not specify Receiving Credit effective dates. However, if you do not specify *Is Processing* effective dates, you cannot specify Receiving Credit effective dates.

Direct credits are processed based on their transaction's compensation date and rolled credits are processed based on their source credit's compensation date. Following are some examples that cover some special cases of positions with Credit Start, Credit End, Process Start, and Process End dates.

Example: Participant Replaced in a Position

Melissa is leaving a 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. Melissa is assigned to Position A with the following effective dates:

- Position version #1 effective: 01/01/2006 to 02/29/2008
- Position is receiving credits effective 01/01/2006 to 03/15/2008
- Position is processing effective 01/01/2006 to 03/15/2008

Mona is assigned to Position A with the following effective dates:

- Position version #2 effective: 03/01/2008 to End Of Time
- Position is receiving credits effective 03/01/2008 to End Of Time

- Position is processing effective 03/01/2008 to End Of Time

In the March 2008 period, both Melissa and Mona receive credits based on transactions with compensation dates between 3/1/08 and 3/15/08. For transactions that have compensation dates between 3/16/08 and 3/31/08, only Mona receives credits.

For Melissa's position assignment, Credit Start, Credit End, Process Start, and Process End dates (custom processing dates) are specified. For Mona's position assignment, no Credit Start, Credit End, Process Start, and Process End dates(custom processing dates) are specified; the credit and processing dates inherit the effective dates from the position.

Example: Participant on Leave

Jeff is assigned to Position B starting on 01/01/2006 with no end date specified, this is version #1. He is taking a leave of absence from 07/01/2008 to 08/31/2008, during which time he does not receive new credits but does receive payments based on credits that have already been allocated to him. When you create a version #2 of the position for the leave of absence, Commissions automatically sets the effective to date on version #1 and creates a *third* version of the position. The positions that now exist are as follows:

- Version #1, which is effective from 01/01/2006 to 6/30/2008
- Version #2, which is effective from 7/1/2008 to 8/31/2008 (with empty Credit Start,Credit End,Process Start and Process End dates)
- Version #3, which is effective from 9/1/2008 to End Of Time

The following bullets describe the effective dates for each position version after you have created the new position version, version #2, to cover the leave of absence.

- The unversioned position was originally effective January 2006 to End of Time. After you create the new version, Version #2, to cover the time for the leave of absence, the original version, Version #1, becomes effective dated from January 2006 to June 2008.
- Version #2 of the position is effective during the leave of absence time, July 2008 to August 2008. For this version of the position, no credits are received and no payments or other results data are processed.
- Version #3 of the position is effective after the leave of absence time, from September 2008 to End of Time. Commissions automatically creates this version of the position to accommodate the need for the position version for the leave of absence.

Example: Held, Rolled Credit

Position C is effective February 15, 2008, to End Of Time, and does not have Credit Start, Credit End, Process Start, and Process End dates specified, the credit and processing effective dates match the position's effective dates. Position C receives rolled credits from Position D, a subordinate. Position D has a held, rollable credit with a release date of March 1, 2008. (The release date is also the credit's compensation date.) This credit is associated with a transaction that has a compensation date of February 5, 2008. Position C receives this held, rollable credit during calculation processing in March 2008.

Example: Participant Leaving a Position

Steve is leaving his position at the end of January, and there is currently no replacement. Steve continues to be processed and receives payments until the end of the following month.

To discontinue the position assignment but retain the position, you create a new version and delete the participant from the new position version. You then edit the earlier position version and specify Credit Start, Credit End, Process Start and Process End dates that extend to the end of the following month.

The position has two effective versions:

- One position version is effective in January 2008 (January 1, 2008, to January 31, 2008). This position version has Credit Start, Credit End, Process Start, and Process End dates modified, and the effective dates are January 1, 2008, to February 28, 2008. Steve is assigned to this position version.
- The other position version is effective in February 2008 (February 1, 2008, to End Of Time). This version does not have a participant assigned to it, and no Credit Start, Credit End, Process Start, and Process End dates are specified.

During calculation processing in February, Commissions processes the January version of the position, even though February is not within the position assignment's effective dates. The January position version is processed in February because the Credit Start, Credit End, Process Start, and Process End dates are effective during February. The February position version is not processed because it does not have an associated participant.

Specifying Credit Start, Credit End, Process Start, and Process End dates

You can override the credit or processing effective dates for the position using Credit Start, Credit End, Process Start and Process End dates. Credit Start, Credit End, Process Start and Process End dates are most commonly used when a participant leaves a position or takes a leave of absence.

To specify Credit Start, Credit End, Process Start, and Process End dates for a position:

1. Click *Positions* from the *Organization* tab.
2. Search for the position for which you want to specify *Credit Start*, *Credit End*, *Process Start*, and *Process End dates*.
3. Select the position in the *Summary* panel.
4. Click *Manage version* to open the *Versions for Object* dialog, then select the correct version. If the appropriate version of the position is not displayed,
5. Select *Credit start*, *Credit End*, *Process Start* and *Process End dates* to enable and display the *Receiving Credit* and *Is Processing* options.
 - The effective dates of the current position version have defaulted for both options. If these dates are not changed, the *Credit Start*, *Credit End*, *Process Start*, and *Process End* dates check box is disabled when the position version is saved.
6. Configure *Credit start*, *Credit end*, *Process start*, *Process end* dates.

- To have the position receive credits, payments, and other results data during calculation processing, leave the *Receiving Credit* option enabled. Then specify the range of effective dates during which the position should receive credit.

If you disable the *Is Processing* option, SAP Commissions automatically disables the receiving credit option because to receive credits, the position must be processed. For the same reason, if both options are disabled, and you enable the Receiving Credit option, the Is Processing option is automatically enabled. The Receiving Credit and Is Processing dates can be different, as long as the Is Processing dates include the Receiving Credits.

- To override the effective dates during which the position is eligible for calculation processing and have the position receive payments and other results data but *not* credits, enable only the Is Processing(process start and process end) option and specify the range of effective dates.
- To have the position not receive either credits or any other results data, deselect both the Receiving Credit and the Is Processing options.
- To make the position version credit and processing dates match the effective dates of the position version itself, deselect Credit start, Credit end, Process start, Process end dates

7. Click [Save](#).

i Note

For both Receiving Credit and Is Processing dates, if you enter the first day of a period as the start date of your effective dates range when you save your changes the date automatically defaults to the period date. For example, if you enter 02/01/2008 as the start date when you save, the start date is displayed as February 2008.

Finding Objects Related to Positions

You can find data related to one or more positions by selecting the appropriate object option from the Related pane. The available options and the data returned are:

- **Participants** —returns the participants associated with the selected position.
- **Titles** —returns the title associated with the selected position.
- **Managers** —returns the manager for the selected position.
- **Subordinates** —returns the subordinates to the selected position, that is, the position that is referring to the current position as manager.
- **Position Groups** —returns the Position Group associated with the selected position.
- **Quotas** —returns the quota assignments for the selected position.
- **Credits** —returns the credits referring to the selected position.
- **Measurements** —returns the measurements referring to the selected position.
- **Commissions** —returns the Commissions referring to the selected position.
- **Incentives** —returns the incentives referring to the selected position.
- **Deposits** —returns the deposits referring to the selected position.
- **Payments** —returns the payments referring to the selected position.
- **Fixed Values**—returns the following:
 - Fixed values directly used in the rules belonging to the position plan.
 - Fixed values referred to by other rule elements, such as formulas, that are used in rules belonging to the position plan.

- Fixed values used in the fixed value variable assignments where the variable assignment is by position. If the variable assignment is by plan, the fixed value assigned to the position plan is returned.
- **Rate Tables**—returns the following:
 - Rate tables directly used in the rules belonging to the position plan.
 - Rate tables referred to by any other rule element, such as formulas, that are used in rules belonging to the title plan.
 - Rate tables used in rate table variable assignments where the assignments are by title. If the variable assignment is by the plan, the rate table assigned to the position plan is returned.
- **Territories**—returns the following:
 - Territories directly used in the rules belonging to the position plan.
 - Territories used in territory variable assignments where the assignments are by position. If the variable assignment is by the plan, the territory assigned to the position plan is returned.
- **Plans**—returns the plan that is directly assigned to the selected position, or the plan that is assigned by title.
- **Variables**—returns the variables used in the variable assignment of the selected position.

To find objects related to positions:

1. Click [Positions](#) to go to the *Positions* workspace from the *Organization* tab.
2. Search for the position or positions for which you want to find related objects.
3. Select the position or positions in the *Summary* panel.
4. Click the object in the *Related* panel, for example, titles.

If you are searching for related plans or related rule elements (fixed values, rate tables, territories, or variables) the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message [No Records Found](#) is displayed. If the object option selected was not plans or a rule element, the [Search For Related Objects](#) dialog displays with the name of the selected object substituted for the object name.

4.4 Position Assignments Overview

In Commissions, you create a position assignment by assigning a participant to a specific position for a specified duration of time. Commissions calculates variable compensation for the position assignment. During the compensation process, credits, commissions and bonuses, and deposits are allocated to position assignments. Position assignments (also called position relationships) can also be imported.

i Note

A position can only have one participant at a time, but a participant can be assigned to multiple positions.

Assigning a Participant to a Position

A participant is assigned to a version of a position within an effective date range that defaults to the current date through end of time. You can change the effective date range using the [Manage Version](#) button, or create a new effective date range using the [New Version](#) button. You can assign only one participant to a position at any given time. To assign another participant to that same position, you must create a new version of the position and assign the new participant to that version.

To assign a participant to a position:

1. Click [Positions](#) from the [Organization](#) menu.
2. Search for the position you want to assign.
3. Select the position in the [Summary](#) panel.

i Note

(Optional step) If this assignment is for an effective date range other than the one currently displayed, click the [Manage version](#) button to open the [Versions for Object](#) dialog, then select the correct version or versions.

4. Specify the name of the participant to be assigned in the [Payee](#) field from the [Details](#) [General Information](#) tab.
5. Click [Ok](#).

Date Constraints for Position Assignments

There are a few date constraints for assigning participants to positions:

- Unless you use a transition position, effective date ranges cannot overlap for a given position assignment. Only one participant can be assigned to a position at a time, but a participant can be assigned to multiple positions at a time.
- Direct credits are created according to the associated transaction's compensation date if the transaction's compensation date is within the effective date range for the position version and Credit start and Credit end dates are specified. The credit's compensation date is the transaction's compensation date.

These dates become important when deciding or analyzing where credits are created and processed.

i Note

To process unoccupied positions, use TBH as an unspecified participant in that position.

4.5 Relationships Overview

As you create positions in the positions workspace, SAP Commissions automatically creates a roll type called reporting. This roll type mirrors your organization's reporting structure and credits are allocated accordingly. For example, a sales manager can receive commissions based on a subordinate salesperson's sales transaction credits. In turn, these credits from which commissions are calculated are typically rolled up to the manager's manager.

As a best practice, you should create another roll type that mirrors your reporting relationships and then make any additions or changes to the copy. Creating a separate roll relationship that parallels the reporting structure allows you the flexibility to change roll relationships without compromising the reporting structure. For example, create a roll type called rollup and create relationships between each position to mirror the reporting structure. In the relationships workspace, you can create additional roll types and reporting relationships. This can be required because organizations often compensate people outside the sales team and it is common to have credits roll from one person to a peer (sometimes called rollover roll type). You can also import relationships to SAP Commissions.

Related Information

[Using the Relationships Workspace \[page 85\]](#)

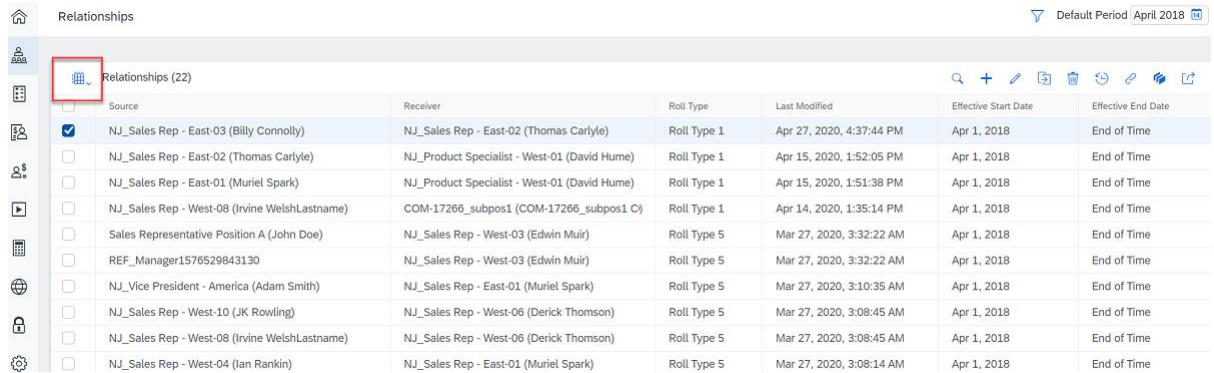
4.5.1 Using the Relationships Workspace

You can access the *Relationships* workspace from the *Organization* menu in SAP Commissions. Depending on your need, you can visualize, review, and manage Relationships using the **Tree View** or **Table View**.

Tree View: This view displays a list of the existing Roll Types. It is a hierarchical representation of all Roll Types and Relationships. You can use this view to drill down to each level of a Roll Type. You can also create Roll Types and Relationships in this view.

| Name | Effective Start Date | Effective End Date |
|--|----------------------|--------------------|
| NJ_Sales Rep - East-01 (Muriel Spark) (6) | Apr 1, 2018 | Jan 1, 2020 |
| NJ_Sales Rep - West-03 (Edwin Muir) (2) | Apr 1, 2018 | End of Time |
| REF_Manager1576529843130 | Apr 1, 2018 | End of Time |
| Sales Representative Position A (John Doe) | Apr 1, 2018 | End of Time |

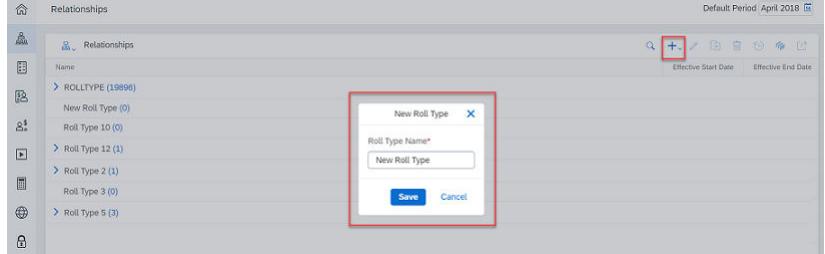
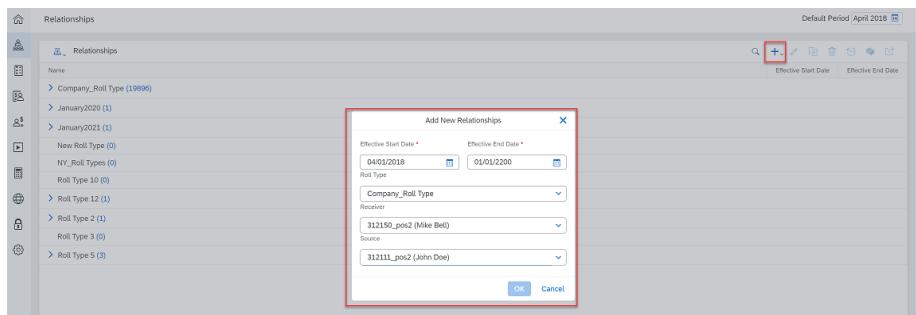
Table View: This view displays existing Relationships between the Source and Receiver participant. It provides a list view of all Relationships. You can configure Relationships between Positions in this view.

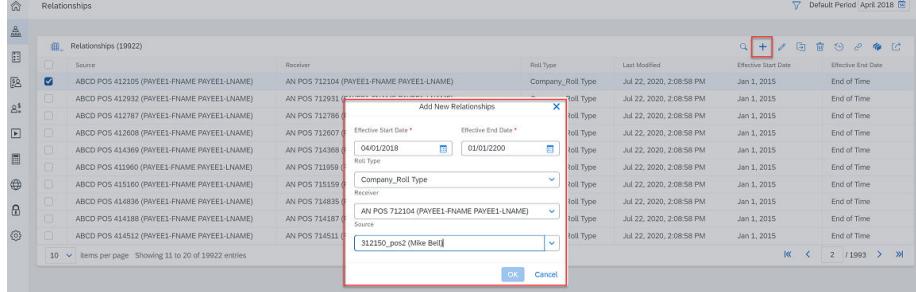


The screenshot shows the Dynamics 365 Relationships grid. A red box highlights the search icon (magnifying glass) in the top right corner of the header. The grid displays 22 relationships with columns for Source, Receiver, Roll Type, Last Modified, Effective Start Date, and Effective End Date. One relationship is selected, indicated by a checked checkbox in the first column.

| | Source | Receiver | Roll Type | Last Modified | Effective Start Date | Effective End Date |
|-------------------------------------|---|--|-------------|--------------------------|----------------------|--------------------|
| <input checked="" type="checkbox"/> | NJ_Sales Rep - East-03 (Billy Connolly) | NJ_Sales Rep - East-02 (Thomas Carlyle) | Roll Type 1 | Apr 27, 2020, 4:37:44 PM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | NJ_Sales Rep - East-02 (Thomas Carlyle) | NJ_Product Specialist - West-01 (David Hume) | Roll Type 1 | Apr 15, 2020, 1:52:05 PM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | NJ_Sales Rep - East-01 (Muriel Spark) | NJ_Product Specialist - West-01 (David Hume) | Roll Type 1 | Apr 15, 2020, 1:51:38 PM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | NJ_Sales Rep - West-08 (Irvine WelshLastname) | COM-17266_subpos1 (COM-17266_subpos1 Obj) | Roll Type 1 | Apr 14, 2020, 1:35:14 PM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | Sales Representative Position A (John Doe) | NJ_Sales Rep - West-03 (Edwin Muir) | Roll Type 5 | Mar 27, 2020, 3:32:22 AM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | REF_Manager1576529843130 | NJ_Sales Rep - West-03 (Edwin Muir) | Roll Type 5 | Mar 27, 2020, 3:32:22 AM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | NJ_Vice President - America (Adam Smith) | NJ_Sales Rep - East-01 (Muriel Spark) | Roll Type 5 | Mar 27, 2020, 3:10:35 AM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | NJ_Sales Rep - West-10 (JK Rowling) | NJ_Sales Rep - West-06 (Derick Thomson) | Roll Type 5 | Mar 27, 2020, 3:08:45 AM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | NJ_Sales Rep - West-08 (Irvine WelshLastname) | NJ_Sales Rep - West-06 (Derick Thomson) | Roll Type 5 | Mar 27, 2020, 3:08:45 AM | Apr 1, 2018 | End of Time |
| <input type="checkbox"/> | NJ_Sales Rep - West-04 (Ian Rankin) | NJ_Sales Rep - East-01 (Muriel Spark) | Roll Type 5 | Mar 27, 2020, 3:08:14 AM | Apr 1, 2018 | End of Time |

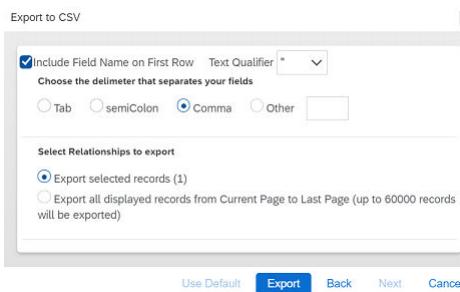
You can perform the following actions using the respective icons available on the top-right of page.

| Action | Description |
|--------|---|
| Create | <p>To create a Roll Type (Tree View only):</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select Tree View. Roll Types can be created only in Tree view. 3. Click the Create icon and + select <i>New Roll Type</i>. 4. Enter a name for the Roll Type and click <i>Save</i>.  |
| | <p>To create a Relationship in Tree View:</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select Tree View. 3. Click the Create icon + and select <i>New Relationship</i>. 4. Set the <i>Effective Start Date</i> and the <i>Effective End Date</i> for the relationship. 5. The <i>Roll Type</i> is populated depending on your location in the hierarchy. 6. Select the appropriate <i>Receiver</i> position if it's not already populated. 7. Select the appropriate <i>Source</i> position. You can add multiple sources if required. 8. Click <i>Save</i>. The Source-Receiver relationship in this Roll Type is created.  |
| | <p>To create a Relationship in Table View:</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select Table View. 3. Click the Create icon +. 4. Set the <i>Effective Start Date</i> and the <i>Effective End Date</i> for the relationship. |

| Action | Description |
|--------|--|
| | <p>5. If you have selected a Roll Type, the <i>Roll Type</i> and <i>Receiver</i> fields are populated in the pop-up window depending on your selection. If these fields are not populated, select a <i>Roll Type</i> and proceed.</p> <p>6. Select a <i>Receiver</i> position (if not populated).</p> <p>7. Select the appropriate <i>Source</i> position. You can add multiple Sources if required.</p> <p>8. Click <i>Save</i>. The Source-Receiver relationship in this Roll Type is created.</p>  |
| Edit | <p>To edit a Roll Type (available only in Tree View):</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select Tree View. 3. Select the Roll Type you want to edit and click the <i>Edit</i> icon . 4. Update the name of the Roll Type and click <i>Save</i> to save your changes. <p>To edit a Relationship:</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select the desired view (Tree View or Table View). 3. Select the record you want to edit and click the <i>Edit</i> icon  <p>88 PUBLIC</p> |

| Action | Description |
|-----------------|--|
| Delete | <p>You can delete a Roll Type from the Relationships workspace only when the Roll Type no longer has any relationships or if it's not referenced in rules or distributions. If you try to delete the Roll Type with existing relationships, an appropriate message is displayed.</p> <p>To delete a Roll Type or Relationship:</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select the desired view (Tree View or Table View). 3. Select the Roll Type or Relationship that you want to delete and click the <i>Delete</i> icon . In Tree View, the delete option is enabled when you select a Roll Type or Source. |
| Manage Versions | <p>You can create new versions and edit existing versions using the Manage Version option.</p> <p>To create or manage versions:</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select the desired view (Tree View or Table View). 3. Select the required Roll Type or Relationship and click the <i>Manage Version</i> icon . In Tree View, the manage version option is enabled when you select a Source. 4. In the <i>Edit Versions</i> window, edit the effective dates as needed and click <i>OK</i>. <p>See Object Versions Overview [page 44] for details.</p> |
| Audit | <p>Audit history displays a quick summary of the Roll Type and Relationship updates. All the changes performed on the selected Roll Type and Relationship are displayed.</p> <p>To audit a Roll Type or Relationship:</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select the desired view (Tree View or Table View). 3. Select the Roll Type or Relationship that you want to audit and click the <i>Audit</i> icon  to view the Audit Summary. In Tree view, the audit option is enabled when you select a Roll Type or Source. <p>See Viewing the Audit History of an Object [page 43] for details.</p> |

| Action | Description |
|------------|---|
| CSV Export | <p>You can export the Relationships to a CSV file.</p> <p>In Tree View, you can export a single relationship (the currently selected record) or a full Roll Type (all displayed records).</p> <p>In Table View, you can export records in bulk. You can select multiple records using the SHIFT key.</p> <p>To export a record:</p> <ol style="list-style-type: none"> 1. Click <i>Organization > Relationships</i>. 2. Select the appropriate view (Tree View or Table View). 3. Select the records you want to export and click the <i>Export</i> icon . 4. In the <i>Export to CSV</i> window, specify if you want to export the Roll Type or Relationship in <i>Select an Object Type</i>. In the <i>Show Fields in this Order</i> box, you can drag and drop the field names to specify the order in which the fields must be displayed in the CSV file. Click <i>Use Default</i> to use the default order. Click <i>Next</i>.  <ol style="list-style-type: none"> 5. To include the field names in the first row, select the <i>Include Field Name on First Row</i> option. 6. Specify the <i>Text Qualifier</i> to use for the exported values. 7. Specify the <i>Delimiter</i> to separate the fields. 8. In <i>Select Relationships to export</i>, you can choose to export the selected records, or export all displayed records from the current page to the last page (up to 60000 records will be exported). You can also specify a range of records to export. 9. Click <i>Export</i>. You can save the CSV file on your system when the export is complete. |

| Action | Description |
|-----------------|--|
| |  |
| Search | <p><i>Simple Search</i>  enables you to perform a quick word-based search across the records.</p> <p>In Tree View, you can conduct a Simple Search within the currently expanded node. For example, if you expand the Roll Type to the first level and this first level has 2000 Relationships, you can search for a specific relationship that exists within the expanded level. If you are unsure what level the relationship you are searching for exists in, it's recommended to use Table View.</p> <p>In Table View, you can search for a Receiver or Source and all associated records are returned.</p> |
| Advanced Search | The <i>Advanced Search</i>  option is available only in Table View. See Advanced Search Overview [page 52] for details. |
| Related Search | The <i>Related Search</i>  option is available only in Table View. Related Search allows you to navigate from the Relationships workspace to the Positions workspace to view details of the associated Receivers or Sources (for a single record). See Related Search Overview [page 61] for details. |

i Note

For information about Default Period, see **Setting the Default Period** in [Starting Commissions Manager \[page 13\]](#).

Related Information

[Relationships Overview \[page 85\]](#)

5 About Plans

Learn about creating and editing plans, their structure, and components.

A compensation plan also referred to simply as a plan, includes a set of rules that specify how compensation is processed for each position assigned to the plan. Plans model your company's compensation policies for a group of participants who are occupying positions that have similar compensation requirements. You can create and edit plans in Commissions. You can also use XML import to import your plans. At the same time, the Components feature allows customers to set up Compensation Plans using Factory Data Templates. There are 20 predefined templates, which cover the most common compensation scenarios.

Related Articles

- [Plans Workspace \[page 92\]](#)
- [Creating a Plan \[page 95\]](#)
- [Adding Rules to a Plan \[page 95\]](#)
- [Plan Assignments \[page 96\]](#)
- [Editing a Plan \[page 98\]](#)
- [Finding Objects Related to Plans \[page 99\]](#)
- [Plan Components \[page 99\]](#)

5.1 Plans Workspace

In the Plans workspace, you can create or edit plans, copy plans, add or remove rules from plans. You can also create rules dynamically in the Plans workspace.

Plan Components

The following figure shows the *Plan Definition* tab and is an example of a plan with rules assigned to it.

The screenshot shows the 'Plan Details' page for a plan named 'LK_TestPlan'. The 'Assignments' tab is selected. In the 'Assignable' area, a dropdown shows 'Test Position'. In the 'Variable Assignments' area, a table lists a variable 'FVV Target Incentive Percent:quarter' assigned to 'Fixed Value'. A note at the bottom states 'This version effective: January 2006 through End Of Time'.

Plan Component Details

General Information

Standard Fields

| | | | |
|----------------|--------------------|-------------|-----------------------|
| Name * | Business Unit_test | Description | Calendar * |
| COM-11207_comp | - | - | Main Monthly Calendar |

Last Modified * 4/17/2019, 11:54 PM Effective Start Date * 2/1/2010 Effective End Date * 1/1/2020

Rules

Credit Rule Measurement Rule Incentive Rule Deposit Rule

| Name | Type | Description | Last Modified |
|----------------------|---------------------------|-------------|--------------------|
| COM_11207_Creditrule | Direct Transaction Credit | | 7/26/2018, 2:10 AM |

Assignments Tab

The following figure shows the **Assignments** tab. In the **Assignable** area, you can see what positions and titles have been assigned to the plan. In the **Variable Assignments** area, you can view and assign rule elements to the variables that have been associated with the plan.

This screenshot shows the 'Plan Details' page with the 'Assignments' tab selected. At the top, there's a dropdown for selecting a plan version, currently set to 'LK_TestPlan (1/1/2006 - 1/1/2200)'. Below it, there are two main sections: 'View Variable assigned by Test Position' and 'View All Variables'. The first section shows a table with one row: 'Sub_payee02 (Pera Bozic)' assigned from '1/1/2006' to '1/1/2200'. The second section shows a table with one row: 'FVV Target Incentive Percent:quarter' assigned as a 'Fixed Value'. A search bar is also present in this section. At the bottom, a note says 'This version effective:January 2006 through End Of Time' and 'All versions effective:January 2006 through End Of Time'.

Multi-Select/Add Rules to the Plan Component Section

Use the **Ctrl** key to select multiple plan components and add them in bulk to a plan.

To multi-select rules to add them to plan components,

1. Go to the *Plans Wizard* workspace and select a plan to edit it in the plan details.
2. Select the *Plan Components* option from the *View by* drop-down. Click the *Add Plan Component* button and you can view a list of plan components.
3. Use **Ctrl** key and select multiple plan components and click the *Add to Plan* button. This adds the selected plan components in bulk to the plan list.

This screenshot shows the 'Plan Details' page with the 'General Information' tab selected. It includes fields for 'Name' (set to 'Quarterly Direct Revenue'), 'Business Unit' (set to 'test'), 'Test Description', and 'Calendar' (set to 'Main Monthly Calendar'). Below these are sections for 'Rules' (Credit Rule, Measurement Rule, Incentive Rule, Deposit Rule) and 'Existing Credit Rule' (a list of plan components: DCR KSO PA 1, DCR KSO PA 2, DCR KSO PA 3, DCR KSO PA 4, DCR KSO PA 5). At the bottom right, there are 'Save' and 'Cancel' buttons, and a large blue 'Add to Plan' button with a hand cursor icon over it.

5.2 Creating a Plan

You can create your rules then create a plan to add them to, or you can create a plan and create and add rules at the same time.

To create a plan, perform the following steps:

1. Click *Plans* from the *Plan Data* menu.
2. Click *Add* from the *Plan Summary* toolbar.
3. Set the effective dates
4. Click *Ok*.
5. Fill out all required fields.
6. Click *Save*.

5.3 Adding Rules to a Plan

Rules can be shared across plans. In other words, the same rule can be used in multiple plans.

i Note

Commissions does not prevent you from creating circular self-references across rules in a plan, but you should not do so. For example, within the same plan, MeasurementA references MeasurementB, and MeasurementB references MeasurementA.

To add rules to a plan, perform the following steps:

1. Click *Plans* from the menu.
2. Search for the plan to which you want to add rules.
3. Click *Edit Details*.
4. Click *Add Existing Rule* and specific to the type of rule (credit, measurement, incentive, or deposit) to be added. A data entry field for the rule name displays.

| Name | Type | Description | Last Modified |
|----------------------|---------------------------|---|---------------------|
| 2015TESTCreditrule1 | Direct Transaction Credit | Produces Credits from Pre-Assigned Booking Transactions | 10/31/2017, 4:35 AM |
| 2015TESTCreditrule2 | Direct Transaction Credit | | 10/31/2017, 4:37 AM |
| COM-6495_Creditrule1 | Direct Transaction Credit | | 8/24/2018, 1:59 AM |
| COM-6495_creditrule3 | Direct Transaction Credit | | 8/31/2018, 3:47 AM |
| CR ECA Booking | Direct Transaction Credit | | 9/20/2017, 3:30 AM |
| CR Indirect Booking | Rolled Transaction Credit | Produces Indirect Credits from Rollable Credits for layers up the Reporting Hierarchy | 9/20/2017, 3:30 AM |
| CR Territory Booking | Direct Transaction Credit | Produces Credits from Transactions that are filtered through Territories (non-ECA) | 9/20/2017, 3:30 AM |
| Credit0912 | Direct Transaction Credit | | 9/12/2018, 9:58 AM |
| Credit1024 | Direct Transaction Credit | | 10/24/2018, 2:30 PM |
| Direct Credit | Direct Transaction Credit | | 12/24/2018, 5:48 AM |

1. Specify the name to be added by doing one of the following in the rule name data entry field:
 - Find and select a rule using wildcard matching, auto-matching, or the *Search* field. If business units are implemented, only rules that have one or more business units in common with the plan are displayed. For example, you cannot add a rule that is assigned to only the EMEA business unit to a plan that is assigned to only the North America business unit. However, if the plan includes both the EMEA and North America business units, a rule that is assigned to only the EMEA business unit can be added. Also, only rules of the type being added are displayed. For example, if you are adding a credit rule and you use the Search field button, you do not need to enter search criteria to restrict the search to just credit rules. The *Select a Rule* dialog automatically displays only credit rules.
 - Create a new rule using the *Create new rule* button. If business units are implemented, the business unit or units assigned to the plan are automatically assigned to the new rule.
1. Search and select *Existing Rule*.
2. Click *Add to Plan* and Save.
 - The rule name and description, if any, display in the Rules area.
1. Continue to add rules.
2. Click *Save* to save the plan.

Related Articles

- [Assigning a Plan by Title \[page 97\]](#)
- [Assigning a Plan to a Specific Position \[page 97\]](#)

5.4 Plan Assignments

You can assign a plan by title, or to a specific position. Plan assignment by title is recommended. When viewing the Plan Summary for the plan, if a plan is assigned to a specific position, the position name is listed. If the plan is assigned by title, the title name is listed.

Related Articles

- [Assigning a Plan by Title \[page 97\]](#)
- [Assigning a Plan to a Specific Position \[page 97\]](#)

5.4.1 Assigning a Plan by Title

As previously mentioned, plan assignment by title is the recommended method for assigning plans. When you assign a plan to a title, Commissions automatically assigns all positions with that title to the specified plan. You can override the title plan assignment by assigning the plan to a specific position.

To assign a plan by title, perform the following steps:

1. Click [Titles](#) from the *Organization* menu.
2. Search for the plan to which you want to assign a title.
3. Select the title to which you want to assign a plan in the [Title Summary](#) pane.
4. Click [Edit Details](#) on top and search and select a plan from the field [Plan](#), specify the plan to be assigned to the title.
5. Click [Save](#).

When you next view the plan from the [Plans](#) workspace, the plan assignment is displayed on the [Assignments](#) tab.

5.4.2 Assigning a Plan to a Specific Position

When you assign a position to a compensation plan, you select an individual position from the Reporting Structure. For performance reasons, you should avoid assigning a single position to its own plan. A position with its own plan should be the exception. Too many individual plans can overpopulate the Commissions Repository with potentially redundant rules and thereby cause a degradation of calculation performance. Reusing compensation plans wherever possible decrease the processing load and makes calculation processing faster.

To assign a plan by position, perform the following:

1. Click [Positions](#) from the *Organization* menu.
2. Search for the plan to which to assign a title.
3. Select the position to which you want to assign a plan from the [Summary](#) panel.
 - If a plan has been assigned to the position by title, the plan name displays in the [Plan](#) field followed by the word (Title).
1. Specify the plan to be assigned to the position in the [Plan](#) field.
1. Click [Save](#).

When you next view the plan from the [Plans](#) workspace, the plan assignment is displayed on the [Assignments](#) tab.

5.5 Editing a Plan

To edit a plan involves any of the following operations:

- Rename the plan
- Add rules to the plan
- Remove rules from the plan
- Change the effective dates of the plan
- Add or remove rule element variable assignments at the plan level

i Note

You cannot change the plan's calendar. You must instead create a new plan. Currently, the association between a calendar and a plan cannot be broken or changed

When you edit a plan, you are editing a specific version of the plan. For example, say you have a Golf Rep Plan that is effective from January 2008 to the End Of Time. If, however, in April 2008 you add a new rule to the plan, it is important to know the effective dates of the change. If you need changes to be back-dated effective as of January 2008, you should edit the current version of the plan (click *Manage Version* in the *Plans* workspace). However, to make changes effective from April 2008 to the End Of Time, you should create a new version of the plan and make the changes to that new version (click *New Version* in the *Plans* workspace).

If you have a plan that is no longer effective, you change the effective end date of the plan to the required date. You do not do a delete operation if the plan was valid for any point in time. To remove a rule from a plan, you must also remove the rule's association with any other objects, such as:

- variables
- formulas
- fixed values
- territories
- rate tables
- lookup tables
- plans
- other rules

5.6 Deleting a Plan

You can delete a plan that was just created either manually or using import even if rules have been assigned to the plan. You cannot delete a plan that has been assigned to either a position or a title without first removing the plan assignment. Deleting a plan removes all versions of the plan object from the SAP Commissions repository. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the plan object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a plan, use the *Manage Version* button

5.7 Finding Objects Related to Plans

You can find data related to one or more selected plans by selecting the appropriate object option from the *Related* icon. The available options and data returned are as follows:

- **Rules:** returns the rules associated with the selected plan.
- **Variables:** returns the variables directly referred to by the rules that belong to the plan. Does not return the variables referred to by formulas that are used by rules belonging to the plan.
- **Formulas:** returns the formulas directly referred to by the rules of the selected plan.
- **Titles:** returns the titles referring to the selected plan.
- **Positions:** returns the positions directly referring to the selected plan. If the plan is assigned by title, returns the position that is referring to the title that is assigned to this plan.
- **Fixed Values:** returns the following:
 - Fixed values directly used in the rules belonging to the selected plan.
 - Fixed values referred to by any other rule element used in rules that belong to the selected plan.
 - Fixed values assigned to the fixed value variables that are assigned to the selected plan.
- **Rate Tables:** returns the following:
 - Rate tables directly used in the rules belonging to the selected plan.
 - Rate tables assigned to the rate table variables that are assigned to the selected plan.
- **Territories:** returns the following:
 - Territories directly used in the rules belonging to the selected plan.
 - Territories assigned to the rate table variables that are assigned to the selected plan.
- **Lookup Tables:** returns the lookup tables directly referred to by the rules of the selected plan. Does not return the lookup tables referred to by formulas that are used by rules belonging to the plan.
- **Quota:** returns the quotas directly referenced by the rules of the selected plan.

To find objects related to plans, perform the following steps:

1. Click *Plans* from the *Plan Data* menu
2. Search for the plan or plans for which you want to find related data.
3. Select the plan or plans in the *Summary* panel.
4. Click any object in the *Related Search*, for example, titles.
 - If you are searching for related positions, fixed values, rate tables, territories, or lookup tables, the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message *No Results Found* displays. If the object option selected was rules, variables, formulas, titles, or quotas, the *Search For Related Objects* dialog displays with the name of the selected object substituted for the object name.

5.8 Plan Components

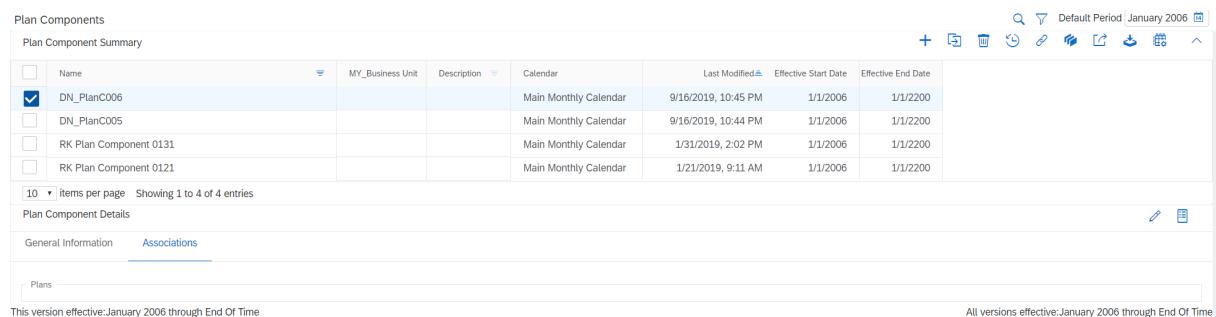
Plan components are collections of rules grouped by business logic. They are maintained centrally in this workspace. Components can also be imported or exported for re-use.

Related Articles

- [Plan Components Workspace \[page 100\]](#)
- [Creating a Plan Component \[page 100\]](#)
- [Adding Rules to a Component \[page 101\]](#)
- [Adding a Component to a Plan \[page 101\]](#)
- [Editing a Component \[page 102\]](#)
- [Deleting a Component \[page 103\]](#)
- [Finding Objects Related to Components \[page 103\]](#)

5.8.1 Plan Components Workspace

In the Components workspace, you can create or edit components, copy components, add or remove rules to or from components. You can also create rules dynamically in the Components workspace.



The screenshot shows a table titled "Plan Component Summary" with the following data:

| Name | MY_Business Unit | Description | Calendar | Last Modified | Effective Start Date | Effective End Date |
|------------------------|------------------|-------------|-----------------------|---------------------|----------------------|--------------------|
| DN_PlanC006 | | | Main Monthly Calendar | 9/16/2019, 10:45 PM | 1/1/2006 | 1/1/2200 |
| DN_PlanC005 | | | Main Monthly Calendar | 9/16/2019, 10:44 PM | 1/1/2006 | 1/1/2200 |
| RK Plan Component 0131 | | | Main Monthly Calendar | 1/31/2019, 2:02 PM | 1/1/2006 | 1/1/2200 |
| RK Plan Component 0121 | | | Main Monthly Calendar | 1/21/2019, 9:11 AM | 1/1/2006 | 1/1/2200 |

Below the table, there are tabs for "General Information" and "Associations". At the bottom, it says "This version effective: January 2006 through End Of Time" and "All versions effective: January 2006 through End Of Time".

Plan Component Details

The Plan Component Details section has two tabs:

- General Information - Contains information about the selected plan, and rules associated with it.
- Associations - Displays plan documents associated with the selected plan.

5.8.2 Creating a Plan Component

You can create a plan component, add rules to them or you can create a component and add it to a plan.

To create a component, perform the following steps:

1. Click [Plan Components](#) from the [Plan Data](#) menu.

2. Click [Add](#).
3. Select a different calendar and set effective dates
4. Click [Ok](#).
5. Enter a unique name for this component in the [Plan Component Details](#) section. The [Summary](#) panel immediately reflects your entries.
6. (Optional) Type a description.
7. (Optional) Select a business unit.
8. Click [Save](#).

5.8.3 Adding Rules to a Component

Rules can be shared across components. In other words, the same rule can be used in multiple components.

To add rules to a component:

1. Click [Plan Components](#) from the [Plan Menu](#)
2. Search for the component to which you want to add rules.
3. Click [Add Existing Rule](#) and specific to the type of rule (credit, measurement, incentive, or deposit) to be added. A data entry field for the rule name displays.
4. Specify the name to be added by doing one of the following in the rule name data entry field:
 - Find and select a rule using the Search field button. If business units are implemented, only rules that have one or more business units in common with the component are displayed. For example, you cannot add a rule that is assigned to only the EMEA business unit to a component that is assigned to only the North America business unit. However, if the component includes both the EMEA and North America business units, a rule that is assigned to only the EMEA business unit can be added.
 - Create a new rule using the Create New Rule button. If business units are implemented, the business unit or units assigned to the component are automatically assigned to the new rule.
5. Enter [Save](#) to save the rule on the component. The rule name and description, if any, display in the [Rules](#) area.
6. Click [Save](#) to save the component.

5.8.4 Adding a Component to a Plan

Components can be shared across plans. In other words, the same component can be used in multiple plans.

i Note

To delete a particular version of a plan, use the [Manage Version](#) button

Adding rules to a plan

1. Click [Plans](#) from the [Plan Data](#) menu.

2. Search for the plan to which you want to add component.
3. Select *Plan Components* from the *View by* option list of the *Plan Details* panel.
4. Specify the name to be added by doing one of the following in the component name data entry field:
 - Find and select a component using the *Search* field. If business units are implemented, only components that have one or more business units in common with the plan are displayed. For example, you cannot add a component that is assigned to only the EMEA business unit to a Plan that is assigned to only the North America business unit. However, if the plan includes both the EMEA and North America business units, a component that is assigned to only the EMEA business unit can be added.
 - Create a new component using the *Add Plan Component New* button. If business units are implemented, the business unit or units assigned to the plan are automatically assigned to the new component.
5. Click *Save* to save the component on the plan. The component name displays in the *Components* area.
6. Continue to add components.
7. Click *Save* to save the plan when all the components are added.

5.8.5 Editing a Component

Editing a component involves any of the following operations:

- Rename the component
- Add rules to the component
- Remove rules from the component
- Change the effective dates of the component
- Add or remove rule element variable assignments at the component level

i Note

You cannot change the component's calendar. You must instead create a new component. Currently, the association between a calendar and a component cannot be broken or changed.

When you edit a component, you are editing a specific version of the component. For example, say you have a Golf Rep Component that is effective from January 2008 to the End Of Time. If, however, in April 2008 you add a new rule to the component, it is important to know the effective dates of the change.

If you need changes to be back-dated effective as of January 2008, you should edit the current version of the component, click *Manage Version* in the *Plans* workspace. However, to make changes effective from April 2008 to the End Of Time, you should create a new version of the component and make the changes to that new version, click *Add New Version* in the *Plans* workspace. If you have a component that is no longer effective, you change the effective end date of the component to the required date. You do not do a delete operation if the component was valid for any point in time. To remove a rule from a component, you must also remove the rule's association with any other objects, such as:

- variables
- formulas
- fixed values
- territories
- rate tables

- lookup tables
- plans
- other rules

5.8.6 Deleting a Component

You can delete a component which is not associated with any plan, even if rules have been assigned to it. You cannot delete a component that has been assigned to any plan. Deleting a component removes all versions of the component object from the SAP Commissions. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the component object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a component, use the *Manage Version*

5.8.7 Finding Objects Related to Components

You can find data related to one or more components by selecting the appropriate object option from the *Related* pane. The available options and the data returned are as follows:

Plans—returns the plans referred to by the selected component.

Rules—returns the rules referred to by the component.

To find objects related to credits:

1. Click *Components* from the *Plan Data* menu.
2. Search for the component or components for which you want to find related objects.
3. Select the component or components in the *Summary* panel.
4. Select an object option, for example, plans in the *Related* panel.
 - If you are searching for related rules, the results are immediately retrieved and displayed in the Rules workspace. If no results are found, the message *No Records Found* is displayed.
 - If you are searching for related plans the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message "No Records Found" is displayed.

5.8.8 Audit History

The Audit history provides the list of all of the changes that have been made to a SAP Commissions object over time.

Plan Component Information in Audit History of Plans

1. Go to *Plan Components* workspace through the *Plans Data* tab in the SAP Commissions Home Page
2. Create a plan component and assign rules to it.
3. Navigate to the *Plans* workspace from the *Plan Data* tab.
4. Create a plan and assign to the plan component created in the step 2.
5. Click the *Audit history* of plans, in the *Rules* section of Plan details, Component section is introduced.
6. Click the *Component* section and it displays the already assigned list of plan components under the *Plan components* section (Step 2).
7. When you click on the component under the list of plan components, it displays all the rule information of that component.

5.9 Real-Time Rule Testing

In this section, you can find information about the real-time rule testing feature, and how to use it in SAP Commissions.

The real-time rule testing feature enables you to validate and troubleshoot your entire rule configuration, including generic attributes during the actual build of the rule without running a pipeline. The benefit of running a rule test is that you can check if your calculation is correct before running a pipeline.

In addition to this, the real-time rule testing feature allows you to extract a log file so that you can troubleshoot and analyze the issue at a more granular level.

! Restriction

This feature is currently limited to the direct transaction credit rule with no transaction participant pre-assignment.

Real-Time Rule Testing - How It Works?

Use this procedure to test the direct transaction credit rule in real-time.

Procedure:

1. Log in to SAP Commissions.
2. Go to *Plan Data > Plans*.
3. Click  (search) and search for the plan.
4. Double-click the plan to open it.
5. In the *Credits* section, choose the Direct Transaction Credit Rule that you want to test and double-click it.

i Note

Make sure to unselect the *Credit if they are identified on the Transaction checkbox*.

6. Click the *Open Rule Test* button.
7. Search for a position associated with the credit.
8. In the *Choose the context to test the rule*, search for a position associated with the rule.
9. Click *Create/Edit transaction*.
10. In the *Create/Edit Transaction List for Rule Testing* workspace, select an existing transaction or create a new one.
11. Click *Validate Inputs > Close* once you have configured the rule.
12. Click *Run Rule Test*.
13. Once the rule test is executed, you can view the results for the selected Transaction and credit output.
To view the calculations in detail click the **View Calculation log** link.

6 Rule Overview

Learn about creating different rule types, and their place in Commissions.

A compensation rule is a 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. You can create and edit rules in Commissions. You can also use XML import to import your rules. Compensation rules are constructed by users to specify how Commissions handles compensation processing for their own business requirements. Each compensation rule specifies the input to a processing stage, condition criteria that must be met, and an action or actions to be taken if the condition is met.

You write compensation rules using Boolean logic—logical statements whose conditions are evaluated as true or false. (If a rule does not have a condition, then it always runs.) Typically the logic of a compensation rule is an if condition, followed by a then action. If the condition is met (true), then the action is performed; if the condition is not met (false), then no further action is taken for that rule for the position assignment being evaluated during calculation processing. Each compensation rule is a set of statements that tells the system what action(s) to perform when defined criteria are met in a specific calculation stage. Compensation plan rules specify how Commissions calculates credits, measurements, incentives, and deposit amounts for participants who are assigned to the plan when the calculation is run.

Compensation plan rules are created in the *Commissions Rule Editor*, where you define the input criteria, conditions under which it is processed, and the action is taken when it is processed. The type of compensation rule corresponds to a calculation stage: credit, primary measurement, secondary measurement, incentive, and deposit. Each calculation stage runs the compensation rules for that stage. Compensation rules in Commissions are used in compensation plans to calculate compensation. Commissions also use classification rules to classify valid transactions during the classification stage of the calculation.

i Note

Classification rules serve a different purpose than compensation rules.

Related Articles

- [Rules Workspace \[page 107\]](#)
- [Rule Types \[page 108\]](#)
- [Rule Elements \[page 109\]](#)
- [Rule Conditions \[page 110\]](#)
- [Rule Actions \[page 111\]](#)
- [Multiple Actions in Rules Overview \[page 111\]](#)
- [Editing a Rule \[page 113\]](#)
- [Finding Objects Related to Rules \[page 115\]](#)
- [Working with Generic Attributes in Rules \[page 115\]](#)
- [Using Multiple Actions in Rules \[page 117\]](#)

- Rules that Produce the Same Result [page 120]
- Rules in Compensation Plans [page 120]

6.1 Rules Workspace

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. The following figure shows an example *Measurement Rule* tab in the rule editor for a secondary measurement. 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.

| Rule Summary | | | | | | | | |
|-------------------------------------|------------------------|------------------------|-----------------------|---------------|---------------------|---------------------------|----------------------|--------------------|
| | Name | Description | Calendar | Business Unit | Last Modified | Type | Effective Start Date | Effective End Date |
| <input checked="" type="checkbox"/> | Everest PM Revenue | Sums up Revenue fro... | Main Monthly Calendar | | 12/18/2018, 4:47 PM | Primary Measurement | 1/1/2018 | 1/31/2018 |
| <input type="checkbox"/> | Primary Measurement... | | Main Monthly Calendar | | 12/18/2018, 4:47 PM | Primary Measurement | 1/1/2006 | 1/1/2200 |
| <input type="checkbox"/> | Everest SM Revenue ... | Revenue Monthly | Main Monthly Calendar | | 12/18/2018, 4:47 PM | Secondary Measurement | 1/1/2018 | 1/31/2018 |
| <input type="checkbox"/> | Direct Credit Rule | | Main Monthly Calendar | | 12/12/2018, 2:53 AM | Direct Transaction Credit | 1/1/2006 | 1/1/2200 |
| <input type="checkbox"/> | testmeasurementrule1 | | Main Monthly Calendar | | 12/7/2018, 2:52 PM | Primary Measurement | 1/1/2006 | 1/1/2200 |
| <input type="checkbox"/> | testincentiverule1 | | Main Monthly Calendar | | 12/7/2018, 2:52 PM | Aggregated Incentive Rule | 1/1/2006 | 1/1/2200 |
| <input type="checkbox"/> | ss_plan_01 | | Main Monthly Calendar | | 12/2/2018, 5:52 AM | Aggregated Incentive Rule | 12/1/2016 | 1/1/2200 |

i Note

The description field can be disabled in the *Rules* workspace. See the *Commissions Administrator Help* for more information about this and other customizations

Rule Details

General Information Associations

Standard Fields

Everest PM Revenue :: Primary Measurement

Rule Basics / Credits / 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: | Everest PM Revenue | Business Unit: | callidussoftware.com Internet access |
| Description: | Sums up Revenue from Credits | | |
| Effective Dates: | 1/1/2018 | to | 1/31/2018 |
| | Calendar: | | |
| | Main Monthly Calendar | | |

Rule editors contain the same basic areas with some exceptions. An input and filters area at the top and one or more action areas. In the input area, you specify the source of the rule. The source for credit rules can be either transactions or orders; the source for measurement rules can be credit or other, and the source for deposit rules can be incentives or deposits. Incentive rules do not take an input source type. In the filters area, you can specify conditions. The input to the rule that meets these conditions causes the actions defined in the actions area. In the actions area, you specify the actions or actions that the rule should execute when the rule conditions are met.

Associations Tab

The following figure shows an example of the *Associations* tab in the *Rules* workspace. From this tab, you can view the plans that contain the rule. You can also view inputs to the rule, the outputs from the rule, and the rules that use the output from the rule.

The screenshot shows the 'Rule Details' interface with the 'Associations' tab selected. On the left, there are sections for 'Plans' (listing 'Everest TestData Plan1' and 'DN_Test_8186') and 'Plan Components'. On the right, there are sections for 'Output(s) from this Rule' (listing 'Measurement: Everest PM Revenue:month:USD' and 'Rules using output(s)' with 'Internet access' highlighted), and 'Others' (listing 'Measurement Rule: Everest SM Revenue MTD' and 'Incentive Rule: Everest IR Base Commissions Flat Rate MTD').

6.2 Rule Types

The following table lists the different types of rules.

| Basic Rule Type | Description | Rule sub-type |
|-----------------------|--|---|
| Credit | Credit rules determine how credits are allocated to position assignments. Credit rules tell Commissions which transactions or rolled credits are to be operated on by a compensation plan, and therefore which credits to consider when calculating compensation for each position assignment under that plan. | <ul style="list-style-type: none">• Rule Transaction Credit• Rolled Transaction Credit• Direct Order Credit• Rolled Order Credit |
| Primary Measurement | Primary measurement rules aggregate the credits for position assignments. This typically means to sum the monetary value of credits. However, you can also define measurement rules to aggregate credits in other ways, such as by different product lines and by counting the number of units sold. | Primary Measurement |
| Secondary Measurement | Secondary measurement rules aggregate primary measurements or perform calculations based on formulas or other values. | Secondary Measurement Rule |

| Basic Rule Type | Description | Rule sub-type |
|-----------------|---|---|
| Incentive | Incentive rules calculate the incentive compensation for each position assignment assigned to the compensation plan. Typically, when Commissions processes an incentive rule, it compares measurements to attainment targets such as quotas for each position assignment. | <ul style="list-style-type: none"> • Incentive Rule • Commission Incentive Rule |
| Deposit | <p>Deposit rules specify which incentives to pay, and</p> <p>when or if to pay them. If deposits need to be held back for any reason, such as for unpaid customer invoices or maximum earning policies for a product, you can indicate in the deposit rule that the deposit is held and for how long.</p> | <ul style="list-style-type: none"> • Deposit Rule • Detail Deposit Rule |

6.3 Rule Elements

To increase flexibility, you can structure your compensation rules to reference rule elements instead of specifying values within the rule. Rule elements are stored independently of the rule and can be used in multiple rules. You can also include one rule element in another. For example, you can write a formula that references a rate table or includes a formula in a rate table. The following table lists the kinds of rule elements.

Kinds of Rule Elements

| Rule | Description |
|-------------|---|
| Fixed value | A numeric 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. |
| Formula | The mathematical expression used to calculate a value. Formulas return a value with an associated unit type. |

| Rule | Description |
|--------------|---|
| Lookup table | The multi-dimensional table used to store a set of values for use in rules and formulas. Compare with the rate table, which is for a specific purpose and contains only two dimensions- rates and tier levels. |
| Quota | Values that apply across an entire reporting structure, and you can manage the different values from a single screen. You can select multiple period types, and perform automatic sum or distribute functions to distribute the quota values across an organization. |
| Rate table | Defines different rates across rate thresholds or tiers. Used to calculate incentive compensation for a step commission. |
| 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 secondary measurement, rules to determine how credits are aggregated. |
| Variable | Use as a placeholder in rules, formulas, and lookup tables to reference a fixed value, rate table, or territory. Variables can be used anywhere these types of rule elements can be used and you can assign different values for each variable in the plan, title, or position level. |

From the [Plan](#) workspace, you can also assign rule elements to variables. You can create rules either from a plan or from the [Rules](#) workspace.

6.4 Rule Conditions

A condition is a set of criteria that must be met before an action can occur. Use conditions to specify when SAP Commissions should process a rule. In the [Condition](#) field, legal moves operates in the same way as when creating formulas. However, the construction of the conditional criteria differs somewhat from how you build formulas. To include a formula as part of a condition, you should do one of the following:

To use a formula in a condition in a rule:

1. List the formula first. For example,
 - Formula1 > 1 AND DataCondition = TRUE
2. Put the formula inside of parentheses. For example:
 - Formula1 > 1 AND DataCondition = TRUE
3. Embed the formula within a function. For example:

- DataCondition = TRUE AND ABS(Formula1) > 1= TRUE. Otherwise, the formula is not available in the legal moves listing.

Null Comparisons in Rule Conditions

In the condition of a compensation rule, a "not equals?" compared to a value that is null causes Commissions to not process the rule. For example, Participant.Attribute 9 <> "bronze? The rule is not processed, because null is not a true value, it is the absence of a value. To cause Commissions to run the rule, the condition should include a condition for null cases. For example, Participant.Attribute 9 <> "bronze? AND Is Null (Participant.Attribute 9) = false

6.5 Rule Actions

Each rule contains one or more actions. When rules are evaluated during calculation processing, actions are executed, commonly referred to as being "fired", to produce an output.

XML Export and Import

In the *Rules* workspace, you can perform XML export or import for the reportable flag and display name for reports' of the rules. To do that, click the *Export to XML* button on *Rules* workspace and from the *Export to XML* dialog select the rules to export and click *Export*. In the XML file that you export where you can find the Reportable flag and Display name for Reports

6.6 Multiple Actions in Rules Overview

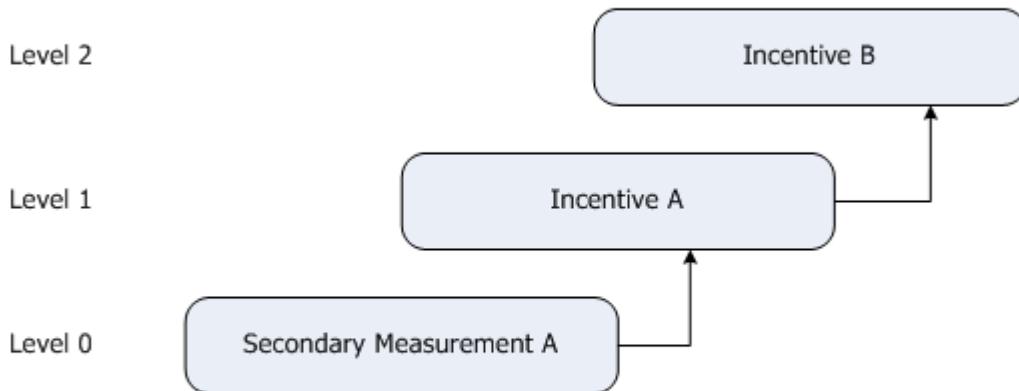
If you are using multiple actions in some of your secondary measurement, incentive, commission, or deposit rules, it is very important that you be aware of how Commissions processes rules in order of dependency. Commissions determines the dependency at the rule level, not at the action level. If you have multiple actions in some of your rules, all of these actions must be at the same dependency level, or you get incorrect results. As part of pre-processing for the *Reward* stage, Commissions determines the dependencies of all *Reward* stage rules. These dependencies determine in what order Commissions processes the rules so that the dependencies are appropriately satisfied.

For example, an incentive rule can depend on the output of another incentive rule, and that rule can depend on the output of a secondary measurement rule, and the secondary measurement rule can depend on the output of a primary measurement rule.

During the Reward stage pre-processing, Commissions calculates the dependency so that the rule at the bottom of the dependency chain is processed first, and then the rules are processed in order of successive

dependency. During the *Reward* stage, Commissions processes all level 0 rules first (or evaluates them to determine that they are not processed). This occurs before Commissions processes any Level 1 rules. After the Level 0 rules have all been evaluated and run, then Commissions evaluates and processes just the Level 1 rules, and so on through all the dependency levels.

Commissions processes rules in order of their dependency



**During the Reward stage,
Commissions first processes Secondary
Measurement A, then Incentive A,
then Incentive B**

Commissions assigns each item in a rule dependency chain a dependency level. In the previous example, the Secondary MeasurementA would be assigned a level 0, as long as it does not depend on any other secondary measurements. The IncentiveA would be assigned a level 1, and the IncentiveB would be level 2.

i Note

You can see the dependency levels listed in the Reward stage log file if you run the calculation in Internal mode.

It is very important to understand that Commissions calculates the rule dependencies at the rule level, and not at the action level. If a rule contains multiple actions that have various dependency levels, Commissions gives the rule the same level as the highest level of action. For example, if the first action of an Incentive rule was the Incentive B from the previous example, its dependency level would be 2. If there was another action in this same rule that simply depended on a Secondary Measurement (which, in turn, had no dependencies), it would be at level 0. However, because the dependencies are computed at the rule level and not at the action level, the entire rule is set at a dependency level of 2. This effectively bumps the second action in this rule from level 0 to level 2 (to match the level of the highest level action in the rule).

Because of rule dependency levels, there are certain guidelines that you must follow if you choose to create multiple actions in rules:

- Be sure that all actions in a rule are of the same dependency level. If in doubt, put the action in a separate rule.
- Never put an action in a rule that depends on another action in the same rule.

i Note

A secondary measurement rule that references a primary measurement and no other result object has a dependency level of zero

During processing, Commissions processes each type of rule independently and in order of calculation processing. This means that Commissions processes all secondary measurement rules before it processes any incentive rules, and it processes all incentive rules before processing any deposit rules.

i Note

A secondary measurement that references a primary measurement and no other result object, is at level 0. From the perspective of the *Reward* stage, there are no dependencies on *Allocate* stage objects (primary measurements), because all primary measurements are already calculated when you get to the Reward stage.

6.7 Overview: Editing a Rule

To edit a rule involves any of the following operations:

- Rename the rule
- Add or remove a rule element (formula, variable, fixed value, rate table, territory, or lookup table)
- Add or remove a condition
- Change the input to a rule
- Rename the rule's output
- Add, remove, or change any of the actions of a rule that contribute to how the rule calculates its results
- Change the effective dates of the rule

The following table lists the restrictions that must be observed when editing rules.

Restrictions on Editing Rules

| Rule Type(s) | Restrictions |
|---------------------------------|--|
| All rule types | You cannot change the calendar of a rule. You must instead create a new rule. Currently, the association between a calendar and a rule cannot be broken or changed. |
| Incentive and measurement rules | All versions of an incentive and measurement rules must have the same output period type and unit type. Do not change the output period type or unit type. Instead, create a new incentive rule with the required output period and unit type. |

Be aware that when you edit a rule, you edit the specified version of the rule. For example, say you have a rule that is effective from March 2008 to the End Of Time. If, however, in May 2008 you change how the rule

calculates the credit, it is important to know the effective dates of the change. If, for example, your changes are to be back-dated effective to March 2008, then you edit the current version of the rule (click [Manage Versions](#) in the [Rules](#) workspace). However, if, your changes are to be effective from May 2008 to the End Of Time, then you create a new version of the plan and make the changes to that new version (click [New Version](#) in the [Rules](#) workspace). If you have a rule that is no longer effective, you change the effective end date of the rule to the required date. You do not do a delete operation if the rule was valid for any point in time. When you go to edit a rule, SAP Commissions displays a message that tells you the plans that the selected rule is assigned to; any change to this rule affects all plans the rule is assigned to.

Related Articles

- [Renaming a Compensation Rule \[page 114\]](#)
- [Deleting a Rule \[page 114\]](#)

6.7.1 Renaming a Compensation Rule

You can rename a rule. When you rename a rule, the rule's output name does not change, unless you directly change the output name as well.

6.7.2 Deleting a Rule

You can delete a rule that does not have any related results data (a calculation run has not yet occurred for the associated plan and position). For example, you can delete a rule that was just created either manually or using import, even if the rule refers to other rule elements. You can also select rules of different types (credit rules, measurement rules, incentive rules, and deposit rules) and delete them if the rules selected do not have related results data. When you multi-select rules of different types, no information is displayed in the detail pane. You cannot delete a rule if it has associated results data. For example, you cannot delete a measurement or incentive rule if [Create Default Data](#) has been run, because [Create Default Data](#) creates empty placeholder objects for these rules. You cannot delete a rule if it is referenced by a plan. You should consider end dating it instead.

Deleting a rule removes all versions of the rule object from the SAP Commissions. However, the audit log in the [Audit Log](#) workspace retains information on the actions performed on the rule object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a rule, use the [Manage Versions](#) button on the toolbar.

6.8 Finding Objects Related to Rules

You can find data related to one or more rules. Specifically, you can find data related to the following objects:

- **Plans:** returns the plans referring to the selected rule.
- **Variables:** returns the variables directly referred to by the selected rule. Does not return the variables referred to by formulas that are used in the rule.
- **Formulas:** returns the formulas directly referred to by the selected rule.
- **Territories:** returns the territories directly referred to by the selected rule.
- **Fixed Values:** returns the fixed values directly referred to by the selected rule.
- **Rate Tables:** returns the rate tables directly referred to by the selected rule.
- **Lookup Tables:** returns the lookup tables directly referred to by the selected rule.
- **Quotas:** returns the quotas directly referred to by the selected rule. the plans referring to the selected rule.

To find objects related to rules, perform the following steps:

1. Click *Rules* from the *Plan Data* menu
2. Search for the rule or rules for which you want to find related data.
3. Click any object in *Related search*, for example, plans.

The *Search for Related* search dialog displays with the name of the selected object substituted for the object name.

6.9 Overview: Generic Attribute

If generic attributes are enabled, you can use those attributes when creating rules. The following table lists the types of rules on which generic attributes can be used and the specific attributes that must be enabled in the *Customization* workspace so that they can be used. See Commissions Administrator Help for more information on enabling extended attributes.

i Note

Generic attributes cannot be used in primary measurement, commission incentive, and detail deposit rules.

Rules Supporting Generic Attributes

| Type of Rule | Controlling Attribute in the Customization Workspace |
|-------------------------------|--|
| Direct transaction credit | Results > Transactions |
| Rolled transaction credit | Results > Transactions |
| Direct order credit | Results > Credits |
| Rolled order credit | Results > Credits |
| Primary measurement | N/A |
| Secondary measurement | Results > Measurements |
| Incentive | Results > Incentives |
| Commission incentive | N/A |
| Deposit (incentive-based) | Deposits |
| Detail deposit (credit-based) | N/A |

Related Articles

- [Using Generic Attributes in Rules \[page 116\]](#)
- [Example: Generic Attributes on Credit Rules \[page 117\]](#)

6.9.1 Using Generic Attributes in Rules

Generic attributes can be used in calculations and included for reporting purposes in some rules. Generic attributes can be included for reporting purposes only in other rules.

Generic Attributes in Calculations

Transaction and credit generic attributes can be used in calculations:

- **Transaction Generic Attributes** - Can be used in direct transaction credit and rolled transaction credit rules. For example, you can include generic attributes, such as Transaction.Generic Attribute 1, in the conditions and actions of these rules. You can also use transaction generic attributes in all other rule types that have access to the Credit.Transaction.* and Source Credit.Transaction.* attributes.
- **Credit Generic Attributes** - Can be used in primary measurement and commission incentive rules. For example, you can include generic attributes, such as Credit.Generic Attribute 1, in the conditions and

actions of these rules. The values for credit generic attributes are generated by the credit rule actions. These attributes are populated when the calculation is run and credits are generated.

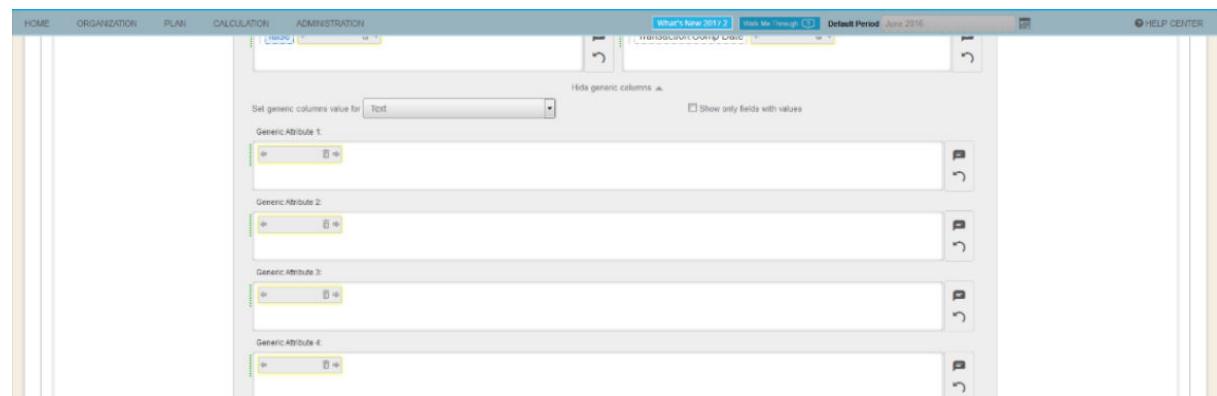
Generic Attributes for Reporting

A common use of generic attributes is for reporting only purposes. For example, if the output amount of a credit rule is based on a calculation, you can store the components of the calculation in a generic attribute. As previously mentioned, transaction and credit generic attributes can be used in calculations as well as for reporting only purposes. In addition, measurement, incentive, and deposit generic attributes can also be used for reporting only purposes:

- **Measurement generic attributes** - Can be included in secondary measurement rules. The values for measurement generic attributes are generated by secondary measurement rule actions. These attributes are populated when the calculation is run and secondary measurements are generated.
- **Incentive generic attributes** - Can be included in incentive rules. The values for incentive generic attributes are generated by incentive rule actions. These attributes are populated when the calculation is run and incentives are generated.
- **Deposit generic attributes** - Can be included in incentive-based, detail deposit rules. The values for deposit generic attributes are generated by deposit rule actions. These attributes are populated when the calculation is run and deposits are generated.

6.9.2 Example: Generic Attributes on Credit Rules

The following figure shows an example of a rolled transaction credit rule with transaction generic attributes enabled. Click on the plus (+) to expand each type of generic attribute available.



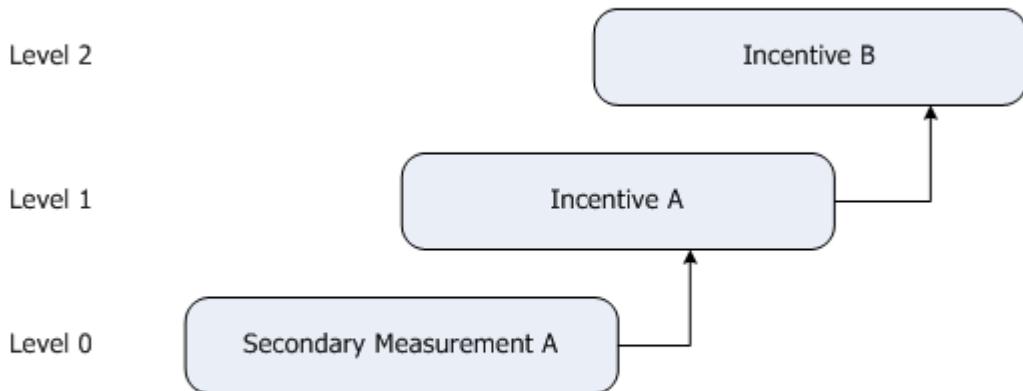
6.10 Multiple Actions Overview

If you are using multiple actions in some of your secondary measurement, incentive, commission, or deposit rules, it is very important that you be aware of how Commissions processes rules in order of dependency. SAP

Commissions determines the dependency at the rule level, not at the action level. If you have multiple actions in some of your rules, all of these actions must be at the same dependency level, or you get incorrect results. As part of pre-processing for the *Reward* stage, SAP Commissions determines the dependencies of all the *Reward* stage rules. These dependencies determine in what order SAP Commissions processes the rules, so that the dependencies are appropriately satisfied.

For example, an incentive rule can depend on the output of another incentive rule, and that rule can depend on the output of a secondary measurement rule, and the secondary measurement rule can depend on the output of a primary measurement rule. During the Reward stage pre-processing, Commissions calculates the dependency so that the rule at the bottom of the dependency chain is processed first, and then the rules are processed in order of successive dependency. During the *Reward* stage, SAP Commissions processes all Level 0 rules first (or evaluates them to determine that they are not processed). This occurs before Commissions processes any Level 1 rules. After the Level 0 rules have all been evaluated and run, then Commissions evaluates and processes just the Level 1 rules, and so on through all the dependency levels.

**Commissions processes rules in
order of their dependency**



**During the Reward stage,
Commissions first processes Secondary
Measurement A, then Incentive A,
then Incentive B**

Commissions assigns each item in a rule dependency chain a dependency level. In the previous example, the Secondary MeasurementA would be assigned a level 0, as long as it does not depend on any other secondary measurements. The IncentiveA would be assigned a level 1, and the IncentiveB would be level 2.

i Note

You can see the dependency levels listed in the *Reward* stage log file, if you run the calculation in Internal mode.

It is very important to understand that Commissions calculates the rule dependencies at the rule level, and not at the action level. If a rule contains multiple actions that have various dependency levels, Commissions gives the rule the same level as the highest level action. For example, if the first action of an incentive rule was the incentive B from the previous example, its dependency level would be 2. If there was another action in this same rule that simply depended on a Secondary Measurement (which, in turn, had no dependencies), it would be at level 0. However, because the dependencies are computed at the rule level and not at the action level, the

entire rule is set at a dependency level of 2. This effectively bumps the second action in this rule from level 0 to level 2 (to match the level of the highest level action in the rule). Because of rule dependency levels, there are certain guidelines that you must follow if you choose to create multiple actions in rules:

- Be sure that all actions in a rule are of the same dependency level. If in doubt, put the action in a separate rule.
- Never put an action in a rule that depends on another action in the same rule.

i Note

A secondary measurement rule that references a primary measurement and no other result object has a dependency level of zero.

During processing, SAP Commissions processes each type of rule independently and in order of calculation processing. This means that Commissions processes all secondary measurement rules before it processes any incentive rules, and it processes all incentive rules before processing any deposit rules.

i Note

A secondary measurement that references a primary measurement and no other result object, is at level 0. From the perspective of the Reward stage, there are no dependencies on Allocate stage objects (primary measurements) because all primary measurements are already calculated when you get to the *Reward* stage.

Related Articles

- [Implications of Inappropriate Multi-Action Rules \[page 119\]](#)

6.10.1 Implications of Inappropriate Multi-Actions Rules

If you put an action in a rule that depends on another action in the same rule, this can cause incorrect results. The errors might or might not result in errors produced in the log file, such as circular reference issues. For example, if ActionA depends upon ActionB, ActionA must be at a higher dependency level than ActionB to get the correct answer. But, because both actions are in the same rule, they both have the same dependency level (that of ActionA). This (in the worst case) leads to strange self-dependency issues and possible circular references errors. In the best case, it causes random results; because within a given dependency level the rule firings are essentially random. That means that in some calculation runs ActionB fires before ActionA. But in other runs, ActionA could fire before ActionB, leading to incorrect results.

i Note

Commissions Manager prevents you from creating circular self-references within the same rule. For example, a circular reference is if you use the output of a rule to calculate the output of the same rule, such as rule output name=IncentiveA and you use IncentiveA to calculate the incentive. (This is different from referring to the output of one action in a rule from another action in the same rule. This form of self-reference is allowed).

If a rule depends on the results of one or more actions in a multi-action rule, Commissions does not process the rules in the correct order. For example, if a multi-action rule has an action with a level 2 dependency and another action with a level 0 dependency, the level 0 action gets bumped to level 2. If there is another rule with a level 1 dependency that depends on the output of the action with a level 0 dependency, that level 1 rule will have an incorrect result. In addition, all rules that depend on the level 1 rule will also have incorrect results.

6.11 Rules that Produce the Same Results

It is possible to create multiple rules that produce results with the same output name. For example, if you have overwritten the default output name, which is normally the same as the rule name, it is possible to have two incentive rules, "Incentive Rule 1" and "Incentive Rule 2", that both produce an incentive output named "Year-End Bonus." If multiple rules produce the same named output, it is imperative that these rules have mutually exclusive conditions that guarantee that only one of these rules be processed during a calculation run. If these rules do not have mutually exclusive conditions, and as a result, more than one rule is processed, the output from the second rule overwrites the output from the first rule, the output from the third rule overwrites the output from the second rule, and so forth. There is no way to guarantee the order in which the rules are processed. Thus, these rules can result in indeterminate and inconsistent calculation results.

An interesting derivation of this scenario is presented by commission rules. A commission rule with a condition processes every eligible credit. For all other rules, the condition is evaluated only once, and the result determines if the rule is processed during a calculation run. A commission rule is an exception because the condition is not applied to the rule as a whole, but rather to each of the credits that are evaluated in the (per-credit) commission process. This means that mutual exclusivity must now be enforced not only at the rule level but also at the credit level. In other words, if one or more of the rules that creates an identically named output is a commission rule, the condition on that rule must be such that it is impossible for even a single credit to satisfy that condition if another rule (or credit evaluation in another commission rule) can produce the same named output during a calculation run. Because a single rule can only have one condition and that condition applies equally to each rule action, it would be impossible to make multiple actions (from the same rule) mutually exclusive. Thus creating multiple actions with the same output within a single rule is not supported.

6.12 Rules in Compensation Plans

Compensation plans are usually composed of five types of rules: credit, primary measurement, secondary measurement, incentive, and deposit. A plan generally contains one or more of each of these rule types; each rule type drives a different processing stage in the calculation. You can create compensation rules independently of a plan in the Rules workspace. You can add the same rule to multiple plans; this is the concept of shared rules. If you update a shared rule, the rule is updated in each plan where it is used. All rules on a plan must be associated with the same calendar as the calendar associated with the plan.

Rules and plans are effectively dated. Changing a rule in an existing plan changes the version of the plan as well as the version of the rule. You can assign a plan to one calendar only. To use a formulaic expression in one rule, just enter the expression in the rule's condition, filter, or calculation/output fields. To reuse the formulaic expression in other rules or rule elements, save it as a formula. Generally, you should create each rule in order of processing - credit, primary measurement, secondary measurement, incentive, deposit - because you are

often prompted to select named input from a previous rule as you create the next rule. All rules on a plan must correspond to the same calendar as the one to which the plan is assigned. You can assign a plan to one calendar only. Rules and plans have effective times. When you change a rule in an existing plan, a new version of the plan is created as well as a new version of the rule.

i Note

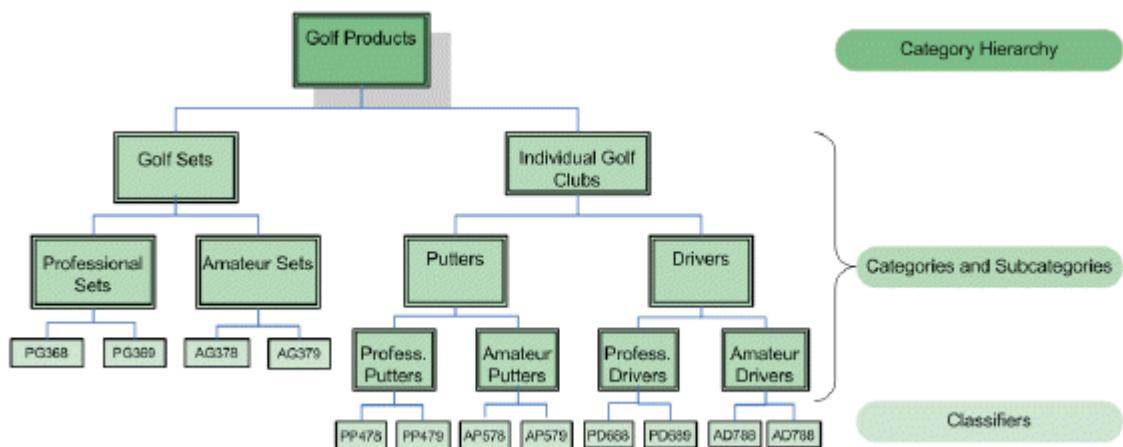
Some compensation plans might not require all five types of compensation rules. For example, you might not need credit rules in a plan that uses only imported credits.

7 Classification Data:Overview

Classification data is a type of reference data. It is used to group or classify sales transactions. Classification data includes categories and classifiers, and is organized into category hierarchies that do the following:

- Identify the individual products or services your company sells (classifiers)
- Identify the product or service lines your company offers (category hierarchies, categories, and subcategories within categories)
- Assign classifiers to categories which includes associating classifiers (products or services) to categories (product or service lines) for a given period of time.
- Identify unassigned classifiers. Unassigned classifiers are classifiers that are assigned to a classifier type but are not associated to a category hierarchy.

The following figure shows a typical category hierarchy and its categories, subcategories, and classifiers.



The classification data workspaces are accessible from [Plan Data > Classifications](#). It includes the categories workspace, workspaces for the pre-defined classifier types (Products, Customers, and Postal Codes), and any other workspaces based on the classifier types defined by your Commissions Administrator.

Category hierarchies can be created from the bottom up, starting with creating classifiers, or from the top down, starting with creating category hierarchies. However, the general activities required to create category hierarchies and associated classification rules, categories and sub-categories, and classifiers and classifier types are as follows:

1. Identify the transaction data to be used to match against classifiers in the category hierarchy. This includes all information used by your company to determine how revenue is credited for sales.
 - For example, if your company allocates credits based on product, you would identify the product information found on the transaction. If your company allocates credits based on postal code, you would identify the postal code information found on the transaction. If your company allocates credits based on customer, you would identify the customer information found on the transaction.
2. Create user-defined classifier types if necessary.
 - Commissions provides three predefined classifier types Product, Customer, and Postal Codes. Your Commissions Administrator can create additional user-defined classifier types that you need by making entries in the Customization workspace. See the Commissions Administrator Help for more information.
3. Create category hierarchies, categories, and classifiers.
 - For example, create a Product category hierarchy with classifiers of the Product classifier type to filter for transactions that contain specific product information. Create a Postal category hierarchy with classifiers of the Postal Code type.
4. Create classification rules for each category hierarchy.

Related Information

[Working With Categories \[page 128\]](#)

[Working With Classifiers \[page 136\]](#)

[About Category Hierarchies \[page 132\]](#)

[Category Hierarchy and Category Effective Dates \[page 136\]](#)

7.1 Classification Data Workspaces

The [Plan Data > Classification](#) workspace contains the [Category](#) tab and the [Classifiers](#) tab.

- The [Category](#) tab lists Categories of all the Classifier Types. See [Categories Workspace \[page 124\]](#) and [Working With Categories \[page 128\]](#) for details.
- The [Classifiers](#) tab provides a hierarchical view (tree view) of the selected Classifier Type. See [Classifiers Workspace \[page 126\]](#) and [Working With Classifiers \[page 136\]](#) for details.

i Note

If you do not have Read permissions to Categories, the tree view is not available in any of the classification data workspaces. See the Commissions Administrator Help for more information on permissions.

7.2 Categories Workspace

The [Categories](#) tab is displayed by default on clicking [Plan Data > Classifications](#). The [Categories](#) tab displays category information in a list view and enables you to perform various functions to create and manage categories. You can add, modify, and delete categories. You can also export and import Generic classifiers via excel in this workspace.

Click on a Category to view the [Category Details](#) page. The [Category Details](#) page enables you to update category information and related data.

| Name | Business Units | Description | Category Hierarchy | Classifier Type | Last Modified | Effective Start Date | Effective End Date | Parent Category |
|-------------------------|----------------|-------------------|--------------------------------|-------------------------------|--------------------|----------------------|--------------------|-----------------|
| NEW CATEGORY | Auto_BU1 | Test Description1 | Acct Prod Rep Override - Tree1 | Account Product Rep Overrides | 10/26/2020 9:55 PM | 1/1/2008 | End of Time | |
| AutoCategory1db20c20843 | Auto_BU1 | Test Description1 | AutoCategoryTree1224602019 | Auto_GC_types | 10/27/2020 3:30 PM | 1/1/2008 | End of Time | |
| AutoCategory1099d51779 | Auto_BU1 | Test Description1 | AutoCategoryTree5eb0b1146 | Products | 10/27/2020 3:28 PM | 1/1/2008 | End of Time | |
| AutoCategory2a9b001779 | Auto_BU1 | Test Description2 | AutoCategoryTree22961147 | Products | 10/27/2020 3:26 PM | 1/1/2008 | End of Time | |
| AutoCategory1a7f702120 | Auto_BU1 | Test Description1 | AutoCategoryTree149421372 | Auto_GC_types | 10/27/2020 2:42 PM | 1/1/2008 | End of Time | |
| AutoCategory152f404844 | Auto_BU1 | Test Description1 | AutoCategoryTree1d47b6109 | Auto_GC_types | 10/27/2020 2:40 PM | 1/1/2008 | End of Time | |
| AutoCategory21c401844 | Auto_BU1 | Test Description2 | AutoCategoryTree2d99501651 | Auto_GC_types | 10/27/2020 2:40 PM | 1/1/2008 | End of Time | |
| AutoCategory2549b02012 | Auto_BU1 | Test Description2 | AutoCategoryTree2d4fb01123 | Products | 10/27/2020 2:38 PM | 1/1/2008 | End of Time | |
| AutoCategory17a0000086 | Auto_BU1 | Test Description1 | AutoCategoryTreee41208995 | Customers | 10/27/2020 1:53 PM | 1/1/2008 | End of Time | |
| AutoCategory537079308 | Auto_BU1 | Test Description1 | AutoCategoryTreecc2e79956 | Products | 10/27/2020 1:39 PM | 1/1/2008 | End of Time | |
| AutoCategory110aa42976 | Auto_BU1 | Test Description1 | AutoCategoryTree1173542160 | Auto_GC_types | 10/27/2020 1:34 PM | 1/1/2008 | End of Time | |
| AutoCategory25d5342976 | Auto_BU1 | Test Description2 | AutoCategoryTree2da4e42260 | Auto_GC_types | 10/27/2020 1:34 PM | 1/1/2008 | End of Time | |

You can perform the following actions using the respective icons available on the top-right of page.

| Action | Description |
|--------|--|
| Search | Use the Search icon to perform a basic search. Search is conducted across all the fields within the table and matching records are returned. |
| Create | Click the Create icon to create a new category. See Creating a Category [page 128] for details. |

| Action | Description |
|------------------------|---|
| Copy | To copy a category, you must first select the category you want to copy and then click the Copy icon. The name of new category is prefixed with <i>Copy of</i> , which you can update as needed. |
| Delete | Use the Delete icon to delete a selected category. You can select multiple categories to delete. See Deleting a Category [page 131] for details. |
| Manage Version | You can create new versions and edit existing versions using the Manage Version option. See Object Versions Overview [page 44] for details. |
| Related Search | Related Search allows you to navigate from the Categories workspace to other associated workspaces such as Classifiers, Parent Category, Plan, Rules, and so on. See Related Search Overview [page 61] for details. |
| Audit | Audit History displays a quick summary of the updates made to a category. Viewing the Audit History of an Object [page 43] for details. |
| Download Excel Data | You can download the category template or data for the selected records. Click the Download Excel Data icon and select the appropriate option. |
| Upload Excel Data | Click on the Upload Excel Data icon and select the excel file to upload data to the workspace. |
| Export to CSV | Click the Export to CSV icon to export the selected categories to a CSV file. You can specify the export options in the Export to CSV dialog. |
| Configure Summary View | Click the Configure Summary View icon to choose which fields should display in the summary (list) view. Mandatory fields are indicated with * and they cannot be removed (moved to Available Fields). Only optional fields can be moved. You can also drag and drop the fields to change the order. |

Related Information

[Working With Categories \[page 128\]](#)

[Working With Classifiers \[page 136\]](#)

7.3 Classifiers Workspace

The *Classifiers* workspace provides a hierarchical view of the Classifiers and the Categories for a selected Classifier Type. This workspace displays details of the predefined classifier types (products, customers, postal codes) and the additional classifier types as defined by your Commissions administrator.

Click the *Plan Data > Classifications > Classifiers* tab to view the classifiers workspace. In this view (when nothing is selected), you can choose a Classifier Type, Create a Category Hierarchy, or Create an Unassigned Classifier.

| Product ID | Name | Description | Price | Cost | Business Units | Last Modified | Effective Start Date |
|-------------------------|------------------------------|------------------------|---------|---------|----------------|---------------------|----------------------|
| AutoProductID4b2679683 | AutoProductName57cc79683 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/27/2020 1:39 PM | 1/1/2006 |
| Unassigned Classifier-1 | Unassigned Classifier-name-1 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/27/2020 9:41 AM | 1/1/2006 |
| AutoProductID206937258 | AutoProductName464437258 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/28/2020 8:25 PM | 1/1/2006 |
| AutoProductID7ef739280 | AutoProductNameaB239280 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/28/2020 1:15 PM | 1/1/2006 |
| AutoProductID0909839590 | AutoProductName7bed39590 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/28/2020 4:18 PM | 1/1/2006 |
| AutoProductID3cfa00627 | AutoProductName596d00627 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/24/2020 11:59 AM | 1/1/2006 |
| AutoProductIDd5b693703 | AutoProductName0fc93703 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/24/2020 11:59 AM | 1/1/2006 |

- Once you select a Classifier Type, you can further select (drill down) to view Categories, Sub-categories, and Classifiers that exist within the selected Classifier Type. As you drill down, navigation links are formed in the left panel that enable you to navigate back and forth the selected objects.
- The *Create* button in the left panel is dynamic depending on the object selected and allows you to create only relevant objects. For example, when you select a Classifier Type, the *Create* button allows you to create a Category Hierarchy. You can create Category Hierarchies, Categories, and Sub-categories in the left panel.
- The list view in the right pane is dynamic and changes depending on the selected navigation link. For example, if you select a category hierarchy, the list displays category hierarchies that exist in the Classifier Type; if you select a category, the list displays all associated categories; and if you select a classifier, the list displays all associated classifiers. Use the expand/collapse icon to view or hide details.

The following image illustrates a hierarchy view in the *Classifiers* tab.

| Product ID | Name | Description | Price | Cost | Business Units | Last Modified | Effective Start Date | End |
|------------------------|--------------------------|------------------------|---------|---------|----------------|--------------------|----------------------|-----|
| AutoProductID4b2679683 | AutoProductName57cc79683 | AutoProductDescription | \$10.00 | \$10.00 | Auto_BU1 | 10/27/2020 1:39 PM | 1/1/2006 | |

Use the icons available on the top right to perform the following actions in the hierarchy view. Only relevant icons are enabled when an object in the hierarchy view is selected.

| Action | Description |
|---------------------|---|
| Search | Use the Search icon to perform a basic search. Search is conducted across all the fields within the table and matching records are returned. |
| Create | Click the Create to create a Classifier. See Creating a Classifier [page 137] for details. |
| Copy | To copy an object, you must first select the object you want to copy and then click the Copy icon. |
| Edit | You can use the Edit icon to edit a Category Hierarchy or Category depending on your section in the hierarchy. To update Classifier information, click on a classifier and edit the information in the details page. |
| Bulk Edit | Use the Bulk Edit option, to update multiple Classifiers in one go. The Bulk Edit button is enabled only when multiple Classifiers are selected. See Editing Multiple Classifiers (Bulk Edit) [page 139] for details. |
| Delete | Use the Delete icon to delete a selected record. You can select multiple objects to delete. |
| Manage Version | You can create new versions and edit existing versions using the Manage Version option. See Object Versions Overview [page 44] for details. |
| Related Search | Related Search allows you to navigate to other associated workspaces such as Classifiers, Parent Category, Plan, Rules, Territories, and so on. See Related Search Overview [page 61] for details. |
| Audit | Audit History displays a quick summary of the updates made to an object. Viewing the Audit History of an Object [page 43] for details. |
| Download Excel Data | You can download the template or data for the selected records. Click the Download Excel Data icon and select the appropriate option. You can also download all the Classifiers using the Download All Classifiers option. |
| Upload Excel Data | Click on the Upload Excel Data icon and select the excel file to upload data to the workspace. |
| Export to CSV | Click the Export to CSV icon to export the selected categories to a CSV file. You can specify the export options in the Export to CSV dialog. |

i Note

If you do not have read permissions to Categories, the tree view option is not available to you. The products, customers, postal codes, and other workspaces associated with user-defined classifier types display information only specific to their Classifier Type.

Related Information

[Working With Classifiers \[page 136\]](#)
[Working With Categories \[page 128\]](#)
[Creating a Category \[page 128\]](#)
[Creating a Classifier \[page 137\]](#)
[About Category Hierarchies \[page 132\]](#)

7.4 Working With Categories

Categories are nodes within a category hierarchy. You can nest categories to create a hierarchy of subcategories. Commissions allows you to create as many categories as you need. Classifiers can be assigned to categories and subcategories. As a best practice, you should create efficient categories so that when you create your territories, which use categories and classifiers, you do not need to build complex expressions. This results in more efficient processing. Categories can also be imported.

Related Articles

- [Creating a Category \[page 128\]](#)
- [Moving a Category \[page 130\]](#)
- [Deleting a Category \[page 131\]](#)

7.4.1 Creating a Category

You can create categories and add them to category hierarchies and other categories to create a nested hierarchy of subcategories. You can create as many subcategories as you need. You cannot create categories with duplicate names within the same category hierarchy. However, you can create categories with the same name in different category hierarchies as long as the combination of the category hierarchy, and the category is unique (effective dates or related classifier types differ). The following tables provide examples of disallowed category names and effective dates, and examples of allowed category names and effective dates.

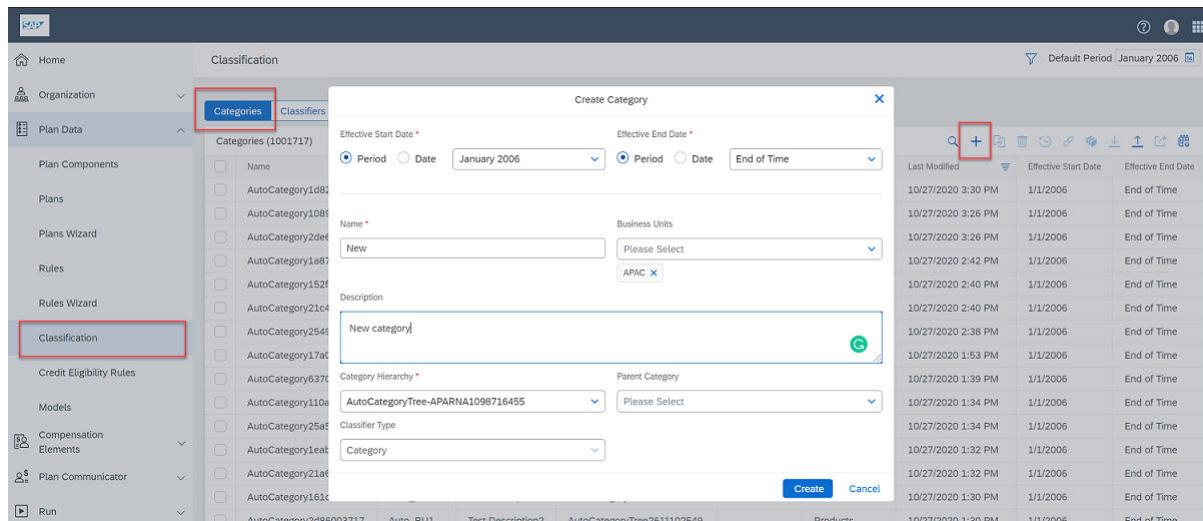
Disallowed Category Hierarchy Names

| Category Hierarchy | Category Name | Classifier Type | Effective Dates |
|--------------------|---------------|-----------------|-----------------|
| Cat Hierarchy A | Category A | Product | Jan 2008 to EOT |

| Category Hierarchy | Category Name | Classifier Type | Effective Dates |
|--------------------|---------------|-----------------|-----------------------|
| Cat Hierarchy A | Category A | Customer | Jan 2008 to EOT |
| Operator | Description | Classifier Type | Effective Dates |
| Cat Hierarchy A | Category A | Product | Jan 2008 to Mar 2008 |
| Cat Hierarchy B | Category A | Product | Jan 2008 to Mar 2008 |
| Cat Hierarchy A | Category A | Customer | Apr 2008 to June 2008 |
| Cat Hierarchy A | Category A | Product | Jul 2008 to Sept 2008 |

Creating a Category in the Categories workspace

1. Click [Plan > Classification > Categories](#) tab.
2. Click [Create](#)
3. Enter a name for the new category in the [Name](#) field in the detail pane.
4. Enter a description.
5. Select the appropriate [Category Hierarchy](#).
6. (Optional) Assign [Business Unit](#).
7. Click [Save](#).

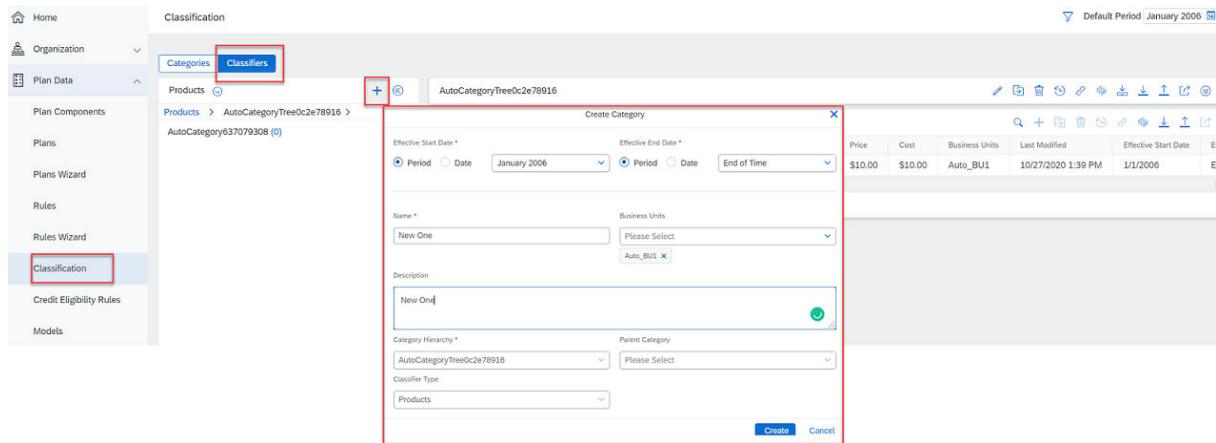


Creating a Category in the Classifiers workspace:

1. Click [Plan > Classification > Classifiers](#) tab.
2. Select the [Classifier Type](#) and select the [Category Hierarchy](#) in which you want to create the Category.
3. Click [Create](#).
4. Enter a name for the new category in the [Name](#) field in the detail pane.
5. Enter a description.

6. (Optional) If you are adding a category directly under the category hierarchy, Commissions automatically fill in the *Category Hierarchy* name and leaves the *Parent Category* field blank. When you add a subcategory below another category, Commissions automatically fill in both the category hierarchy name and the parent category. You normally do not need to change the data in these fields (an exception is moving a category). If your organization has created and implemented business units, you can assign this classifier to a business unit by selecting from the *Business Units* dropdown. You can only select business units to which you as a user have been assigned. If one or more business units have been assigned to the parent category hierarchy or category, the category inherits those assignments. You cannot assign business units that have not also been assigned to the parent category or category hierarchy. See the Commissions Administrator Help for more information about Business Units.

7. Click *Save*.



Related Information

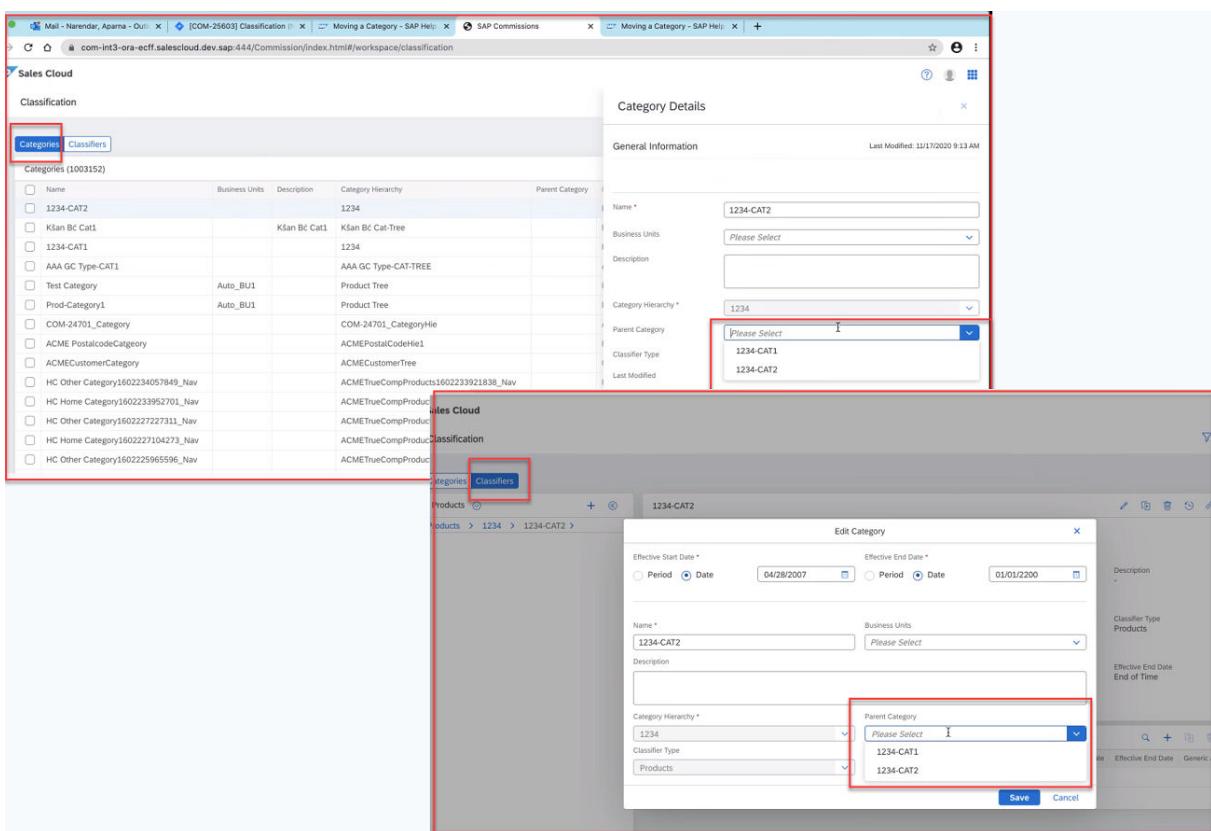
[Working With Categories \[page 128\]](#)

7.4.2 Moving a Category

You can move a category to a different place in the same category hierarchy. You can also move a category to a different category hierarchy if the destination category hierarchy has the same classifier type as the source.

To move a category, perform the following steps:

1. Go to the *Classification* workspace from the *Plan* menu.
2. In the *Categories* or *Classifiers* tab, find and click on the category you want to move. Then use the *Edit* option.
3. Select the name of the new *Parent Category* in the parent category field. You can also delete the parent category. The category then moves to the top of the category hierarchy.
4. Click *Save*.



7.4.3 Deleting a Category

You can delete a category that is not referenced in a rule. For example, you can delete a category that was just created either manually or using import. When you delete a category, the warning “Are you sure you want to delete this category and remove its associated relationship with classifiers” is displayed. If you click **Yes**, the category and the subcategories under it (if any) are deleted. Classifiers associated with the category and subcategories are not deleted, but they are disassociated (removed). Deleting a category removes all versions of the category and subcategory objects from the SAP Commissions. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the objects, including their remove (delete) date, and information about the objects themselves. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a category, use the *Manage Versions* button on the toolbar.

7.4.4 About Category Hierarchies

You can create category hierarchies and their respective classification rules in [Plan Data > Classification > Classifiers](#) tab. The category hierarchy name represents the top node, also called the root, of the category hierarchy structure. Category hierarchies can be created by doing the following:

- Naming the category hierarchy, such as Golf Sets.
- Specifying the classifier type. The predefined classifier types are a product, customer, and postal code. If you have created user-defined classifier types, you can also choose them.
- Creating a classification rule that states the conditions for a match between each sales transaction and the classifiers associated with the category hierarchy. For example, a sales transaction record for a profession driver, PD688, would be matched against the classifier PD688 on the category hierarchy.
- Adding categories such as Golf Sets and Individual Clubs, and subcategories such as Pro Sets and Putters.
- Identifying each of the classifiers (leaf level attached to this structure, such as PP478 under Professional Putter.

Category hierarchies can be simple (with one or two levels) or complex (with many levels), depending on the complexity of the transaction data that is meaningful to your organization. A category hierarchy can also be a simple list of classifiers under a category. You can set up as many category hierarchies as your organization needs.

Related Articles

- [Creating a Category Hierarchy \[page 132\]](#)
- [Building a Classification Rule \[page 133\]](#)
- [Modifying a Category Hierarchy \[page 134\]](#)

7.4.4.1 Creating a Category Hierarchy

Commissions uses categories arranged in hierarchies as the basis for grouping transactions. A category hierarchy can have the same name as a category within it. However, the names of category hierarchies must be unique if the effective dates of the category hierarchies overlap. The following tables provide examples of disallowed category hierarchy names and effective dates and examples of allowed category hierarchy names and effective dates.

Disallowed Category Hierarchy Names:

| Category Hierarchy Name | Classifier Type | Effective Dates |
|-------------------------|-----------------|---------------------|
| Cat Hierarchy A | Product | January 2008 to EOT |
| Cat Hierarchy A | Customer | January 2008 to EOT |

Allowed Category Hierarchy Names:

| Category Hierarchy Name | Classifier Type | Effective Dates |
|-------------------------|-----------------|-------------------------|
| Cat Hierarchy A | Product | Jan 2008 to March 2008 |
| Cat Hierarchy A | Customer | April 2008 to June 2008 |
| Cat Hierarchy A | Product | July 2008 to Sept 2008 |

Category hierarchies that share the same classifier type can share the same classifiers. However, hierarchies that have different classifier types cannot share the same classifiers.

To Create a Category Hierarchy:

1. Click [Plan Data > Classification](#), and select the [Classifiers](#) tab.
2. Click [Create](#). In the [Create Category Hierarchy](#) dialog, specify the [Effective Dates](#) for the new category hierarchy.
3. Enter a name for the Category Hierarchy in the [Name](#) field. The name of the Category Hierarchy can be the same as the name of the Classifier Type.
 - If your organization has created and implemented Business Units, you can assign this category hierarchy to a business unit by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. Categories created under this category hierarchy inherit the business unit assigned here. See the [Commissions Administrator Help](#) for more information about Business Units.
 - By default [Classifier Type](#) is selected based on the Classification Type
4. (Optional) Enter a description.
5. Define a classification rule in the [Expression](#) field.
6. Click [Create](#).

i Note

You can save a category hierarchy without a classification rule, but the classification rule must be defined before running the calculation.

7.4.4.2 Building a Classification Rule

As you create a category hierarchy, you can build a classification rule for that category hierarchy using the Classification Rule field. However, you can save category hierarchies without classification rules, then come back and define your classification rules later. Classification rules are required in the sense that they must exist in order to match a given transaction to only one classifier in a given category hierarchy. If you have several category hierarchies with the same classifier type, the same transaction can be classified under each category hierarchy, but not twice under the same one.

i Note

The following instructions assume you have already created the Category Hierarchy. If you are creating a category hierarchy and building the classification rule at the same time, skip to Step 3, else click [Plan > Classifications](#), and select the [Classifiers](#) tab to proceed.

To build a Classification Rule, do one of the following:

1. Navigate and select the required Category Hierarchy name. If there is an existing rule, it displays in the [Classification Rule](#) field in the detail pane.
2. Build the classification rule by doing one of the following:
 - o In the [Classification Rule](#) field, use wildcard matching and auto-matching to select the required legal moves and operators.
 - o Click the [Formula](#) field button to the right of the [Classification Rule](#) field to open the [New Formula](#) dialog.
3. In the [New Formula](#) dialog, select from the legal moves pane to build the new rule. Click [Ok](#) to save the new rule.
4. Click [Save](#) to save the Category Hierarchy.

7.4.4.3 Working with Classification Rules

A classification rule defines the condition that must occur in order for a transaction to be classified in the associated category. Classification rules drive the classify stage of the calculation.

i Note

After you have created a category hierarchy with its required classifier type, you cannot change the classifier type when you create the classification rule.

The classifier type used for the category determines what elements you can use to build the classification rule for that category. For categories that use classifier types that are predefined for your organization, the classifier fields have specific, descriptive names. You can also have custom attributes on the predefined classifier types, which display on the vustom attributes of the associated workspace (for example, Customers could have a custom attribute description that displays on the [Custom](#) tab in the [Customers](#) workspace). Each classification rule defines in general terms how the field(s) on the transaction that is compared with the classifiers in the category hierarchy. The comparison relationship can be:

- Equal to / not equal to
- Within a specified range (greater than, less than, and so forth)
- Like/Not like

The like and not like operators are used to comparing against a string that includes the "%" wildcard, which means "match against any character in this position".

Valid Classification Rules

For a classification rule to be value, you must have, at a minimum, Transaction.xxx = Classifier.xxx.

In addition, you can also have the following in conjunction with the `and` operator (but it is not mandatory):

- `Transaction.xxx = (a literal value)`
- `Classifier.xxx = (a literal value)`

The following is prohibited:

- `Transaction.xxx = Transaction.yyy`
- `Classifier.xxx = Classifier.yyy`

Null Comparisons in Classification Rules

Commissions does not classify a transaction if the transaction's field referred to in the classification rule is null. For example, if you have the following transaction rule: `Transaction.Billing.Industry <> "r;Manufacturing"`. If the `Transaction.Billing.Industry` field has no value specified, SAP Commissions does not classify the transaction. To avoid transactions not getting classified, be sure to explicitly set the field comparison value in the classification rule.

Literals in Classification Rules

In addition to the comparison matching in a classification rule, you can include a portion of the classification rule that compares a transaction field to a literal value. A classification rule must specify a comparison between a classifier field and a transaction field. You cannot have a valid classification rule that consists solely of a comparison to a literal value. An example of an invalid classification rule is "Transaction.Value greater than \$100.00." The SAP Commissions calculation ignores invalid classification rules.

i Note

For a literal comparison to a data field, it is recommended to put the literal value on the right side of the expression.

Legal Moves for Building Classification Rules

When you are creating a classification rule for a category hierarchy, you choose the individual operations and associated parameters from the Legal Moves that display in the [New Formula](#) dialog. A classification rule must specify a comparison between a classifier field and a transaction field. However, you can also build classification rules that include comparisons between transaction fields and literal values. You cannot, however, have a valid classification rule that consists solely of a comparison to a literal value. The calculation ignores invalid classification rules.

i Note

When referring to one of the default classifier types in a formula or a classification rule, the ID displays in legal moves like the following: `Product.Product ID`. For generic classifiers, the ID displays in legal moves like the following: `AreaCode.ID`.

When creating classification rules that include literals using extended attributes, you should group the extended attributes together. For example, instead of using the following classification rule:

(Product.Product ID = Transaction.Product ID And Transaction.Extended Attribute 1 = "A") Or

(Product.Product ID = Transaction.Product ID And Transaction.Extended Attribute 1 = "B")

you should group the generic attributes together as follows:

(Product.Product ID = Transaction.Product ID) And

(Transaction.Extended Attribute 1 = "A" Or

Transaction.Extended Attribute 1 = "B")

7.4.4.4 Category Hierarchy and Category Effective Dates

Category hierarchies and categories comply with the following effective date rules:

- A category's effective date range must be less than or the same as the effective date range of the category hierarchy. A category cannot be effective for a greater range of time than its category hierarchy.
- A category's effective date range must be less than or the same as the effective date range of the category that the subcategory belongs to. The subcategory cannot be effective for a greater range of time than its owning category.

7.5 Working With Classifiers

A classifier is a unique identifier that a classification rule uses to match a field on a transaction during the classification stage of the calculation.

When you create classifiers, they inherit the classifier type of the category hierarchy they associated with. Hence, all the classifiers in a category hierarchy must be and are of the same classifier type. Classifiers are attached to categories at the leaf-level in the category hierarchy. Each classifier represents a piece of business information such as a Product Id number (PP478). Any sales transaction processed in SAP Commissions that contains a line with (PP478) is classified by Commissions so that the sales representative that sold that product will get credit for the sale.

Classifiers, based on the business information that they want to use to compensate salespeople, can be created first. Category hierarchies which support these classifiers can then be created later. However, you can also create hierarchies and categories in a top-down manner, then create or import classifiers to attach to the categories within these hierarchies.

There is no limit to the number of classifiers you can create (or import). You can add a classifier at the leaf level of any category in any category branch within the category hierarchy. A classifier can exist in multiple category hierarchies, but it can be attached only once in each hierarchy.

You can also create a classifier without associating it to a category hierarchy. However, you can associate a category to the classifier later.

i Note

Unassigned Classifiers are classifiers that are assigned to a Classifier Type but are not associated to a Category Hierarchy. Unassigned Classifiers are not considered for calculations and allocations and are not associated to classification rules.

Related Articles

- [Creating a Classifier \[page 137\]](#)
- [Deleting a Classifier \[page 140\]](#)
- [Assigning a Classifier to a Category \[page 140\]](#)
- [Finding Objects Related to Category Hierarchies ↗](#)
- [Finding Related Objects ↗](#)
- [Modifying Classifier Assignments ↗](#)
- [Versioning of a Classifier \[page 144\]](#)

7.5.1 Creating a Classifier

You can create classifiers and then assign them to categories and subcategories within a category hierarchy later, or you can create and assign classifiers in one single step.

You can also create Unassigned Classifiers, that is, create a classifier without associating it to a category and then associate the classifier to a category hierarchy later on.

You can create as many classifiers as you need. When you create a classifier, you must assign an identifier. The identifiers for the three predefined classifier types (Product ID, Customer ID, and Postal Code id) must be unique. However, the identifiers for generic classifiers do not need to be unique. The following tables provide examples of disallowed category names and effective dates, and examples of allowed category names and effective date.

Disallowed Classifier IDs

| Classifier Type | ID | Name |
|-----------------|--------------------|------|
| Product | Product ID = A | A |
| Customer | Customer ID = A | A |
| Postal Code | Postal Code ID = A | A |

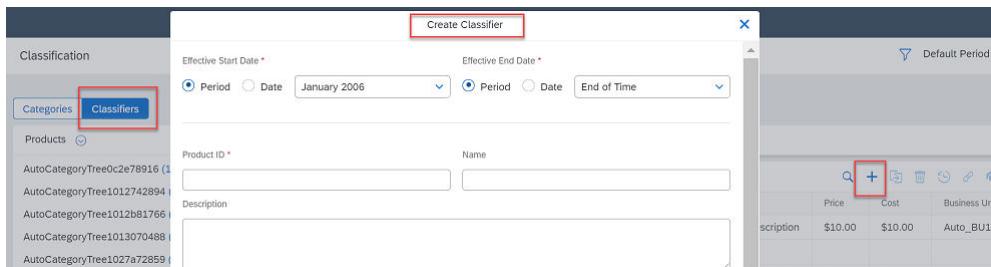
Allowed Classifier IDs

| Classifier Type | ID | Name |
|----------------------|--------------------|------------------------|
| Product | Product ID = A | A |
| Product | Product ID = A | B |
| Customer | Customer ID = A | C |
| Postal Code | Postal Code ID = C | A, B, or anything else |
| Generic Classifier 1 | ID = A | A |
| Generic Classifier 2 | ID = A | A |

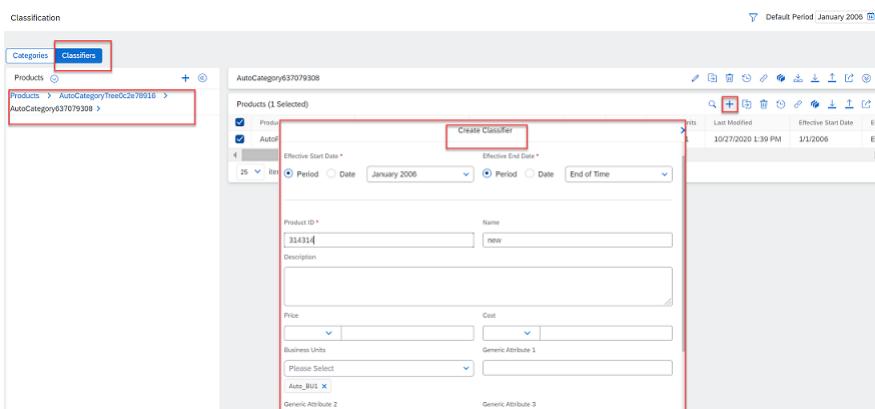
You can add a classifier to any category in the category hierarchy. A classifier can exist in multiple category hierarchies but can exist in each one only once.

Creating a classifier:

1. Click [Plan Data > Classification > Classifiers](#) tab.
 2. Do one of the following:
 - To create an unassigned classifier (i.e, classifier with no associated category), select a classifier type, and click [Create](#) in the right panel.
- All unassigned classifiers belong to a Classifier Type. They don't belong to a specific Category or Category Hierarchy.



- To create a classifier by associating a category, select a classifier type, navigate to the desired category in the hierarchy view, and click [Create](#) in the details panel.



3. Specify effective dates for the new object.

- Enter an ID for the classifier. For example, if you are creating a product classifier from the Products workspace, you might enter TC101 for the Product ID. The *Summary* panel immediately reflects with your entry.
- If your organization has created and implemented business units, you can assign this product to a business unit by selecting from the businessunits dropdown. You can only select a business unit to which you as a user have been assigned. If one or more business units have been assigned to the parent category, the classifier inherits those assignments. See the Commissions Administrator Help for more information about Business Units.
- Enter values for the other fields as defined by your organization.
- Optional. For information about assigning classifiers, see [Assigning a Classifier to a Category \[page 140\]](#).
- Click **Save** to save the classifier.

i Note

You can download classifier data with associated category and classifier information using the [Download Excel Data](#) option.

Related Information

[Working With Classifiers \[page 136\]](#)

7.5.2 Editing Multiple Classifiers (Bulk Edit)

You can update multiple classifiers in one go by using the *Bulk Edit* feature.

To edit classifiers in bulk:

- Click *Plan Data* > *Classification* > *Classifiers* tab.
- First select the Classifier Type and then the respective Classifiers you wish to edit.
- Click *Bulk Edit*.

| Product ID | Name | Description | Price | Cost | Business Units | Last Modified | Effective Start Date | Effective End Date | GAI Account ID |
|---------------------------|---------------------------|-------------|---------|---------|----------------|--------------------|----------------------|--------------------|----------------|
| COM-22310_Classifier2 | COM-22310_Classifier2 | | \$30.00 | \$10.00 | APAC | 10/15/2020 8:14 AM | 8/1/2020 | End of Time | |
| HCBeeswax1588234332780_Ch | HCBeeswax1588234332780_Ch | | \$20.00 | \$10.00 | | 4/30/2020 1:12 AM | 1/1/2020 | End of Time | |
| HCClover1588234329888_Ch | HCClover1588234329888_Ch | | \$10.00 | \$10.00 | | 4/30/2020 1:12 AM | 1/1/2020 | End of Time | |

- Select the fields you want to edit and click outside the dropdown.

| Product ID | Name | Description | Price | Cost |
|---------------------------|---------------------------|-------------|---------|---------|
| COM-22310_Classifier2 | COM-22310_Classifier2 | | \$30.00 | \$10.00 |
| HCBeeswax1588234332780_Ch | HCBeeswax1588234332780_Ch | | \$20.00 | \$10.00 |
| HCClover1588234329888_Ch | HCClover1588234329888_Ch | | \$10.00 | \$10.00 |

- Update the selected fields as needed.

The screenshot shows the 'Bulk Edit (3 Selected)' screen. On the left, a sidebar lists categories like 'Products', 'ACMETrueCompProducts1588234705231_Ch', 'Category123 (0)', 'HC Home Category1588234772561_Ch (3)', 'HC Other Category1588234983983_Ch (0)', and 'new (0)'. The main area displays three classifiers: 'HCBeeswax1588234332780_Ch' (selected), 'HCOrange1588234328173_Ch' (selected), and 'HCClover1588234329888_Ch' (selected). A red box highlights the 'Select Fields to Change' section, which includes fields for 'Description' (set to 'This is a new product') and 'Price' (set to 'CAD | CAS | 1000.00').

- Click **Save**. All selected classifiers will now display the updated field values.

Related Information

[Working With Classifiers \[page 136\]](#)

7.5.3 Deleting a Classifier

You can delete a classifier that was just created either manually or using import. You cannot delete a classifier if it is referred to by a rule, a territory, or a lookup table.

When you delete a classifier, the warning “Are you sure you want to delete this Classifier and remove its associated relationship with Categories” is displayed. If you click **Yes**, the classifier and its assignment to all categories are deleted. Deleting a classifier removes all versions of the classifier from the Commissions. However, the audit log in the [Audit Log](#) workspace retains information on the actions performed on the classifier object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for information on the audit log.

i Note

To delete a particular version of a category, use the *Manage Versions* button on the toolbar.

7.5.4 Assigning a Classifier to a Category

You can assign a classifier to any category in the category hierarchy. A classifier can exist in multiple category hierarchies but exist in each one only once. You can assign an existing classifier to a category or you select a category and create and assign the classifier in a single step. A classifier can be assigned to additional categories.

You can also move a classifier from one category to another by updating the parent category.

Assigning a Classifier in the Category Workspace

1. Click *Plan Data > Classifications > Categories* tab.
2. Select the category to which you want to assign a classifier.
3. In the *Category Details* page, click *Create* to add related data.

The screenshot shows the 'Category Details' page for 'SampleCategory1'. On the left, there's a grid of categories. A red box highlights the 'Categories' tab. On the right, under 'Related data', there's a table for 'Sireesha_Products'. A red box highlights the 'Create' button (a plus sign icon) in the top right corner of this table.

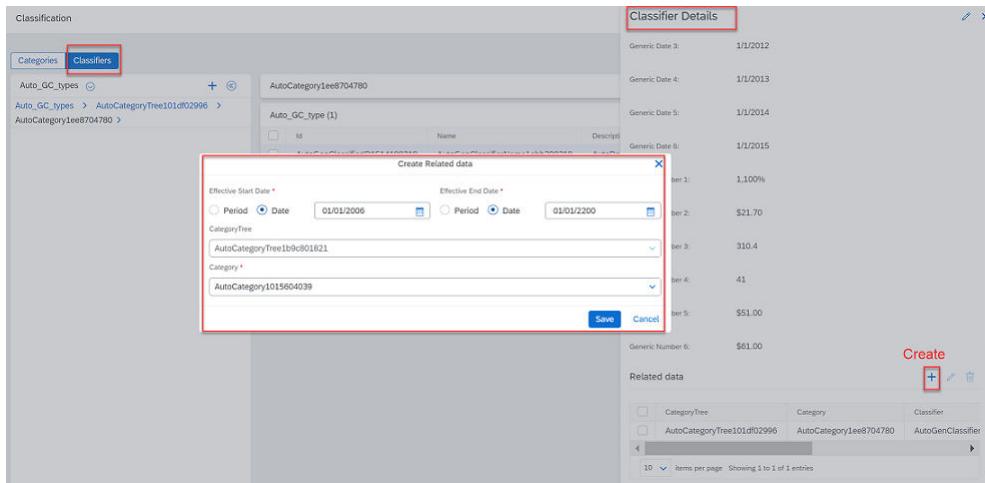
4. Use the *Simple Search* or *Advanced Search* option to find and select the classifiers. Search displays all unassigned classifiers. You can select and assign several classifiers at the same time.

The screenshot shows the 'Category assignment for SampleCategory1' page. It has sections for 'CategoryTree' (set to 'AutoCategoryTree-APARNA1098716455'), 'Category' (set to 'SampleCategory1'), and 'Effective From' and 'Through' dates. A red box highlights the 'Save' button. Below these, there's a 'Postal Codes' table with one entry selected. A red box highlights the 'Edit' button in the table header. At the bottom, there's a search bar and a 'Search' button.

5. Click *Save*. The selected classifiers are added to the category.
6. Optional. You can edit the related data using the *Edit* option. You can delete (remove) the assigned classifiers using the *Delete* option.

Assigning a Category to a Classifier in the Classifiers Workspace

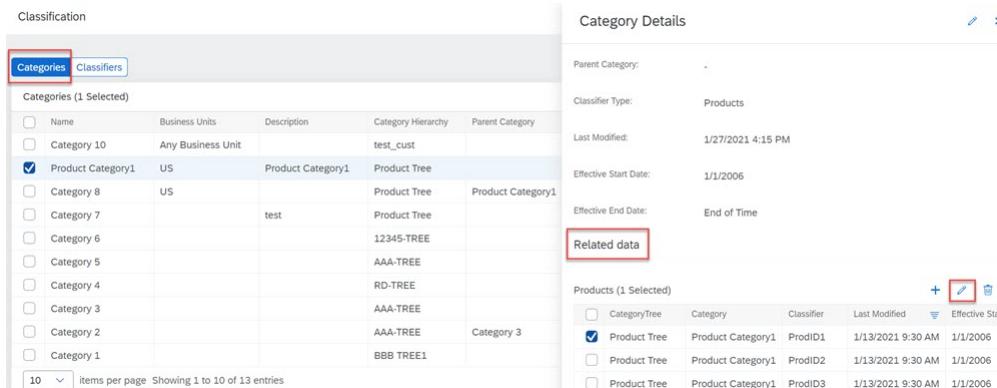
1. Click *Plan Data > Classifications > Classifiers* tab.
2. Navigate in the hierarchy view, and click on the classifier that you want to assign to a category.
3. In the *Classifier Details* page, click *Create* to add related data.



4. In the *Create Related Data* popup, select the *Category* to which you want to assign the Classifier. *Category Hierarchy* is automatically populated.
5. Click *Save*.
6. Optional. You can edit the related data using the *Edit* option. You can delete (remove) the assigned classifiers using the *Delete* option.

Moving a Classifier to a Different Category

1. Click *Plan Data > Classifications > Categories* tab.
2. Select the category to which you want to move a classifier.
3. In the *Category Details* page, select the classifier you want to move.
4. Click *Edit* to update related data.



5. In the *Edit Related Data* popup, select a new parent category from the *Category* dropdown.

6. Click **Save**. The selected classifier is now moved to the specified category.

Related Information

[Working With Classifiers \[page 136\]](#)

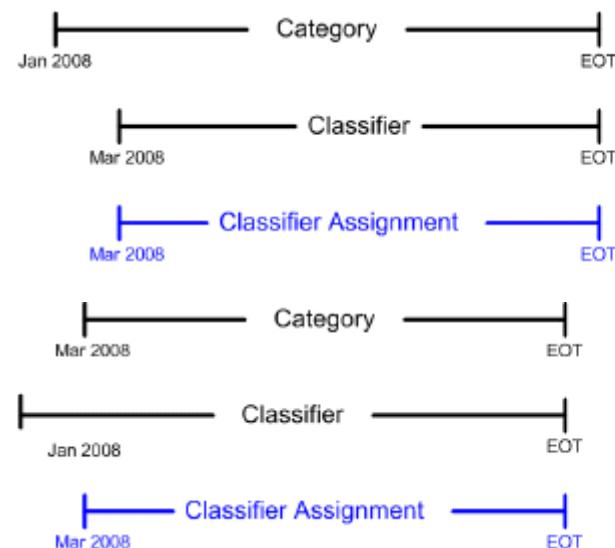
[Working With Categories \[page 128\]](#)

[Classification Data:Overview \[page 122\]](#)

7.5.4.1 About Classifier Assignments

Classifier assignment is the relationship created by assigning a classifier to a category for a specified period of time. Classifier assignments are created when classifiers are added to categories. If the effective dates for a category and classifier differ, the effective date of the relationship between the category and classifier is determined by the overlap of effective dates.

You can perform bulk addition of classifiers to a category. This principle is illustrated in the following figures.



Classifier assignments can also be imported.

Related Information

[Working With Classifiers \[page 136\]](#)

[Assigning a Classifier to a Category \[page 140\]](#)

7.5.5 Versioning of a Classifier

Effective dates of an associated classifier can be edited using the *Manage version* dialog. You cannot create different versions of the association but will be able to edit the version dates. Hence, a version of the classifier can be associated to a category. The same behavior applies to the classifier to category association. You need to save the classifier or category before creating the association. If there are multiple versions of the object, then the last version of the object in the assignment date range is displayed..

7.5.6 About Classifier Types

SAP Commissions supplies you with the following predefined classifier types:

- Products
- Customers
- Postal Codes

Your organization could add other user-defined classifier types. For example, if your company allocates credits based on product information found on the transaction, you can use a category hierarchy with classifiers of the Product classifier type to filter for transactions that contain specific product information. If your company allocates credits based on both product and postal code, you can use two category hierarchies: one with classifiers of the Product classifier type, and the other with classifiers of the Postal Code type. You could also have more than one category hierarchy with the same classifier type.

For example, your SAP Commissions administrator might create two category hierarchies with the Product classifier type, one for regular company products and one for Special Product Incentives Fund (SPIF) containing products or groups of products for which special commissions or bonuses are assigned for limited sets of dates. Commissions supplies separate workspaces on the Classification tab for each of the predefined classifier types, as well as separate workspaces for user-defined classifier types that your organization creates. See [Working With Classifiers \[page 136\]](#) for more details.

8 Credit Rules Overview

A credit rule identifies the credits on which a plan operates and allocates them to position assignments. The SAP Commissions uses credit rules to analyze transactions, orders, or rollable credits to determine which position assignments should receive credits for a transaction. In addition to being created by credit rules, credits can also be imported into SAP Commissions and can be created manually. As a best practice, it is recommended that you allow SAP Commissions to calculate credits. Credit rules drive the allocate credits and primary measurement step of the allocate stage of the calculation. The output of credit rules, individual credits associated with position assignments, is used as input to primary measurement rules. See the Commissions Administrator Help for more information on the allocate stage. There are four kinds of credit rules: direct transaction credit, rolled transaction credit, direct order credit, and rolled order credit rules. The following table summarizes these credit rules, and identifies their inputs and their outputs.

| Type of credit rule | Description |
|---------------------|---|
| Direct transaction | Input is transactions; generates direct credits. |
| Rolled transaction | Input is rollable credits that are based on transactions; generates rolled credits. |
| Direct order | Input is orders; generates direct credits. |
| Rolled order | Input is rollable credits that are based on orders; generates rolled credits. |

i Note

If a compensation plan relies on imported credits, you probably do not need to create credit rules for that plan.

Related Articles

- [Input and Filters in Credit Rules \[page 145\]](#)
- [Actions in Credit Rules \[page 146\]](#)
- [Creating a Credit Rule \[page 150\]](#)

8.1 Input and Filters in Credit Rules

In the [Credit Rule](#) editor, you can limit the data evaluated by a credit rule by specifying the input source, either transactions or orders, and creating filters. The filters area for order credit rules is similar to the source and filters area for a transaction credit rule, but you cannot specify a territory for an order credit rule.

i Note

The pre-assigned option, next to the **Source** field, is available only when the source is transactions and is only used in conjunction with creating direct transaction credit rules.

In the filters area fields you can do the following:

- **Condition**—Enter a simple or complex expression of conditions that must be met for the rule to be evaluated as true and fired.
- **Territory**—Select one or more territories, territory variables, categories, or classifiers on which to filter. You can also build an expression that includes a combination of categories or classifiers or both with or without territories or territory variable.
- **Roll type**—Specify the name of the roll type if the input is indirect (rolled) credits. The combination of source and roll type affects how the rule is structured. If you select transaction as the source and leave the roll type blank (thereby specifying that rolled credits are not used as input), you are creating a direct transaction credit rule.

When a transaction or order meets the filtering criteria, it is evaluated against the condition in the rule. Otherwise, the condition in the rule is not evaluated.

8.2 Actions in Credit Rules

When conditions specified in the filters area are met, the action or actions defined in this area are fired (executed) and a credit output is produced. Among other things, you can specify in this area whether and how the credit should or should not be held, whether duplicate credits are allowed, and whether the credit is rollable.

Credit Rule Hold Types

In your credit rule action, you can specify that credits be held in particular situations. For example, you can place credits that are above a certain amount on hold so they can be manually reviewed before they are processed. Held credits are allocated according to their release date, rather than the compensation date of the associated transaction. When a credit is held, the release date, if specified, sets the compensation date to be the same. If the release date of a held credit is within the processing dates of a position assignment, the credit is released. This happens even if the credit's compensation date is outside the position assignment's effective dates.

i Note

If a credit is held with an offset (some number of periods relative to the current period), the release date is set to the last day of the offset period.

If the compensation date of a transaction is outside the position assignment's credit dates but within the processing date, credits are not generated. However, if an existing credit's compensation date is within the position assignment's processing date, the credit is used in calculation processing. When you create a credit rule, you choose one of the following for the hold type of the credits that rule creates.

Hold Types in Credit Rules:

| Hold Type | Description |
|---------------------|---|
| Release Immediately | Default setting. Credits are available immediately. |
| Indefinite | Credits are held until manually released. Use this setting if you need to review held credits before they are included in compensation calculations. An indefinite hold generates credits with a null release date and compensation date set to End Of Time. |
| Period Type | Choose the kind of period (such as month, quarter, or year) and the offset. The offset is the number of periods relative to the current period (in which the rule is run and the credit is created) for which the credit should be held. For example, if the offset is 2, the credit release date is set for 2 months from the month the credit is created. Note: If a credit is held with an offset, the release date is set to the last day of the offset period. If you set the offset to zero (0), the credit is available for the current period. There is a subtle difference between "release immediately" and a period offset of zero: <ul style="list-style-type: none">• If the credit is released immediately, the credit's compensation date is the same as that of the associated transaction.• If the period offset is zero, the credit's compensation date is the same as the release date, which is the end of the current period. |
| Specific Period | Choose a specific named period, such as January 2008. The release date is set as the last date of this period. The credit is processed by any calculation run for this period. |

Duplicate Credits

When you create credit rules, you specify how the rule handles duplicate credits. A duplicate credit is defined as one that has certain fields of the logical key that match an existing credit, and is based on the same source as the existing credit.

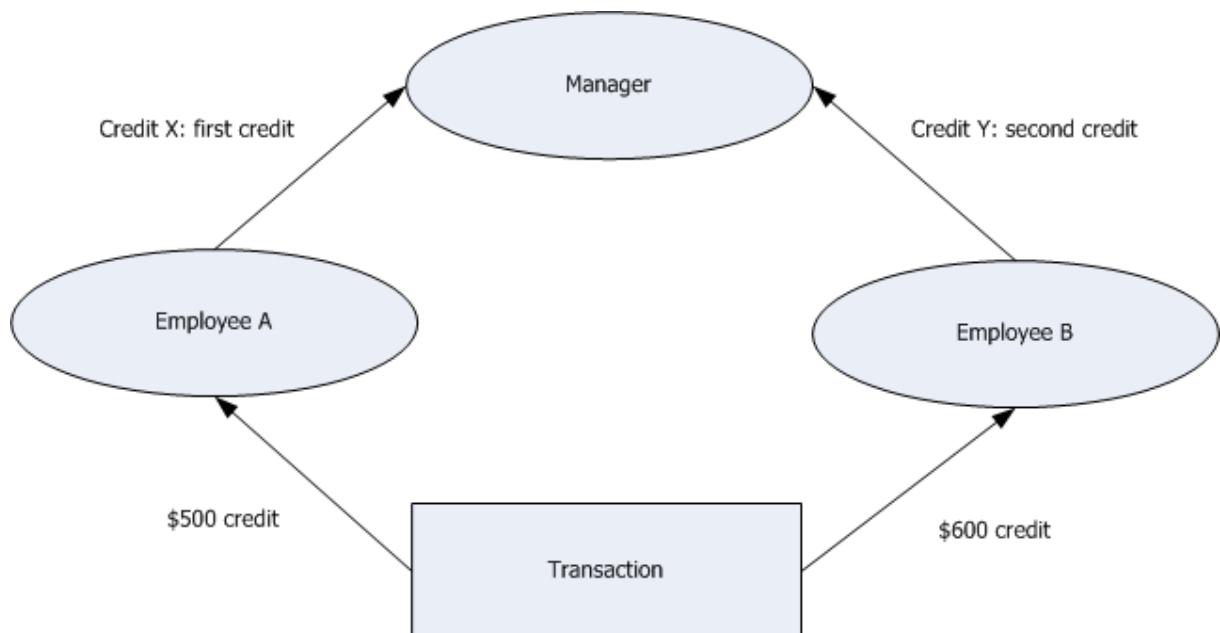
i Note

For a transaction credit, the logical key includes the fields for the transaction, position, payee, credit type, and IsHeld (Ever Held) field in Credits workspace), which can be either true or false/enabled or disabled. For an order credit, the logical key includes the fields for sales order, position, payee, credit type, IsHeld (Ever Held), and credit name (if the name is not null)

- Position/Payee
- Order, Txn
- Credit Type
- Credit Id
- Held Status

The following figure shows an example of the results of allowing or disallowing duplicate credits. Assume that in your company, a manager receives rolled credit from two employees. For a particular transaction or order, Employee A receives \$500 direct credit and Employee B receives \$600 direct credit for the same order. During a calculation run, a rolled credit, Credit X, is created for the manager. Then when the second employee is processed, Credit Y is evaluated to determine if it is a duplicate.

- If duplicate credits are allowed by the credit rule, then the total amount of \$1100 rolls up to the manager. Credit X is modified only if it rolls from the same source (Employee A). However, because it rolls from another source (Employee B), the manager gets two credits.
- If duplicate credits are not allowed, then when Credit Y is evaluated and determined to be a duplicate, it is not created. The manager receives either \$500 or \$600, depending on which employee is processed first.



This example is for credits based on transactions. For credits based on orders, the processing of duplicate credits is slightly different.

i Note

The rolled credit rule illustrated above is contained in the compensation plan for the manager position.

Duplicate Credits and Transaction Credit Rules

When creating a transaction credit rule (either direct or rolled), you can specify true or false in the [Allow Duplicates](#) field in the [Actions](#) area.

- If you specify true, duplicate credits are allowed and credits are not evaluated to determine if they are duplicates.
- If you specify false, the credit is evaluated to determine whether it is a duplicate. If it is a duplicate, the new credit is not created nor is the original credit modified.

You can also enter any field with a Boolean value (true or false) or create an inline formulaic expression that evaluates to a Boolean value. If the field or formulaic expression is false for the new credit, it is considered a duplicate and is not created.

Duplicate Credits and Order Credit Rules

When creating an order credit rule (either direct or rolled), you specify how the rule handles duplicate credits by selecting an option from the Allow Duplicates drop-down in the Actions area. The available options are as follows:

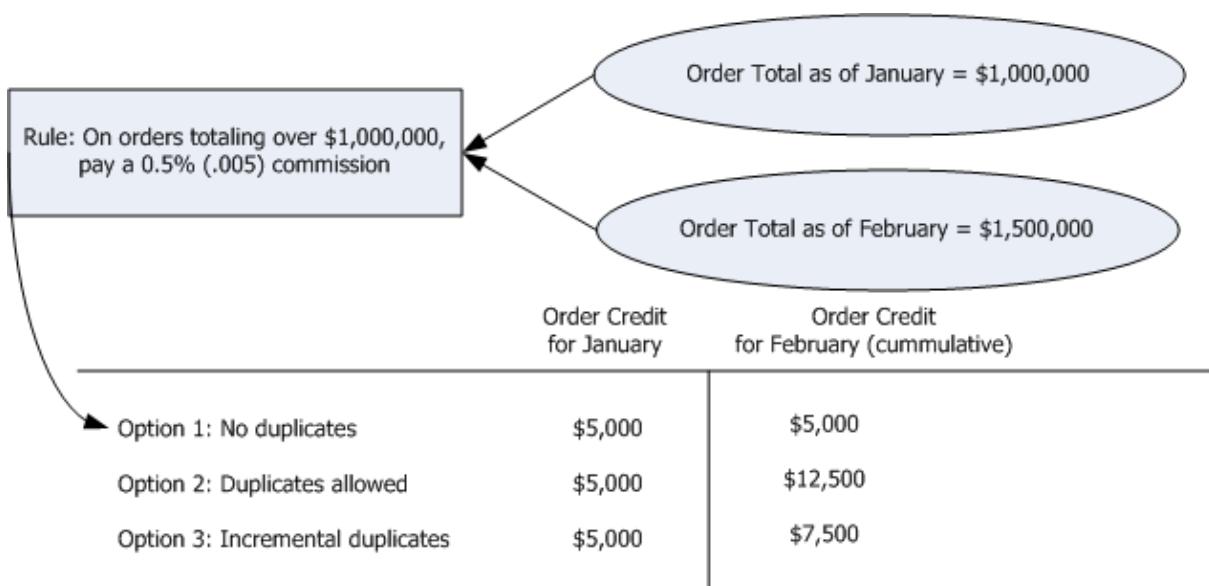
- **No Duplicates** - Prevents duplicate credits from being created.
- **Duplicates Allowed** - Allows duplicate credits to be created. Does not differentiate if the credits are created in different periods.
- **Incremental Duplicates** - Operates differently depending on whether or not the period of the duplicate is the same as that of the existing credit.

If the periods are the same, the original credit is modified by the amount of the duplicate credit. If the periods are different, Commissions creates an incremental order credit. An incremental order credit is an order credit whose value is the difference between the current order credit value and the sum of previous, duplicate order credits. An incremental order credit is generated from an order credit rule that specifies to create incremental credits when duplicate credits occur.

i Note

Allowing incremental credits does not affect duplicate order credits that are in the same period.

The following example illustrates the possible results for duplicate order credits that are created in different periods. Assume that your company has a special incentive for large orders that gives a 0.5% (.005) bonus. In January a particular order is over \$1 million, and a \$5,000 credit is allocated. In February, the same order is now over \$1.5 million, and a \$7,500 total credit is allocated. The following figure shows how different settings for handling duplicate credits affect results.



The three possible outcomes for this example are as follows:

- **No duplicate credits allowed** - Commissions does not add credits for the same order, and the initial \$5,000 credit remains. Commissions generates an error message and do not generate the duplicate credit.
- **Allow duplicate credits** - Commissions creates a credit in February for \$7,500, making two credits that total \$12,500. Since these credits are duplicates except for their periods, the additional credit is created.
- **Generate an incremental order credit** - Commissions adds the difference between the total credit and the amount already credited and a credit for \$2,500 is created in February.

8.3 Creating a Credit Rule

This chapter covers the following topics which include creating Rolled Order Credit Rule, Direct Order Credit Rule, Rolled Transaction Credit Rule, Direct Transaction Credit Rule.

Related Articles

- [Creating a Rolled Order Credit Rule \[page 150\]](#)
- [Creating a Direct Order Credit Rule \[page 152\]](#)
- [Creating a Rolled Transaction Credit Rule \[page 154\]](#)
- [Creating a Direct Transaction Credit Rule \[page 157\]](#)

8.3.1 Creating a rolled Order Credit Rule

A rolled order credit rule generates a credit based on a rollable order credit.

To create a rolled order credit rule:

1. Click [Rules](#) from the [Plan Data](#) menu.
2. Click [Add \(new\)](#) and select credit rule from the drop-down list In the [Rules](#) workspace. The [New Credit Rule](#) dialog opens.
3. Select a different calendar and specify new effective dates in the [New Credit Rule](#) dialog if required, and then click [Ok](#). This displays the [Credit Rule](#) editor.
4. Enter a name for the rule in the [Details](#) panel. Rules are identified by their names in the [Plan](#) workspace and in queries.
5. (Optional) Type rule's description.
If your organization has created and implemented business units, you can assign this credit rule to a business unit by selecting from the Business Units drop-down. You can only select a business unit to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
6. Select [Order](#)(Credit based on a rolled order credit) as the source for the rule. The [Credit Rule](#) editor changes to reveal the fields for order credit rules.
7. (Optional) Specify the following in the Filters area:

| Field | Description |
|-----------|---|
| Condition | Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |
| roll Type | <p>(Required) Specify what roll type(s) by which the incoming credits are available. To specify multiple roll types, select multiple, and from the Multiple dialog specify the roll types, and click OK.</p> <p>Note: The roll Type option is what makes the rule a rolled credit rule instead of a direct credit rule.</p> |

8. Specify the following in the [Actions](#) area:

| Field | Description |
|-------------|--|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. This is the credit name. |
| Credit Type | <p>Select the type of credit that the rule generates. The pre-defined credit types are Commission, Order, Quota, and Revenue, but additional credit types can be created and these pre-defined credit types can be deleted.</p> <p>See the Commissions Administrator Help for information on creating custom credit types.</p> |

| Field | Description |
|------------------|---|
| Hold Type | To hold the credit, specify what type of hold and when to release the credit. The default is release immediately (credits are not held and are available immediately), but you can also select Indefinite, Period Type, and Specific Period. An indefinite hold generates credits with a null release date and compensation date set to End Of Time. A hold with an offset has a release date set to the end date of the period. |
| Allow Duplicates | (Optional) Select one of the following options: <i>No Duplicates</i> , <i>Duplicates Allowed</i> , or <i>Incremental duplicates</i> . |
| Rollable | (Optional) To make the created credits available to other positions as rolled credits, select the <i>Rollable</i> check box. Note: In most cases, rolled credits are not marked as rollable. |
| roll Date | Enabled when the <i>Rollable</i> option is selected. |
| Amount | Specify the value to be assigned to this credit (the default is Transaction.Value). You can directly enter a literal amount, point to an amount stored in Commissions (value), or copy an amount from the database (data field). You can also use an inline formulaic expression or a named formula. |
| Max Amount | (Optional) To establish a maximum allowable amount of the credit, specify that maximum value here. If the credit calculation yields an amount more than the specified max amount, SAP Commissions generates a credit with a value equal to the max amount specified here. Once this maximum amount is reached, the credit is no longer incremented. This property is only available for indirect (rolled) credits. |

9. (Optional) click this node () to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
10. Click *Add New Output* and specify information for the new action to add another action to the rule. If you have multiple actions in a rule, the one rule generates multiple outputs.
11. Click *Save* to save the rule.

8.3.2 Creating a Direct Order Credit Rule

A direct order credit rule generates credit based on an order instead of a single transaction.

To create a direct order credit rule:

1. Click *Rules* from the *Plan Data* menu.
2. Click *Add (new)* and select *Credit Rule* from the drop-down list in the *Rules* workspace. This displays the **New Credit Rule** dialog.
3. Select a different calendar and specify new effective dates in the *New Credit Rule* dialog and then click *Ok*. This displays the *Credit Rule* editor dialog.
4. Type a name for the rule in the detail pane. Rules are identified by their names in the *Plan* workspace and in queries.
5. (Optional) Type rule description.
If your organization has created and implemented business units, you can assign this credit rule to a business unit by selecting from the Business Units drop-down. You can only select a business unit to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
6. Select *Order*(Credit based on the entire Order) as a source for the rule. The *Credit Rule* editor changes to reveal the fields for order credit rules.
7. (Optional) Specify the following in the *Filters* area:

| Field | Description |
|-----------|---|
| Condition | Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. For example, specify two formulas: one that calculates the number of golf putters sold on an order, and a second formula that calculates the number of golf drivers sold on an order. Make the condition to the rule be that each formula must result in greater than 1. |
| Roll Type | Do not specify a roll type for a direct credit rule; you do so for rolled credit rules. |

8. In the *Actions* area, specify the following:

| Field | Description |
|-------------|---|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. This is the credit name. |
| Credit Type | Select the type of credit that the rule generates. The pre-defined credit types are Commission, Order, Quota, and Revenue, but additional credit types can be created and these pre-defined credit types can be deleted. See the Commissions Administrator Help for information on creating custom credit types. |

| Field | Description |
|------------------|--|
| Hold Type | To hold the credit, specify what type of hold and when to release the credit. The default is Release Immediately (credits are not held and are available immediately), but you can also select Indefinite, Period Type, and Specific Period. |
| | An indefinite hold generates credits with a null release date and compensation date set to End Of Time. A hold with an offset has a release date set to the end date of the period. |
| Allow Duplicates | Select one of the following options: No Duplicates, Duplicates Allowed, or Incremental duplicates. |
| Rollable | (Optional) To make the created credits available to other positions as rolled credits, enable the Rollable option. |
| Roll Date | Enabled when the Rollable option is selected. |
| Amount | Specify the value to be assigned to this credit (the default is Transaction.Value). |
| | You can directly enter a literal amount, point to an amount stored in Commissions (value), or copy an amount from the database (data field). You can also create an inline formulaic expression or a named formula. |

9. (Optional) Click the *node* (Ξ) to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
10. Click *Add New Output* and specify information for the new action to add another action to the rule. If you have multiple actions in a rule, the one rule generates multiple outputs.
11. Click *Save*.

8.3.3 Creating a Rolled Transaction Credit Rule

A rolled transaction credit rule generates a credit based on a transaction credit that rolls to the position according to the specified roll type. Rolled transaction credits rules always use a transaction as their source.

i Note

Do not use `sourceCredit.Relationship.Version()` in a rolled credit rule. The direct credit that generated the rolled credit passes the roll date, which determines the relationship version.

To create a rolled transaction credit rule:

1. Click *Rules* from the *Plan Data* menu.
2. Click *Add (new)* and select *Credit Rule* from the new drop-down list in the *Rules* workspace. This displays a *New Credit Rule* dialog.
3. Select a different calendar and specify new effective dates in the *New Credit Rule* dialog and then click *Ok*. This displays the *Credit Rule* editor.
4. Type a name for the rule in the detail pane. Rules are identified by their names in the *Plan* workspace and in queries.
5. (Optional) Type rule description.
 - o If your organization has created and implemented business units, you can assign this credit rule to a business unit by selecting from the business units drop-down. You can only select a business unit to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
6. Accept the default Transaction as the Source for the credit rule.
For rolled transaction credit rules, do not enable the Pre-Assigned option.
7. (Optional) Specify the following in the *Filters* area:

| Field | Description |
|-----------|---|
| Condition | Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |
| Territory | Specify one or more categories, classifiers, territories, using automatic matching or the Formula field button. Commissions evaluates only the transactions that match the specified object or objects. You can also specify a territory variable, and then customize the territory at different assignment levels. |
| Roll Type | (Required) Specify the roll type(s) by which the incoming credits are available. To specify multiple roll types, select Multiple, and from the Multiple dialogs add and remove roll types as needed, and click OK. Note: The Roll Type option is what makes the rule a rolled credit rule instead of a direct credit rule. |

8. 1. Specify the following in the *Actions* area:

| Field | Description |
|-------------|--|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. This is the credit name. |

| Field | Description |
|------------------|--|
| Credit Type | Select the type of credit that the rule generates. The pre-defined credit types are Commission, Order, Quota, and Revenue, but additional credit types can be created and these pre-defined credit types can be deleted. |
| Hold Type | <p>To hold the credit, select the type of hold and when to release the credit. The default is Release Immediately (credits are not held and are available immediately), but you can also select Indefinite, Period Type, and Specific Period.</p> <p>An indefinite hold generates credits with a null release date and compensation date set to End Of Time. A hold with an offset has a release date set to the end date of the period.</p> |
| Allow Duplicates | <p>To indicate that duplicate credits can be created, specify true. Otherwise, accept the default of False.</p> <p>Allowing duplicates indicates that a position can receive credits of the same credit type and hold status as the original credit for the same transaction.</p> <p>Note: If credits are from different transactions, they are not considered duplicate credits and are therefore not affected by this setting.</p> |
| Rollable | <p>To make the created credits available as rolled credits to other positions, select the Rollable check box.</p> <p>Note: In most cases, rolled credits are not marked as rollable.</p> |
| Amount | <p>Specify the value to be assigned to this credit (the default is Transaction.Value).</p> <p>You can directly enter a literal amount, point to an amount stored in Commissions (value), or copy an amount from the database (data field). You can also create an inline formulaic expression, or a named formula.</p> |

| Field | Description |
|------------|---|
| Max Amount | <p>To establish a maximum allowable amount of the credit, specify that maximum value here. If the credit calculation yields an amount more than the specified max amount, Commissions generates a credit with a value equal to the max amount specified here. Once this maximum amount is reached, the credit is no longer incremented. This property is only available for indirect (rolled) credits.</p> <p>If Allow Duplicates is set to true, this Max Amount applies to the total of all duplicate credits. For example, if a credit rule generates two duplicate credits of \$100 each and the Max Amount is set at \$150, one of the credits is reduced to \$50.</p> |

9. (Optional) Click this node () to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
10. Click [Add New Output](#) and specify information for the new action to add another action to the rule. If you have multiple actions in a rule, the one rule generates multiple outputs.
11. Click [Save](#).

8.3.4 Creating a Direct Transaction Credit Rule

A direct transaction credit rule generates a credit based on a transaction.

To create a direct transaction credit rule:

1. Click [Rules](#) from the [Plan Data](#) menu.
2. Click [Add \(new\)](#) and select [Credit Rule](#) from the drop-down list in the Rules workspace. This displays the **New Credit Rule** dialog.
3. Select a different calendar and specify new effective dates in the **New Credit Rule** dialog.
4. Click [Ok](#). The [Credit Rule](#) editor opens.
5. Enter a name for the rule in the [Details](#) panel. The rule name(s) is the way rules are identified in the [Plan](#) workspace and in queries.
 - If your organization has created and implemented business units, you can assign this credit rule to a business unit by selecting from the business units drop-down. You can only select a business unit to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
6. (Optional) Type a text description of the rule.
7. Accept the default, Transaction(Credit based on an individual Transaction), as the source for the credit rule.
8. Enable the Pre-Assigned option(Credit if they are identified on the Transaction) if transactions are pre-assigned to participants.

When the Pre-Assigned option is enabled, Commissions evaluates only those transactions that specify position assignment information (in addition to any other filtering imposed by the rule). If the position name, participant, and title fields on a transaction are all null the Pre-Assigned option is ignored. The pre-assigned option can be combined with the option to filter by territory or category, which results in the processing of just those pre-assigned transactions that match one the specified territory/category information. See the *Commissions Administrator Help* for details about how these transactions are processed.

9. (Optional) Specify the following in the *Filters* area:

| Field | Description |
|-----------------|---|
| Condition | Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |
| Territory | Specify one or more categories, classifiers, territories, using auto-matching or the Formula field button. Commissions evaluates only the transactions that match the specified object or objects. You can also specify a territory variable, and then customize the territory at different assignment levels. |
| Rolling through | Do not select a roll type for a direct credit rule. |

10. Specify the following in the *Actions* area:

| 11. Field | Description |
|----------------|---|
| Credit Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. This is the credit name. |
| Credit Type | Select the type of credit that the rule generates. The pre-defined credit types are Commission, Order, Quota, and Revenue, but additional credit types can be created and these pre-defined credit types can be deleted. |
| Hold Condition | To hold the credit, specify what type of hold and when to release the credit. The default is Release Immediately (credits are not held and are available immediately), but you can also select Indefinite, Period Type, and Specific Period. An indefinite hold generates credits with a null release date and compensation date set to End Of Time. A hold with an offset has a release date set to the end date of the period. |

| Field | Description |
|---------------------|--|
| Duplication Formula | To indicate that duplicate credits can be created, specify True. Otherwise, accept the default of False. Allowing duplicates indicates that a position can receive credits of the same credit type and hold the status that is the same as the original credit for the same transaction. Note: If credits are from different transactions, they are not considered to be duplicate credits and are therefore not affected by this setting. |
| Rollup Credits? | To make the created credits available to other positions as rolled credits, enable the rollable option. |
| Amount | Specify the value assigned to this credit (the default = Transaction.Value). You can directly enter a literal amount, point to an amount stored in Commissions (value), or copy an amount from the database (data field). You can also create an inline formulaic expression, or specify a named formula. |

12. (Optional) Click this node () to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
13. Click [Add New Output](#) and specify information for the new action to add another action to the rule. If you have multiple actions in a rule, the one rule generates multiple outputs.
14. Click [Save](#).

9 About Measurement Rules

There are two kinds of measurement rules: primary measurement rules, and secondary measurement rules. The primary measurement rules aggregate the credits or other items for position assignments. Typically, aggregating credits involves summing the monetary value of credits. However, you can also define measurement rules to aggregate credits in other ways, such as by different product lines and by counting the number of units sold. Secondary measurement rules aggregate primary measurements or perform calculations based on formulas, formulaic expressions, values, or data fields. You select primary measurements and values from the list of legal moves when you create the secondary measurement rule. To create a self-reference, you must save the rule first. A self-reference is when you refer to the output of the rule in the rule itself.

Related Articles

- [Creating Measurement Rules Overview \[page 160\]](#)
- [Creating a Primary Measurement Rule \[page 161\]](#)
- [Creating a Secondary Measurement \[page 162\]](#)

9.1 Creating Measurement Rules Overview

When you create a measurement rule, you must define the input or source. If you choose credits, the rule created is a primary measurement rule. If you choose other performance measures, the rule created is a secondary measurement rule. You can limit which incoming credits are evaluated by a primary measurement rule by filtering on territories, categories, or classifiers. For example, if you want a measurement rule to evaluate only credits that are based on sales made through the distributor channel, you can create a condition to establish that requirement—Territory: Distributor. Finally, when you create a measurement rule, you define one or more actions of the rule. The selection of available actions displayed depends on what you selected as input to this rule. You name the output of the action; the output is an aggregate of the incoming credits and their values (primary measurement) or an aggregate of other non-credit-based values (secondary measurement).

i Note

You can include both order and transaction credits in a measurement. However, if you do so, you cannot use a filter on the transaction credit.

9.2 Creating a Primary Measurement Rule

The input to a primary measurement rule is credited. The output is a named measurement with the value of the aggregate of the credit amounts that you specify.

To create a primary measurement rule:

1. Click [Rules](#) to go to the *Rules* workspace from the *Plan Data* menu
2. Click [Add \(new\)](#) and select the *Measurement Rule* from the *New* drop-down list in the Rules workspace. The *New Measurement Rule* dialog opens.
3. Select a different calendar and specify new effective dates in the *New Measurement Rule* dialog.
4. Click [Ok](#). The *Measurement Rule* editor opens.
5. Enter a name for the primary measurement rule in the detail pane. Rule names display in the *Plan* workspace and in queries.
6. (Optional) Enter a text description for the rule.
 - o If your organization has created and implemented business units, you can assign this rule to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
7. Select [Credits\(A Rule that Sums Up My Credits\)](#) as the source.

i Note

After you save the primary measurement rule, you cannot change the source.

8. (Optional) specify the following in the Filters area:

| Field | Description |
|-----------|--|
| Condition | Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |
| Territory | Specify either a category or a territory. The Commissions only evaluates the transactions that match the specified territories or categories. You can also specify a territory variable, and then customize the territory at different assignment levels (position, title, plan, and variable). Note: To get the category, click the Formula field button, then type Cat to bring up a list of all the categories. |

9. In the Actions area, specify the following:

| Field | Description |
|--------------|--|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. |
| Unit Type | Specify the unit type of the created measurement. See the Commissions Administrator Help for more information on unit types. |
| Increment by | <p>The value, or the reference to the value, to associate with this measurement. Each credit's contribution value is the increment amount.</p> <p>You can enter an explicit amount (literal), use the result of a formula, extract an amount stored in SAP Commissions (periodic named value), or copy an amount from the database (data field).</p> |

10. Click [Add](#) Output and specify information for the new action to add another action to the rule. If you have multiple actions in a rule, the one rule generates multiple outputs.
11. Click [Save](#) to save the rule.

9.3 Creating a Secondary Measurement Rule

A secondary measurement rule generates a secondary measurement, which can be an aggregate of primary measurements or the result of a formula.

i Note

During the reward stage, SAP Commissions does not load a position assignment to calculate its secondary measurement if there is no credit in the current period (even if there are values from prior periods). The secondary measurement rule, in this case, is not looking to prior periods for dependent data. To resolve this issue, you must create a secondary measurement rule on the same plan and include an impossible condition (such as 1=2). This rule does not fire, but it does cause the position assignment to be loaded. With the position assignment loaded, the prior period data upon which the original secondary measurement rule depends is included.

To create a secondary measurement rule:

1. Click [Rules](#) to go to the Rules workspace.
2. Click [Add \(new\)](#) and select Measurement Rule from the New drop-down list. The New Measurement Rule dialog opens.
3. Select a different calendar and specify new effective dates in the [New Measurement Rule](#) dialog
4. Click [Ok](#). The [New Measurement Rule](#) editor opens.

5. Enter a name for the secondary measurement rule in the detail panel. The Rule names display in the Plan workspace and in queries.
6. (Optional) Enter a text description of the rule.
 - If your organization has created and implemented business units, you can assign this rule to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
7. Select *Other Performance Measures* as the source (A Rule that Calculates other Key Performance Measures). The Measurement Rule editor changes to reveal the fields for secondary measurement rules.

i Note

After you save the secondary measurement rule, you cannot change the source.

8. (Optional) Specify the following in the Filters are:

| Field | Description |
|-----------|---|
| Condition | Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |

9. specify the following in the actions are:

| Field | Description |
|--------------|---|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. |
| Unit Type | Specify the unit type of the created measurement. See the Commissions Administrator Help for more information on unit types. |
| Increment by | Specify the value, or the reference to the value, to associate with this measurement. You can enter an explicit amount (literal), use the result of a formula, extract an amount stored in Commissions (periodic named value), or copy an amount from the database (data field). |

10. (Optional) click the node to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
11. Click *Add New Output* and specify information for the new action to add another action to the rule. If you have multiple actions in a rule, the one rule generates multiple outputs.
12. Click *Save* to save the rule.

Legal Move Editor

The Calculation Result function is introduced in the *Condition* and *Measurement Amount* legal move editor windows of Secondary Measurement Rule.

10 Incentive Rules Overview

Incentive rules calculate the earnings of your sales force. They can be simple, using a single measurement as input and producing a single output; or complex, using multiple inputs and producing multiple outputs. When creating incentives rules, you need to ask the following questions:

- What information is required to calculate the incentive? For example, is the incentive compensation based on a single measurement that represents a salesperson's sales for a period of time, or is it based on the individual credits allocated to that salesperson.
- What output information is required for reporting? For example, is a single amount representing the compensation to be paid adequate, or do the individual outputs, known as commissions, to be reported based on individual inputs.
- What are our incentives based on?
- If the incentive is to be calculated based on a rate, where does the rate come from? For example, is the rate based on a flat rate of 10% or is it based on an incremental, stepped set of rates from a rate table.

The first two questions lead us to the fact that there two basic types of incentive rules: those that calculate incentives only (basic incentive rules) and those calculate incentives and commissions (commission rules). To answer the first question, you need to look at the source for the calculation. Following are several common scenarios:

- The sales person was credited with 500 sales in a quarter, and those credited sales need only to be aggregated (added up) into a single primary measurement. That single measurement can be used to calculate the incentive. This improves performance but the detail needed for reporting is lost.
- The sales person was credited with 500 sales in a quarter, but instead of aggregating those credits into a single measurement the commission on each sales needs to be calculated separately. The sum of these measurements is then used to calculate the incentive. Performance is diminished, but the detail needed for reporting is retained.

Having a reporting requirement is the most common reason to use commission level detail, but there are other factors. Consider the following examples:

- Not every credit is to be used in the incentive value calculation. For example, of the sales person's 500 credit sales, only 200 of them meet the additional requirement that the credit is used only if the sale exceeded \$500.
- Credit values do not directly correlate to the incentive value calculation. For example, the salesperson's incentive is based on 80% of the sales value, not 100%.
- Attributes other than the amount are used in the incentive value calculation. For example, the value to be used in the incentive value calculation is stored in a generic attribute.

The various scenarios and examples discussed above are summarized in the following table. In addition to the above scenarios, scenarios including input from secondary measurements, incentives, and a formula are included. Incentives calculated based on a commission are commonly called bonuses.

Incentive Rule Inputs and Outputs

| Result Type | Input Source | Output |
|-----------------|-----------------------|-------------|
| Incentives Only | 1 primary measurement | 1 Incentive |

| Result Type | Input Source | Output |
|----------------------------|---|---------------------------------|
| Incentives Only | 5 secondary measurements | 1 Incentive |
| Incentives Only | 3 incentives | 1 incentive |
| Incentives Only | 500 credits from 1 primary measurement | 1 incentive |
| Incentives and Commissions | 500 credits from 1 primary measurement | 1 incentive and 500 commissions |
| Incentives and Commissions | 200 credits from 1 primary measurement, which has 500 credits | 1 incentive and 200 commissions |
| Incentives and Commissions | A formula | 1 incentive |

When you create an incentive rule, the result type specified (Incentives Only or Incentives and Commissions) determines whether the rule is a general incentive rule or one that includes commissions. A commission is based on each credit that feeds into a measurement, and the incentive for that kind of rule is an aggregate value of all the per-credit commissions.

i Note

To create a self-reference, you must save the rule first. (Self-references are references to the output of the rule from within the rule; the reference is to the different period-based version of the rule's output.)

10.1 About Incentive Rules

When you first navigate to the *Incentive Rule* editor, the editor defaults to the criteria for a basic incentive rule, which is the input source of Measurement and result type of Incentives Only. The result type specified for the rule (incentives only or commissions) determines whether it is a general incentive rule or one that includes commissions. Basic incentive rules are sometimes called aggregate credit commission rules, aggregate credit rules, or bulk credit rules. The input to an incentive rule is a measurement or a formula; the output of an incentive rule is a named incentive with a specific value and an associated period type. The output period type indicates when the incentive is available for deposit (for example, the end of the current month or quarter).

Basic incentive rules require less processing time but do not provide the results detail of commissions calculated for each credit. Basic incentive rules calculate incentives directly from the measurement, without calculating intervening commission objects. When processing incentive rules during the Reward stage of the calculation, Commissions compares performance measurements with targets and quotas for each position assignment assigned to the plan.

10.2 Commission Rules

A commission rule is based on each credit that feeds into a measurement, and the incentive for that kind of rule is an aggregate value of all the per-credit commissions. The result type of commission rules is Incentives and Commissions. There is no Input Source. Commission rules (individual credits rules) calculate a value for each credit of the measurement called a commission. Commission result objects can be viewed in the Commission workspace. Commission objects are used by the rule to calculate incentives. You should use commission rules in the following cases:

- Rates for each product are different.
- There is a special commission for single credits over a specified amount.
- The measurement is not based on the sum of credit values (for example, multiplies the credit values by 25%), but you want to base the commission amount on the actual credit value.

10.3 Result Type and Filters in Incentive Rules

When you create incentive rules, the result type specified (incentives only or incentives and commissions) determines whether the rule is a general incentive rule or one that includes commissions. Unlike credit rules, measurement rules, and deposit rules, you do not directly specify a “Source” for incentive rules in the *Incentive Rule* editor. Instead, the input source for these rules is specified in the filters for commission rules and directly in the actions for incentive rules. You can, however, limit the data evaluated by both incentive and commission rules by specifying filter conditions.

The filters area for basic incentive rule is similar to the result type and filters area for a commission rule (incentives and commissions input), but you can only specify a condition for a basic incentive rule. In the filters area fields you can do the following:

- **Measurement**—the name of the attainment primary measurement on which this rule operates. The measurement is the input to this rule. The list contains the primary measurements defined in the measurement rules.
- **Input Period Type**—the measurement period that represents the set of credits for the calculation.
- **Period Offset**—a number used to offset the measurement period to a relative, prior period.
- **Input From**—indicates which measurement to use. The default setting is from current position, but you can use a measurement from another position by selecting another position. If you select another position, you must select a relationship.
- **Relationship**—if the Input From measurement is from another position, select the roll type for that relationship.
- **Condition**—Enter a simple or complex expression of conditions that must be met for the rule to be evaluated as true and fired.

10.4 Tiered Rate Tables

The input to basic incentive rules can be a rate table, a flat rate, or no rate, depending on your requirements. Rate tables can be processed as either tiered or straight rate tables. To process a rate table as tiered based on attainment, the following must be true:

- The value in the *Quota* field must have a currency unit type.
- The value in the measurement must have currency unit type.
- The rate table must be created with both input type and return type set to the percentage.

The following table illustrates this last point. If the input type and return type are not set correctly, the rate table is not processed as a tiered rate table.

Rate Table Tiering

| Input | Return Type | Tiered/Not Tiered |
|-------|-------------|-------------------|
| % | % | Tiered |
| % | \$ | Not Tiered |
| \$ | % | Not Tiered |

To process a rate table as tiered based on source, the following must be true:

- The rate table input type must match the measurement unit type.
- The rate table return type must match the incentive unit type.

If the input type and return type are not set correctly, the rate table is not processed as a tiered rate table.

10.5 Straight Rate Tables

To process a rate table as straight not using Interpolate, the following must be true:

- The measurement and quota should have the same unit type.
- The rate table input type must be set to percentage.
- The rate table input type must match the Incentive unit type.

To process a rate table as straight using Interpolate, the following must be true:

- The measurement and quota should have the same unit type.
- The rate table input type must be set to percentage.
- The rate table input type must match the Incentive unit type.

10.6 Creating an Incentive Rule

The general incentive rule calculates an incentive based on a measurement or a formula. You can optionally specify a flat rate to apply to the incentive amount. If you add an action to a basic or bonus incentive rule, you

can add an incentive or bonus action. There is no calculation difference between the two types of actions; the difference is that the bonus action has quota and attainment fields used for reporting purposes. The output of a general incentive rule is an incentive object.

To create a general incentive rule:

1. Click *Rules* from the *Plan* Datamenu.
2. Click *Add (New)* and select *Incentive Rule* from the new drop-down list. This displays the *New Incentive Rule* dialog.
3. Select a different calendar and specify new effective dates in the *New Incentive Rule* dialog.
4. Click *Ok*. This displays the *Incentive Rule* editor.
5. Enter a name for the incentive rule in the *Details panel*. Rule names are the way rules are identified in the *Plan* workspace and in queries.
6. (Optional) Enter a text description of the rule.
7. Accept the default, Incentives Only, as the Result Type for the rule.
8. (Optional) Add a Condition to the rule, by specifying a formulaic expression, a named formula, or a comparison of data fields.
9. Create a general incentive rule action by specifying the following in the Actions area:

| Field | Description |
|--------------------|---|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. |
| Output Period Type | Select the period type of the created incentive. |
| Unit Type | Select the unit type of the created incentive. See the Commissions Administrator Help for more information on unit types. |
| Input Source | Select the source for the incentive. The choices are Measurement or Other. |

10. Specify the following if you select Measurement as the Input Source:

| Field | Description |
|-------------------|--|
| Measurement field | In the field next to the Input Source drop-down, select the name of the measurement that is to be used as input to this rule. |
| Input Period Type | Select the period type for the measurement. Be careful to specify the correct period type for the measurement. |
| Period Offset | To specify an offset, enter a positive number. You can use offsets to specify a relative, prior period. Enter the number of periods to go back. For example, to use the April monthly measurement in June, you specify 2 in the offsets field. |

| Field | Description |
|------------------|---|
| Input From | <p>The default setting is the Current Position.</p> <p>Note: Commissions uses only one measurement from one of the subordinate positions, even in cases when there is more than one subordinate position. There is no way to determine which subordinate position's object is supplied to the rule. Because of this uncertainty, only use this rollup feature when there is only one subordinate position specified in the roll relationship.</p> |
| Input Multiplier | <p>Select an input multiplier.</p> <p>If you specify a flat rate, specify the rate in the field to the right of the Input Multiplier drop-down list box.</p> <p>If you specify no rate, specify the amount of the incentive in the field to the right of the Input Multiplier drop-down list box.</p> <p>If you specify the rate table, specify the name of the rate table in the field to the right of the Input Multiplier drop-down list box. Then, specify the quota and attainment period.</p> |
| Quota | <p>Specify a value to be compared to the measurement to determine the attainment percentage (attainment = measurement/quota).</p> <p>You can specify a quota object, a fixed value, or a fixed value variable</p> |
| Attainment | <p>For commission rules that reference a rate table, specify the attainment period.</p> <p>For example, to compare year-to-date measurement (performance) to the annual quota, specify 'r;year' as the period type.</p> |

11. Specify the following if your Input source is Other:

| | |
|--------------|--|
| Other input | Specify the input to the rule. This can be a formula, formulaic expression, or any legal move. |
| Amount field | Enter a value or a formula in the field next to the Input Source drop-down. |

| Other input | Specify the input to the rule. This can be a formula, formulaic expression, or any legal move. |
|------------------|---|
| Input Multiplier | <p>For incentive rules that are not based on a measurement input, you can choose between a flat rate or no rate.</p> <p>If you specify a flat rate, specify the rate in the field to the right of the Input Multiplier drop-down list box.</p> <p>If you specify no rate, specify the amount of the incentive in the field to the right of the Input Multiplier drop-down list box.</p> |

12. To add another action to the rule, click Add New Output and specify the above information for a separate action. If you have multiple actions in a rule, the one rule generates multiple outputs.
13. Click the *node* (☒) to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
14. Click *Save* to save the rule.

The general incentive rule calculates an incentive based on a measurement or a formula. You can optionally specify a flat rate, stepped rate and straight rate to apply to the incentive amount. If you add an action to a basic or bonus incentive rule, you can add an incentive or bonus action. There is no calculation difference between the two types of actions; the difference is that the bonus action has quota and attainment fields used for reporting purposes.

To create a general incentive rule:

1. Click *Rules* from the PLAN menu.
2. Select *Incentive Rule* from the drop-down list. The *New Incentive Rule* dialog opens.
3. Select a different calendar and specify new effective dates in the *New Incentive Rule* dialog.
4. Click *Ok*. The *Incentive Rule editor* opens.
5. Enter a name for the incentive rule in the *Details* panel. Rule names are the way rules are identified in the *Plan* workspace and in queries.
6. (Optional) Type a text description of the rule.
 - ○ If your organization has created and implemented business units, you can assign this rule to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
7. (Optional) In the Filtering Condition(s), add a Condition to the rule, by specifying a formulaic expression, a named formula, or a comparison of data fields.
8. Accept the default, Incentives only, as the Calculate for the rule.
9. In "What measures are you incenting on?", create by specifying the following:

| Field | Description |
|--------------------|--|
| Achievement Source | Select the source for the incentive. The choices are Measurement or Custom. Default is Measurement and Custom can be used using a fixed value, fixed value variable and formula. |

| Field | Description |
|-------------------|--|
| Measurement Field | Select the name of the measurement that is to be used as input to this rule. |
| Offset | To specify an offset, enter a positive number. You can use offsets to specify a relative, prior period. Enter the number of periods to go back. For example, to use the April monthly measurement in June, you specify 2 in the offsets field. |
| Period Source | The default setting is Direct Note: Commissions Manager uses only one measurement from one of the subordinate positions, even in cases when there is more than one subordinate position. There is no way to determine which subordinate position's object is supplied to the rule. Because of this uncertainty, only use this rollup feature when there is only one subordinate position specified in the roll relationship |
| Source Period | Select the period type for the measurement. It can be a month, quarter, year, a decade |

10. "How do you want to calculate the incentive rate?", specify the following:

| Field | Description |
|---------------------|---|
| Select Rate | <ul style="list-style-type: none"> • Select the rate type for the incentive. The choices are Stepped Rate, Straight Rate, Flat Rate or No Rate. Default is Stepped Rate • If you specify a flat rate, specify the rate in the field to the right of the select rate drop-down list box. • If you specify no rate, no rate is applied • If you specify stepped rate, specify the rate table in the field to the right of the select rate drop-down list box. • If you specify straight rate, specify the rate table in the field to the right of the select rate drop-down list box. • If Achievement Source is Custom only flat rate and no rate are applicable |
| Interpolate | This function is only applicable for Straight rate. Select the checkbox. |
| Attainment Interval | <p>For commission rules that reference a rate table, specify the attainment period.</p> <p>For example, to compare year-to-date measurement (performance) to the annual quota, specify 'year' as the period type.</p> |

| Field | Description |
|--------------|---|
| Sales Target | Specify a value to be compared to the measurement to determine the attainment percentage (attainment = measurement/quota) You can specify a quota object, a fixed value, or a fixed value variable |
| Based On | Select the choice either Attainment or Source. Source refers to the position source either direct or indirect and Attainment refers to measurement |

"What is the incentive amount?", specify the following:

| | |
|--------------|--|
| Unit Type | Select the unit type of the created incentive. See the Commissions Administrator Help for more information on unit types. |
| Amount field | Select either of 2 choices "Apply Rate to Source" or "Apply Rate to custom formula". Apply Rate to custom formula is applicable only for the stepped rate. |
| Period Type | Select the period type of created incentive |

1. To add another action to the rule, click "Add Another" and specify the above information for a separate action. If you have multiple actions in a rule, the one rule generates multiple outputs.
2. Click the node () to reveal the fields if generic attributes are enabled.. Populate the fields as required for your installation.
3. Click **Save** to save the rule.

Example

Case 1:

Suppose that, Achievement Source (Measurement) = \$220

Rate = Stepped Rate using Rate table having 2% (<=100% attainment) and 4% (>100% attainment)

Based on = Attainment

Sales Target = \$12

Commission = Rate * Achievement Source = 2% * 12 USD = 0.24 USD

Commission = Rate * Achievement Source = 4% * 208 USD = 8.32 USD

Result = 0.24+8.32 = 8.56 USD

Case 2:

Achievement Source (Measurement) = \$220

Rate = Stepped Rate using Rate table having 2% (<=100% attainment) and 4% (>100% attainment)

Based on = Source

Amount (Apply Rate to Custom Formula) = \$12

Commission = Rate * Custom Value = 2% * 15 USD = 0.3 USD

Commission = Rate * Custom Value = 4% * 3,285 USD = 131.4 USD

Result = 131.7 USD

Case 3:

Achievement Source (Measurement) = \$220

Rate = Straight Rate using Rate table having 2% (<=100% attainment) and 4% (>100% attainment)

Based on = Attainment

Sales Target = \$12

Attainment = Measurement / Quota = 220 USD / 12 USD = 1,833.3333333%

Result = 220*4% = 8.8 USD

Case 4:

Achievement Source (Measurement) = \$12

Rate = Straight Rate using Rate table having 2% (<=100% attainment) and 4% (>100% attainment)

Set Interpolate checkbox true

Based on = Attainment

Sales Target = \$12

Attainment = Measurement / Quota = 12 USD / 12 USD = 100%

Result = 0.02 USD (2%)

10.7 Creating a Commission Rule

Commission rules base the incentive amount on attainment performance (the measurement's value compared to the position assignment's quota). Commission rules calculate the incentive amount by multiplying the specified rate by the value of each credit in the specified measurement; the value of the incentive is the sum of each per-credit commission. You can specify the rate to be based on a fixed value, a flat amount, the result of a formula, or a rate table. When you specify a rate table, the rule functions as a step commission.

i Note

The output of a commission rule is commission objects and an incentive object; the incentive object is the aggregate value of all commissions generated by the rule.

To create a commission rule, perform the following:

1. Click *Rules* from the *Plan Data* menu.
2. Click *Add (new)* select *Incentive Rule* from the new drop-down list of the *Rules* workspace. This displays *New Incentive Rule* dialog opens.
3. Select the different calendar and specify new effective dates in the *New Incentive Rule* dialog if required
4. Click *Ok*. This displays the *Incentive Rule* editor.
5. Type a name for the commission rule in the *Details* panel. Rule names are the way rules are identified in the Plan workspace and in queries.
6. (Optional) Type a text description for the rule.
 - If your organization has created and implemented business units, you can assign this rule to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
1. Select the *Result Type* of the rule. For the commission rule, select Incentives and SAP Commissions. The *Incentive Rule* editor changes to reveal the fields for commission rules.
1. Specify the following in the **Filters** area:

| Field | Description |
|-------------------|---|
| Measurement | Specify the name of the attainment primary measurement on which this rule operates. The measurement is the input to this rule. The list contains the primary measurements defined in the measurement rules. |
| Input Period Type | Select the measurement period that represents the set of credits for the calculation. |
| Period Offset | To specify an offset, enter a positive number. You can use offsets to specify a relative, prior period. Enter the number of periods back to go. For example, to use the April monthly measurement in June, you specify 2 in the offsets field. |
| Input From | To use the measurement from another position, specify the input as Another Position. Otherwise, the default setting of Current Position applies. Note: If Commissions uses only one measurement from one of the subordinate positions, even in cases when there is more than one subordinate position, there is no way to determine which subordinate position's object is supplied to the rule. Because of this uncertainty, use this rollup feature only when there is a single subordinate position specified in the roll relationship. |
| Condition | (Optional) Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |

1. Specify the following in the **Actions** area,

| Field | Description |
|--------------------|---|
| Output Name | Commissions automatically creates this the same as the rule name, but you can rename it. |
| Output Period Type | Specify the period type of the created commission. Select the appropriate period type for which this incentive should be generated and available for deposit. |
| Unit Type | Select the unit type of the created commission. See the Commissions Administrator Help for more information on unit types. |
| Input Multiplier | <p>Select either Rate Table, Flat Rate, or No Rate.</p> <p>If you select Rate Table, specify the name of a rate table or rate table variable.</p> <p>If you select Flat Rate, specify a value to be used as a rate.</p> |

1. Specify the following if the rate is based on rate table:

| Field | Description |
|--------------|--|
| Input Amount | <p>Specify the amount of the created commission by either specifying a data field, literal value, or other rule element that calculates a currency value. By default, this is Credit.Value. You can also choose to specify the measurement contribution value or a field on the transaction.</p> <p>Uses the amount that each credit contributed to the measurement. For example, if the credit value is \$100 and the measurement uplifts the credits by 25%, the credit's measurement contribution value is \$125.</p> |
| Quota | <p>Specify a value to be compared to the measurement to determine the attainment percentage (attainment = measurement/quota).</p> <p>In most cases, specify a fixed value or fixed value variable.</p> |
| Attainment | <p>The attainment period is the period for which you are measuring attainment.</p> <p>For example, to compare year-to-date measurement (performance) to the annual quota, specify 'year' as the period type.</p> |

1. Specify the following if the rate is based on a flat rate:

| Field | Description |
|--------------|---|
| Input Amount | <p>Specify the amount of the created commission by either specifying a data field, literal value, or other rule element that calculates a currency value. By default, this is Credit.Value. You can also choose to specify the measurement contribution value or an attribute field on the transaction.</p> <p>Uses the amount that each credit contributed to the measurement. For example, if the credit value is \$100 and the measurement uplifts the credits by 25%, the credit's measurement contribution value is \$125.</p> |
| Rate | Specify the rate. This can be a literal value, a fixed value, a fixed value variable, a formula, or any legal move. |

1. If the rate is based on no rate, specify the following:

| Field | Description |
|--------------|--|
| Input Amount | <p>Specify the amount of the created commission by either specifying a data field, literal value, or other rule element that calculates a currency value. By default, this is Credit.Value. You can also choose to specify the measurement contribution value.</p> <p>Uses the amount that each credit contributed to the measurement. For example, if the credit value is \$100 and the measurement uplifts the credits by 25%, the credit's measurement contribution value is \$125.</p> |
| Quota | Specify a quota. |

Note: Commission amounts for the period being run are calculated only for the set of credits specified by the input period type.

1. Click **Add New Output** and specify information for the new action to add another action to the rule. If you have multiple actions in a rule, the one rule generates multiple outputs.
2. Click **Save** to save the rule.

11 Deposit Rules Overview

A deposit rule determines which incentives to pay and when. Incentives are available to be paid based on the output period type of the incentive. For example, a quarterly bonus incentive is available for deposits in the last month of each quarter (March, June, September, and December). Commissions processes a deposit rule, and creates a deposit only if the incentive is available for deposit. For example, a calculation run in February does not generate a deposit output for a quarterly incentive rule.

Related Articles

- [Input and Filters in Deposit Rules \[page 178\]](#)
- [Deposit Rule Hold Types \[page 179\]](#)
- [Creating an Incentive based Deposit Rule \[page 180\]](#)
- [Creating an Incentive based Deposit Rule \[page 180\]](#)

11.1 Input and Filters in Deposit Rules

In the *Deposit Rule* editor, you can limit the data evaluated by a deposit rule by specifying the input source, either incentives or credits, and creating filters. In the filters area field for incentive-based deposit rules you can do the following:

- **Condition**—Enter a simple or complex expression of conditions that must be met for the rule to be evaluated as true and fired.

In the filters area field for detailed deposit rules you can do the following:

- **Credit from Measurement**—Enter a simple or complex expression of conditions that must be met for the rule to be evaluated as true and fired.
- **Input Period Type**—Select the period type for the credit.
- **Period Offset**—To specify an offset, enter a positive number. You can use offsets to specify a relative, prior period. Enter the number of periods to go back. For example, to use the April monthly measurement in June, you specify 2 in the offsets field.
- **Input From**—The default Current Position. To use a credit from another position, specify the input as Another Position.
- **Relationship**—If you specify that the input is from another position, you must also specify the roll Relationship.
- **Condition**—Enter a simple or complex expression of conditions that must be met for the rule to be evaluated as true and fired.

Actions in Deposit Rules

When the conditions specified in the filters area are met, the action or actions defined in this area are fired (executed) and a deposit output is produced. Among other things, you can specify in this area whether and how the deposit should or should not be held and what earning groups and earning codes should be used for payment balancing.

11.2 Deposit Rule Hold Types

In your deposit rule action, you can specify that deposits be held in particular situations. New rules are added to accommodate customer's needs like hold condition on Deposits. For example, you can place deposits that are above a certain amount on hold so they can be manually reviewed before they are processed. Held deposits are allocated according to their release date, rather than the compensation date of the associated transaction. When a deposit is held, the release date, if specified, sets the compensation date to be the same. If the release date of a held deposit is within the effective dates of a position assignment, the deposit is released. This happens even if the compensation date of the deposit is outside the position assignment's effective dates.

If the compensation date of a transaction is outside the position assignment's effective dates but within the processing date, deposits are not generated. However, if an existing deposit's compensation date is within the position assignment's processing date, the deposit is used in calculation processing. When you create a deposit rule, one of the following hold types can be specified for the deposit.

Hold Types in Deposit Rules

| Hold Type | Description |
|---------------------|--|
| Release Immediately | Default setting. Deposits are available immediately. |
| Indefinite | Deposits are held until manually released. Use this setting if you need to review held deposits before they are included in compensation calculations. A deposit held indefinitely has a release date set to End of Time. |

| Hold Type | Description |
|---------------------|---|
| Period Type | <p>Choose the kind of period (such as month, quarter, year or decade) and the offset.</p> <p>The offset is the number of periods relative to the current period (in which the rule is run and the credit is created) for which the deposit should be held. For example, if the offset is 2, the deposit release date is set for 2 months from the month the deposit is created.</p> <p>Note: If a deposit is held with an offset, the release date is set to the last day of the offset period.</p> <p>If you set the offset to zero (0), the deposit is available for the current period. There is a subtle difference between "r;release immediately" and a period offset of zero:</p> <ul style="list-style-type: none"> • If the deposit is released immediately, the deposit's compensation date is the same as that of the associated transaction. • If the period offset is zero, the deposit's compensation date is the same as the release date. |
| Specific Period | Choose a specific named period, such as January, 2008. The release date is set as the last date of this period. The deposit is processed by any calculation run for this period. |
| Hold With Condition | Use Legal Moves to set a condition to hold the deposit. The deposit will be held indefinite if the condition is true. Set a reason code (optional). |

11.3 Creating an Incentive-Based Deposit Rule

You can create deposit rules that calculate regular deposits based on an incentive or a formula.

To create a deposit rule

1. Click *Deposits* from the *Calculations* menu.
2. Click *Add (new)*.
3. Select Position, Calendar, Name, Value, Earning Group and Earning Code.
4. Enter a name for the deposit rule. This name displays in the Plan workspace and in queries.
5. (Optional) Enter a text description of the rule.
6. If your organization has created and implemented business units, you can assign this rule to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
7. Accept the default, Incentives, as the Source for the deposit rule.

8. (Optional)Specify the following in the *Filters* area:

| Field | Description |
|-----------|---|
| Condition | Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |

9. Specify the following in the *Actions* area:

| Field | Description |
|---------------|---|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. Deposit names are shown in searches and payment and balance information. |
| Unit Type | Specify the unit type of the created deposit. The options are Currency, Percent, Quantity, or Integer. |
| Deposit Value | Specify the incentive or formula. To specify more than one incentive, use a formulaic expression or formula. When you specify an incentive, the Incentive Input Reference Editor dialog opens. |
| Earning Code | A code that differentiates deposits within an earning group. These codes help external accounting systems track departmental earnings. Earning codes can be entered using the following methods: <ul style="list-style-type: none">○ Type a text string into the field. The text string must be entered using double quotations. For example, enter "spif?" to dynamically create a spif (sales promotion incentive fund) earning code. Earning codes entered by this method are not available to other deposit rules.○ Select an earning code from the drop-down list. Earning codes can be created in the Earning Code workspace. Earning groups added in the Earning Group workspace are available for all deposit rules. See the Commissions Administrator Help for more information.○ Select the formula field button to create an earning code formula. |
| Earning Group | Groups similar types of deposits. Positive and negative balances within an earning group are offset against each other. Earning Groups can be entered using the same methods as Earning Codes. |

| Field | Description |
|--------------|--|
| Release Date | The release date drivers when this deposit will be released and processed into further parts of the compensation calculation |
| Reason Code | Identifier created by a user to identify why an action was taken, for example, to identify why a manual credit was created |
| Ever Held | Select a hold type. |

10. (Optional) Click the *node* (grid icon) to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
 - To add another action to the rule, click *Add New Output* and specify information for the new action. If you have multiple actions in a rule, the one rule generates multiple outputs.
11. Click *Save* to save the rule.

Note: You can also create a new deposit rule, manual or calculated, by copying from the user interface. You can also create a manual deposit by copying calculated deposit too.

11.4 Creating a Detail Deposit Rule

You can also create a rule that generates a deposit based on a credit; this kind of rule is called a detail deposit rule. For a detail deposit rule, you specify a primary measurement as a filter for which credits are deposited. You can also specify a condition as an additional filter mechanism. To generate individual deposits based on orders or some other attribute, you must specify a unique earning code or earning group. For example, to generate deposits based on orders, you would specify Credit.Order.OrderID as the earning code. To generate deposits based on a custom attribute, such as Customer ID, you would specify that attribute as the earning code.

To create a detail deposit rule:

1. Click *Rules* to go to the *Rules* workspace from the *Plan Data* menu.
2. Click *Add (new)* and select *Deposit Rule* from the *New* drop-down list. The *New Deposit Rule* dialog opens.
3. Select a different calendar and specify new effective dates in the *New Deposit Rule* dialog if required, and then click *OK*. The *Deposit Rule* editor opens.
4. Enter a name for the detail deposit rule in the *Details* panel. This name displays in the *Plan* workspace and in queries.
5. (Optional) Enter a text description of the rule.
 - If your organization has created and implemented business units, you can assign this rule to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
6. 1. Select *Credits* as the source. The *Deposit Rule* editor changes to reveal the fields for detail deposit rules.
 2. Specify the following in the *Filters* area:

| Field | Description |
|--------------------------|--|
| Credits from Measurement | Specify a primary measurement by which Commissions determines which credits to deposit. |
| Input Period Type | Select the period type for the credit. Be careful to specify the correct period type for the credit. |
| Period Offset | To specify an offset, enter a positive number. You can use offsets to specify a relative, prior period. Enter the number of periods to go back. For example, to use the April monthly measurement in June, you specify 2 in the offsets field. |
| Input From | The default setting is Current Position. To use a credit from another position, specify the input as Another Position. If you specify that the credit comes from another position, you must also specify the roll Relationship. |
| Condition | (Optional) Specify a formulaic expression, a named formula, or a comparison of data fields as a condition to the rule. |

1. Specify the following in the *Actions* area:

| Field | Description |
|---------------|---|
| Output Name | Commissions automatically creates the output name the same as the rule name, but you can rename it. Deposit names are shown in searches and payment and balance information. |
| Unit Type | Specify the unit type of the created deposit. The options are Currency, Percent, Quantity, or Integer. |
| Deposit Value | Specify the credit information (for example, Credit.Value) here by typing in the name or using the Formula field button. |

| Field | Description |
|---------------|---|
| Earning Code | <p>A code that differentiates deposits within an earning group. These codes help external accounting systems track departmental earnings. Earning codes can be entered using the following methods:</p> <ul style="list-style-type: none"> • Type a text string into the field. The text string must be entered using double quotations. For example, enter “spif? to dynamically create a spif (sales promotion incentive fund) earning code. Earning codes entered by this method are not available to other deposit rules. • Select an earning code from the drop-down list. Earning codes can be created in the Earning Code workspace. Earning groups added in the Earning Group workspace are available for all deposit rules. See the Commissions Administrator Help for more information. • Select the formula field button to create an earning code formula. |
| Earning Group | <p>Groups similar types of deposits. Positive and negative balances within an earning group are offset against each other. Earning groups can be entered using the same methods as Earning Codes.</p> |
| Hold Type | Select a hold type. |

1. (Optional) Click the *node* () to reveal the fields if generic attributes are enabled. Populate the fields as required for your installation.
2. To add another action to the rule, click *Add New Output* and specify information for the new action. If you have multiple actions in a rule, the one rule generates multiple outputs.
3. Click *Save* to save the rule.

12 Formulas

A formula rule element is a reusable mathematical expression that can be used in compensation rules, a rate tables, or lookup tables. You can also nest formulas within other formulas. Formulas can be created in the *Formula* workspace and in the *New Formula* dialog. Formulas created in the *New Formula* dialog are limited to the context in which they are created as indicated by the rule type icon. For example, you cannot create a formula as a condition in an incentive rule then use that same formula in a measurement rule. Large expressions or formulas should be split into multiple formulas, for performance and readability reasons. For example, if you have a formula that uses over 20 operators, it is easier to read and is processed faster if you split it into two formulas.

Related Articles

- [Formulas Workspace \[page 185\]](#)
- [New Formula Dialog \[page 188\]](#)
- [Legal Moves \[page 189\]](#)
- [Using Legal Moves \[page 190\]](#)
- [Referencing Measurements and Incentives \[page 194\]](#)
- [Creating a Formula \[page 199\]](#)
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12.1 Formulas Workspace

The *Formula* workspace contains two different panels within Formula Summary, Formula Details and General Information, Associations within Formula Details panel The detail pane of the Formulas workspace contains two tabs: the Formula tab and the Associations tab.

Formula Tab

The following figure shows you the Formula page. You can create new formulas, edit existing formulas, and delete formulas from the Formulas Summary tool-bar. The following list describes the various areas.

The screenshot shows the 'Compensation Elements' interface with the 'Formulas' tab selected. On the left, there's a sidebar with icons for 'Compensation Elements', 'Fixed Values', 'Formulas' (selected), and 'Lookup Tables'. The main area displays a 'Formula Summary' table with five entries:

| | Name | Description | Business Unit | Last Modified | Effective Start Date | Effective End Date |
|-------------------------------------|---------------------------|---------------------------|---------------|---------------------|----------------------|--------------------|
| <input checked="" type="checkbox"/> | formula998 | | | 9/17/2018, 5:41 AM | 1/1/2006 | 1/1/2200 |
| <input type="checkbox"/> | Dule Formula | | | 9/14/2018, 12:29 AM | 1/1/2006 | 1/1/2200 |
| <input type="checkbox"/> | Formula 0827 | | | 9/9/2018, 11:16 PM | 1/1/2006 | 12/31/2011 |
| <input type="checkbox"/> | Participant Salary as ... | Use participant base s... | | 8/24/2018, 10:44 AM | 1/1/1900 | 1/1/2200 |
| <input type="checkbox"/> | Standard MBO Bonus ... | Standard MBO bonus ... | | 8/24/2018, 10:44 AM | 1/1/1900 | 1/1/2200 |

Below the table, there are buttons for 'Show 10 entries' and 'Showing 1 to 5 of 5 entries'.

On the right, there's a detailed view of the 'formula998' row, showing 'General Information' and 'Associations' tabs. The 'General Information' tab displays standard fields like Name, Description, Business Unit, Last Modified, Effective Start Date, and Effective End Date. The 'Formula' tab shows Rule Usage (Direct Transaction My1:Credit, Rolled Transaction My1:Credit, Direct Order My1:Credit, Rolled Order My1:Credit, Primary Measurement, Secondary Measurement, Incentive, Aggregate Commission, Commission, My1:Deposit, Detail My1:Deposit) and Return Type (Currency \$200.00).

Another 'Formula Summary' table is shown below, identical to the one above.

Fields in the Formula tab:

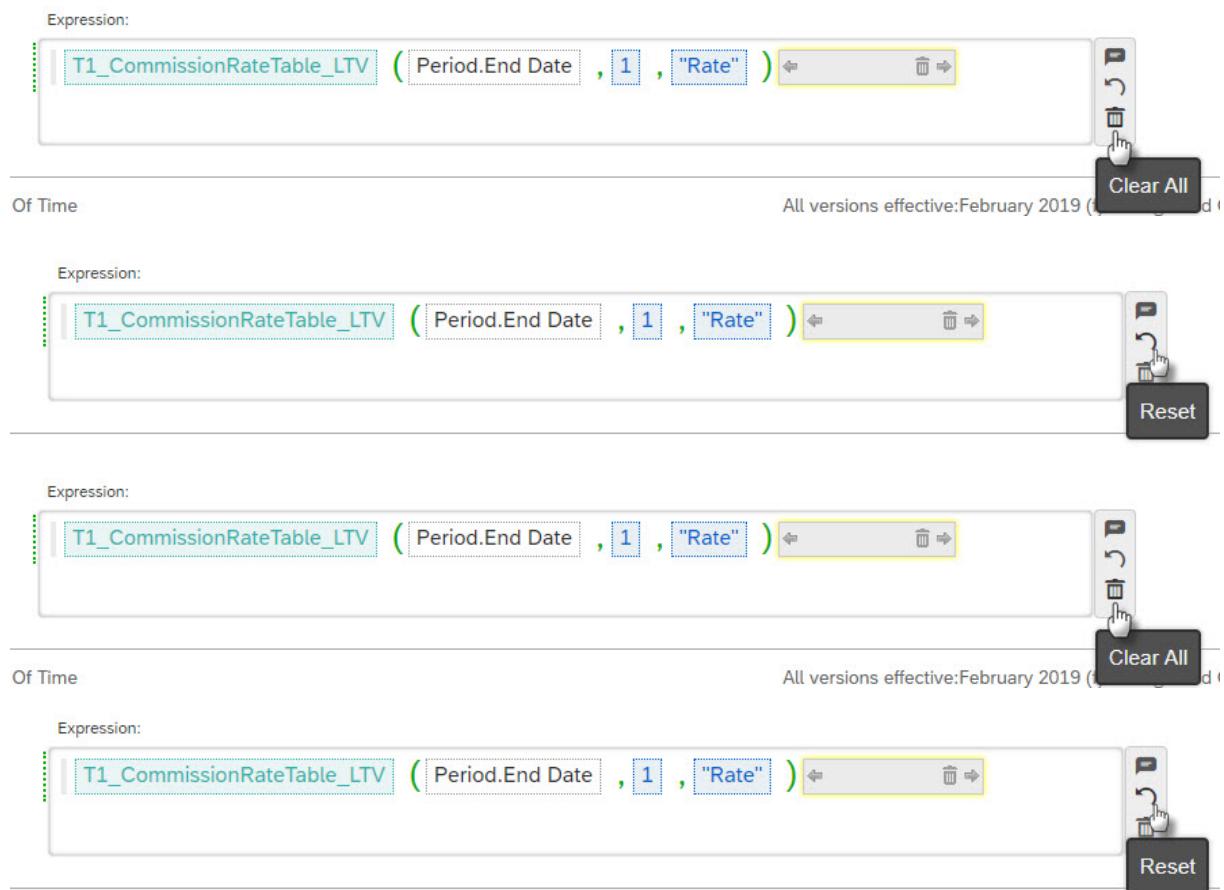
- Return Type field—Specifies the unit type of the formula result.
- Expression pane—Shows the entire formula and all parameters.
- Function pane —Shows a brief description of the selected function and its parameters. To display the detail, click one of the parameters in the Formula pane.

- Rule Usage:
- Legal Moves editor —Select from the list of legal moves to populate the input and parameters to your formulas or expressions.

Legal Move Editor are organized into a column for:

- Literals
- Functions
- Data Fields
- References

Legal Move Editor box have *Clear All* and *Reset* buttons available. This reduces time and effort for the Administrator to edit an existing expression.



Clear All and *Reset* buttons supports the following workspaces:

- Formulas,
- Rules,
- Rules Wizard,
- Plans,
- Plans Wizard,
- Classification,
- Territory

These two features are available in *Manage Version* window in the following workspaces:

- Formulas,
- Rules,
- Rules Wizard,
- Plans,
- Plans Wizard

Clear All (trash can) clears out the current expression. *Reset* reverts to the last saved expression.

Associations Tab

From the Associations tab, you can view the rules that use the formula and the elements associated with the formula.

The screenshot shows two separate instances of a 'Formula Details' interface. Both instances have tabs for 'General Information' and 'Associations'. The 'Associations' tab is selected in both. Under 'Rules using this Formula', there are two entries, each with a bulleted list of two items. The first entry is 'Direct Transaction My1:Credit Rule: Copy of SR_Creditrule_001(1/1/2006 - 1/1/2200)' and the second is 'Direct Transaction My1:Credit Rule: SR_Creditrule_001(1/1/2006 - 1/1/2200)'.

This screenshot is identical to the one above, showing two separate instances of the 'Formula Details' interface with the 'Associations' tab selected. Each instance displays the same two rules under 'Rules using this Formula', each with a list of two items.

12.2 New Formula Dialog

You can create a formula either in the Formulas workspace, or use the *Add new Formula* dialog. You use the formula editor in two ways:

- To create formulas and save them with a name
- Or, to create formulaic expressions.

A formulaic expression is used only by the current rule object. A saved formula, like a rule created in the *Formulas* workspace, can be reused by other rule objects (rules or rule elements).

This panel is now open for editing

General Information Associations

Standard Fields

| | | | |
|--------------------------|---------------------------------|-------------------------------|-----------------------|
| Name (Required) | Description | Business Unit | Calendar (Required) |
| | | | Main Monthly Calendar |
| Last Modified (Required) | Effective Start Date (Required) | Effective End Date (Required) | |
| | 1/1/2006 | 1/1/2000 | |

Formula

Rule Usage
Direct Transaction My1:Credit, Rolled Transaction My1:Credit, Direct Order My1:Credit, Rolled Order My1:Credit, Primary Measurement, Secondary Measurement, Incentive, Aggregate Commission, Commission, My1:Deposit, Detail My1:Deposit

Return Type: Boolean

Expression:

12.3 Legal Moves Overview

When constructing formulas or formulaic expressions, you must specify parameters (literals, functions, data fields, and references) and operators. The items you can select are determined by the context that you are working in. The selections allowed representing the next “legal move” that you can make. Legal moves are displayed in the legal moves pane in the *Formulas* workspace, *New Formula* dialog, *Advanced Search* dialog, and *Search for Related Object* dialogs. When building expressions directly in a workspace, for example when building classification rules, the logic of the next “legal move” is also applied.

- **Return Type**—Determines content of the *Legal Moves* pane.
- **Expression (Formula edit) pane**—Shows the entire formula and all parameters.
- **Legal Moves pane**—Displays the legal move items that are available. Legal move items are organized into the following types:
 - **Literals**—Items such as true, false, units of time, and so on.
 - **Functions**—Predefined, reusable operations that can be used in compensation rules.
 - **Data fields**—Fields associated with objects, such as the participant's base salary.
 - **References**—Point to data items such as variables, rule elements, measurements, or incentives.

Related Articles

- [Available Legal Moves \[page 189\]](#)
- [Formatting of Items in the Expression \(Formula\) Edit Pane \[page 190\]](#)

12.3.1 Available Legal Moves

Contents of the legal moves pane are influenced by the following factors:

- The context that the formula is being created within in the Formula editor. For example, if you are using the Formula editor to create a condition for a credit rule, the data fields available would differ from those available for the condition of a deposit rule.

- The return type of the formula. For example, the Legal Moves available to create a formula with a return type of Boolean would differ from those available to create a formula with a return type of date.
- Whether specific attributes have been enabled. For example, you must enable generic attributes for Transaction Payee Pre-Assignments so that the Transaction Extended and Transaction Generic attributes are included in the list of data fields. See the Commissions Administrator Help for more information on enabling and disabling attributes.

12.3.2 Formatting of Items in the Expression (Formula) Edit Pane

When Legal Moves items are specified, the following formatting rules are applied in the Expression (Formula) Edit Pane:

- Upon selecting a reference, the reference type name goes away and all that is left is the name of the selected object. This makes items such as formulas easily readable at a glance.
- Variables and Result References (for example, measurements and incentives) are italicized to indicate data coming from another object.
- Variables and references to fixed values, territories, and rate tables are in green text to indicate data coming from rule elements.
- Data fields are in plain, black text.
- Literals are in blue text, including data types (such as month, year, commission, bonus, and so forth).
- Period types associated with an object (such as a period type of an incentive) are displayed in the format ofObjectName:PeriodType. For example, BookedRevIncentive:quarter.
- If offset amounts are specified for measurement and incentive references, they are displayed in the format Object Name:Period Type-Offset Amount. For example, BookedRevIncentive:quarter-3, where 3 is the offset amount.
- If you reference a data type, such as a reason code, you can reference it by the ID, such as Transaction.Reason Code.ID.

12.4 Using Legal Moves Overview

The following procedure provides an overview of how to use legal moves.

To use Legal Moves:

1. Specify the return type. This is the unit type of the formula result.
2. Specify the literals, functions, data fields, or references and operators required to build the formula in the **Formula** edit panel.
 - If you have chosen a function, the function's parameter details display in the *Function Detail* pane.
1. Select a parameter in the *Formula Definition* pane for each parameter, and then select an item from the list of available legal moves.

To display a list of available literals, functions, data fields, and references and operators, you can type an asterisk (*) in the *Formula Edit* pane to use wildcard matching. Or, you can use auto-matching and type the first

few letters of the literal, function, data field, or reference name. You can also double-click the name of the object to select it. An item that is shaded in blue indicates that the expression is either incomplete or incorrect. Although you can save an incomplete or incorrect formula, you must correct the error before you can use the formula. You can copy and paste legal move expressions within and across workspaces. In some cases, such as when copying a formula from within a rate table, you must first open the [New Formula](#) dialog before you can copy the expression. If you must copy text in the process of creating and modifying objects, use an ASCII text editor such as Notepad.

Related Articles

- [Specifying Strings \[page 191\]](#)
- [Specifying Listed and Unlisted Data Fields \[page 191\]](#)
- [Specifying Operators \[page 193\]](#)
- [How Input to Formulas Determines Range of Use \[page 194\]](#)

12.4.1 Specifying Strings

You can include strings as parameters in your formulas. To enter a string literal, enclose it in double quotation marks, such as: "Golf Rep". For example, to compare the above string to a field you might construct an expression such as the following in the Formula Edit Pane: Credit.Comments = "Golf Rep"

12.4.2 Specifying Listed and Unlisted Data Fields

You can include available data fields in your (formulas) Expression. For example, to construct a Boolean formula comparing the Credit Release Date to the Credit.Roll Date (Credit.Release Date = Credit.Roll Date) you would first specify Credit.Release Date as shown in the following figure.

The screenshot shows the Formula Editor interface. At the top, there are two tabs: 'General Information' and 'Associations'. Below these are two sections: 'Standard Fields' and 'Formula'.

Standard Fields: This section contains four input fields:

- Name (Required): A text input field.
- Description: A text input field.
- Last Modified (Required): A text input field.
- Effective Start Date (Required): A date input field set to 1/1/2006.

Formula: This section has a 'Rule Usage' dropdown containing the text: "Direct Transaction My1:Credit, Rolled Transaction My1:Credit, Direct Order My1:Credit, Rolled Order My1:Credit, Primary Measurement, Second".

Below this is an 'Expression:' dropdown menu. The menu is currently expanded and shows the following options:

- Credit
- My1:Credit.Comments
- My1:Credit.Compensation Date
- Mv1:Credit Credit Type: sutm

However, some data fields are not specifically listed in the *Legal Moves* pane, but the items that contain them are listed. For example, to use the company name from the transaction billing address, you must first specify “Transaction.Billing?” in the Formula Edit pane. If you then type a period “.? after “Billing?”, you can access the transaction billing address fields, such as “Transaction.Billing.Company?” as shown in the following figure.

12.4.3 Specifying References

You can include available references in your formulas. References are ways to point to a data object, such as the items listed in the following table. Items that you can reference from Legal Moves

| References | |
|----------------------|-----------------------|
| Category* | Lookup Table Variable |
| Category Hierarchy* | Measurement |
| Classifier* | Period |
| Credit Type* | Period Type* |
| Event Type* | Quota |
| Fixed Value | Rate Tables* |
| Fixed Value Variable | Roll Type |
| Formula | Territory* |
| Incentive | Unit Type* |
| Lookup Table | |

*These objects can only be referenced as function parameters.

When you specify a reference in a formula, Commissions follows it with a colon (:). You must specify the exact reference item. For most references, you can select an item using wildcard matching or automatic matching and in many cases, you can actually use the *Create New Object* option to create an inline object as shown in the following figure. There are some exceptions when working with references:

- There is no *Create New Object* option for quota objects, so you cannot create quotas inline.
- When you specify an Incentive or Measurement, the Incentive Input Reference and Measurement Input Reference dialogs are displayed.

The display format, type color, and style, of the references, are as follows:

- Rule element (fixed values, lookup tables, formulas, quotas, rate tables, and territories) references are displayed in green text to indicate that the data is coming from rule elements. Categories are also displayed in green text. Variables and formulas display in green text in lookup table cells (when the cell is selected).
- Result data (measurements and incentives) references are displayed in black italicized text to indicate data coming from another object. The period types associated with these references are displayed in the format of objectName:periodType (for example, BookedRevIncentive: quarter).
- Rule element variable (fixed value variables, rate table variables, and territory variables) references are displayed in green and italicized text.
- Period type (month, year, and so on), event type, roll type, and credit type references are displayed in blue text to indicate that the data is from administration data or a data type.
- Classifiers to references are also displayed in blue text.

12.4.4 Specifying Operators

You can specify operators by typing them in or using wildcard matching as shown in the following figure. Only those operators that are valid in the current context are displayed.



The list of available operators could include one or more of the following:

- * (multiplication)
- + (addition)
- <> (not equal to)
- - (subtraction)
- <= (less than or equal to)

- = (equal to)
- / (division)
- >= (greater than or equal to)

12.4.5 How Input to Formulas Determines Range of Use

The data used in a formula determines the type of compensation rule in which you can use the formula. Just as different types of data are available during different stages of calculation processing, formulas use different types of data for different types of rules. For example, if you use transaction data in a formula, then the formula can be used only in direct credit rules. If you do not use calculation-dependent data in a formula, then you can use the formula in any type of rule and also in a rate table. For example, a formula that multiplies a fixed value by another fixed value can be used in any type of rule and also in a rate table. All formulas must return a value. Rate tables can use formulas that use fixed values as input or can be used in an incentive rule (input of measurements, or credits for per-credit commissions).

12.5 Referencing Measurements and Incentives

You can reference the output of a measurement or incentive rule from another rule, formula, or rule element. This section covers references to measurements and incentives.

i Note

When making changes to references to measurements or incentives, the changes affect all versions of the referencing rule or formula.

Related Articles

- [Referencing Incentives \[page 194\]](#)
- [Referencing Measurements \[page 197\]](#)

12.5.1 Referencing an Incentive

You can include in your rules, formulas, or expressions a reference to an incentive. An incentive reference includes an incentive rule's output value of the specified period type in your calculation. Some rules, such as bulk commission rules, have the mechanism to refer to an incentive built into the rule. Other rules, such as deposit rules, require that you specify the incentive reference by way of the *Incentive Reference Editor* dialog.

i Note

A self-reference is a reference to a different period type of the rule's output. For example, within a quarterly incentive rule, you can refer to the year-based version of that incentive. Self-references can occur in measurement or incentive rules.

To reference an incentive in a formula:

1. Click *Formulas* the *Plan Data* menu
2. Double-click the *Incentive* Input item in the list of references in the *Legal Moves* panel
 - o Commissions opens the *Incentive Input Reference* dialog.
3. Specify the following information for the incentive:

| Field | Description |
|-------------------|---|
| Calendar | Specify the calendar appropriate within the context from which you are creating the reference. For example, if you are creating an incentive reference from a deposit rule, ensure that the two rules are based on the same calendar. |
| Incentive | Specify the name of the incentive on which this rule or formula operates using auto-matching, wildcard matching, or the Search field button. The incentive is the input to this rule. The list contains the incentives defined in the bonus, per-credit commission, and commission rules. |
| Input Period Type | Select the incentive period that represents the appropriate incentive value for the calculation. Be careful to specify the correct period type for the incentive. |
| Offset | To specify an offset, enter a positive number. You can use offsets to specify a relative, prior period. Enter the number of periods to go back. For example, to use the April monthly measurement in June, you specify 2 in the offsets field. |
| Position source | The default setting is Direct' To use the incentive from another position, specify the input as Indirect. If you specify that the incentive comes from another position, you must also specify an operation for the List Operation and the Relationship. |

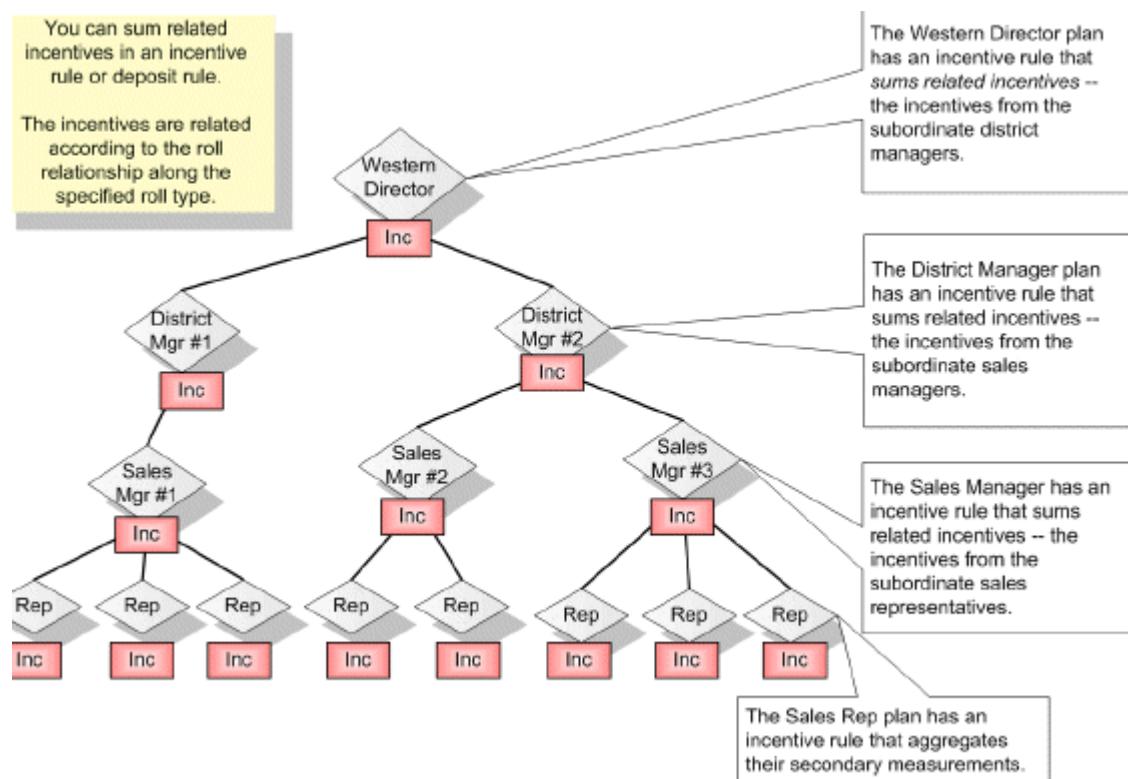
| Field | Description |
|----------------|--|
| List Operation | <p>If you have specified that the incentive input comes from another position, you must also specify how to handle multiple inputs (if there are any):</p> <ul style="list-style-type: none"> ○ Sum of All Inputs ○ Average of All Inputs ○ Error if more than one input <p>Note: If the reference to the incentive is from within the Sum Prior Measurements function, the list operation option is not available.</p> |
| Relationship | Specifies the relationship for the measurement. |

4. 1. Click **OK** to use the specified incentive input.

Commissions displays the name and period type of the specified incentive input.

Sum Related Incentives

Select the Sum of All Inputs as a list operation in an incentive or deposit rule to add up a group of related incentives. The related incentives are those that have the same name and are from subordinates one roll relationship away (with the specified roll type).



12.5.2 Referencing a Measurement

You can include in your rules, formulas, or expressions a reference to a measurement. A measurement reference includes a measurement rule's output value of the specified period type in your calculation.

To reference a measurement in a formula:

1. Click *Formulas* the *Compensation Elements* menu.
2. Double-click the *Measurement* reference from the *References* list in the *Legal Moves* panel.

Commissions opens the *Measurement Input Reference* dialog.

1. Specify the following information for the measurement:

| Field | Description |
|-------------------|---|
| Calendar | Specify the calendar appropriate within the context from which you are creating the reference. For example, if you are creating a measurement reference from an incentive rule, ensure that the two rules are based on the same calendar. |
| Measurement | Specify the name of the attainment measurement on which this rule operates using wildcard matching, automatic matching, or the Search field button. The measurement is the input to this rule. The list contains the measurements defined in the measurement rules. |
| Input Period Type | Select the period type for the measurement. Be careful to specify the correct period type for the measurement. |
| Period Offset | To specify an offset, enter a positive number. You can use offsets to specify a relative, prior period. Enter the number of periods to go back. For example, to use the April monthly measurement in June, you specify 2 in the offsets field. |

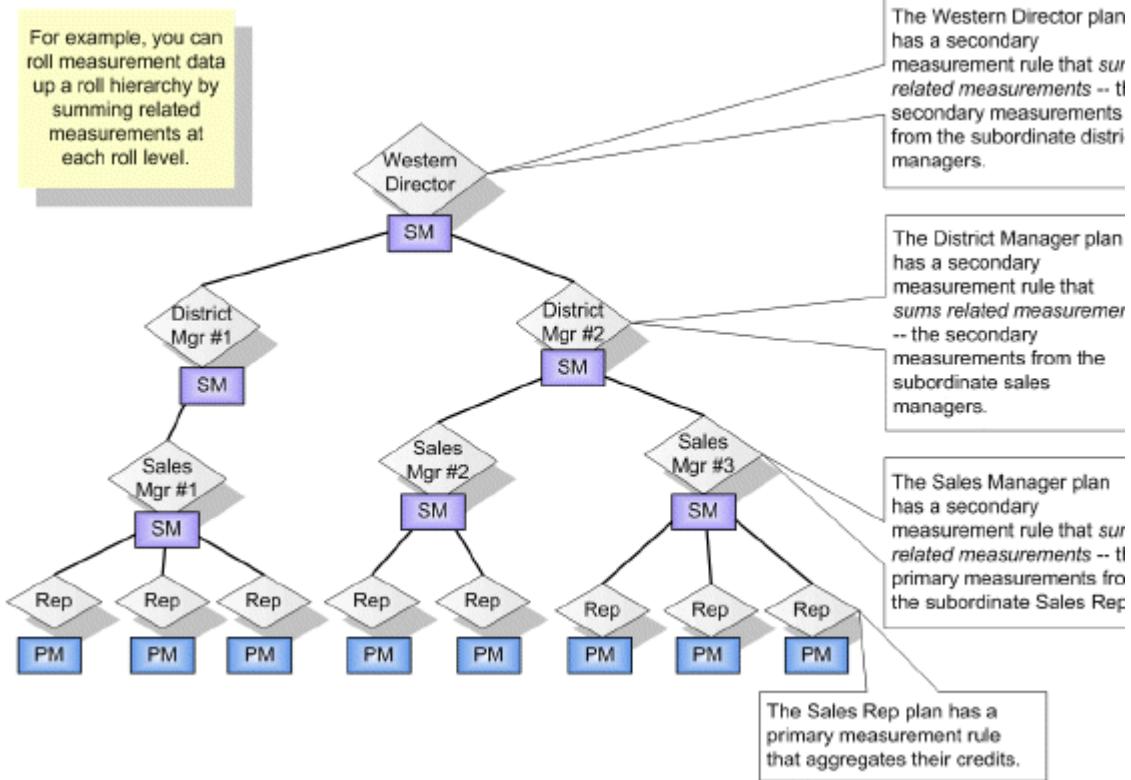
| Field | Description |
|----------------|--|
| List Operation | <p>The default setting is Current Position.</p> <p>To use the measurement from another position, specify the input as Another Position. If you specify that the measurement comes from another position, you must also specify an operation for the List Operation and the Relationship.</p> |
| Relationship | <p>If you have specified that the measurement input comes from another position, you must also specify how to handle multiple inputs (if there are any):</p> <ul style="list-style-type: none"> • Sum of All Inputs • Average of All Inputs • Error if more than one input <p>Note: If the reference to the incentive is from within the Sum Prior Incentives function, the list operation option is not available. The list operation option is also not available if you</p> |
| | Specifies the relationship for the measurement. |

1. Click [OK](#) to use the specified measurement input.

Commissions displays the name and period type of the specified measurement input.

Sum Related Measurements

Select the Sum of All Inputs as a list operation in a secondary measurement, incentive, or deposit rule to add up a group of related primary or secondary measurements. Measurements are related if they have the same name; they can be summed only from subordinates one Roll relationship away (with the specified Roll type). The following figure illustrates an example of how you could aggregate measurements up a Rollup hierarchy, rather than Rolled credits.



For example, you can Roll measurement data up a Roll hierarchy by summing related measurements at each Roll level. As illustrated:

- The first level (sales representatives) aggregates credits into primary measurements.
- The second level (sales managers) aggregates primary measurements into secondary measurements.
- The third and fourth levels (district managers and Western Director, respectively) aggregate secondary measurements into secondary measurements.

You can simplify your plans greatly by summing related measurements instead of credits up a Roll hierarchy.

i Note

If you need to show per-credit commissions at the higher levels of the Rollup hierarchy, you must use Rollup credits instead of aggregating measurements.

12.6 Creating a Formula

You can create a formula either directly in the Formulas workspace, or by clicking the Formula field button to open the Formula editor. You use the formula editor in two ways: 1) to create formulas and save them with a name, or 2) to create formulaic expressions. A formulaic expression is used only by the current rule object. A saved formula can be reused by other rule objects (rules or rule elements). A saved formula can be created from the Formulas workspace, as described below, or from the Formula editor. Large expressions or formulas should be split into multiple formulas, for performance and readability reasons. For example, if you have a formula that uses over 20 operators, if you split it into two formulas it is easier to read and is processed faster.

To create a formula:

1. Click *Formulas* from the *Compensation Elements* menu.
2. Click *Add (New)*. The *New Formula* dialog displays.
3. Select a calendar and specify the effective dates for the new formula.
4. Enter formula name in the detail panel. The *Summary* panel immediately reflects with your entry. The formula name entered here can be referenced in rules, rule elements, and other formulas.
5. (Optional) Enter a text description for the formula.
 - o If your organization has created and implemented business units, you can assign this formula to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the *Commissions Administrator Help* for more information about business units.
6. Select the **Return Type** for the formula. Available return types are the base unit types, plus other common values such as Boolean, currency, date, percent, quantity, integer, and string. See the *Commissions Administrator Help* for more information on base unit types.
7. Construct the expression by selecting from the list of legal moves. The legal moves that are listed are those that are appropriate to the return type specified for the formula or expression in the Formula edit pane.
8. Click an item to edit it.
9. When applicable, double-click an underlined item to open a secondary editor dialog box. In the **Formula Edit pane**, Commissions highlights incomplete or inappropriate element.
10. Complete the details in the *Formula Edit panel* if you select a Function from the list of legal moves. The Function Info pane (right, grey pane) shows the detail for the selected function, including a brief description of each parameter.
11. Use any of the following techniques to manipulate the parts of a formula:
 - o To insert an element into an expression, click the data element that is to the right of where you want to insert something. Select the element(s) from the list of legal moves.
 - o To add an element, either double-click it in the list of legal moves or type * to bring up a list of data fields and functions. You can also start typing the name of the item, and Commissions either fills in the rest of the name (if there is only one item by that name) or provides a list of items that begin with that name.
 - o To delete an element from an expression, select the element and press Delete or Backspace (deletes items to the left of the selection).
 - o To replace a data element, select and delete it, and then select the item from the list of legal moves. To change a function parameter, select the parameter and then replace it by selecting the parameter from the Legal Moves listing.
 - o If the original item is a value and you need to change the value, double-click the item and type the new value.
 - o To replace a literal value with a placeholder, select the literal value (such as a precise calendar date of September 27, 2008), and select the placeholder from the list of legal moves (for example, select the Transaction.Compensation Dateitem).
12. Click *Save* to save the formula.

12.7 Editing a Formula

To edit a formula involves any of the following operations:

- Renaming a formula.
- Add or remove a rule element (formula, variable, fixed value, rate table, territory, or lookup table).
- Change the return type of the formula.
- Add, remove, or change any of the parts of the formula that contribute to how the formula calculates its results.
- Change the effective dates of the formula.

i Note

You cannot change the formula's calendar. You must instead create a new formula. Currently, the association between a calendar and a formula cannot be broken or changed.

Be aware that when you edit a formula, you edit the specified version of the formula. For example, you have a formula that is effective from February 2008 to the End Of Time. If, however, in August 2008 you change how the formula calculates, it is important to know the effective dates of the change. If, for example, to back-date a change effective to February 2008, then you edit the current version of the formula (click *Manage Versions* in the *Formulas* workspace). However, to make the changes effective from August 2008 to the End Of Time, create a new version of the formula, and make the changes to that new version (click *New Version* in the *Formulas* workspace). If you have a formula that is no longer effective, you change the effective end date of the formula to the required date. Do not delete a formula if the formula was valid for any point in time.

12.8 Deleting a Formula

You can delete a formula that was just created either manually. You cannot delete a formula that is referenced by a rule or a rule element. To delete such a formula, first change or remove the condition or action that references the formula. Deleting a formula removes all versions of the formula object from the SAP Commissions; however, the audit log in the *Audit Log* workspace retains information on the actions performed on the formula object, including its remove (delete) date, and information about the objects themselves.

i Note

To delete a particular version of a formula, use *Manage Versions* on the toolbar.

12.9 Finding Objects Related to Formulas

You can find data related to one or more selected formulas by selecting the appropriate object option from the *Related* pane. The available options and data returned are as follows:

- **Rules**—returns the rules referring to the selected formula.

- **Referring Formulas**—returns the formulas referring to the selected formula.
- **Referred Formulas**—returns the formulas referred to by the selected formula.
- **Referred Fixed Values**—returns the fixed values referred to by the selected formula.
- **Referring Rate Tables**—returns the rate tables referring to the selected formula.
- **Referred Rate Tables**—returns the rate tables referred to by the selected formula.
- **Referred Variables**—returns the variables referred to by the selected formula.
- **Referred Lookup Tables**—returns the lookup tables referred to by the selected formula.
- **Referring Lookup Tables**—returns the lookup tables referring to the selected formula.
- **Quotas**—returns the quotas referred to by the selected formula.
- **Plans**—returns the plans that are referring to the rules which are referring to the selected formula.

To find objects related to formulas:

1. Click *Formulas* from the *Compensation Elements* menu.
 2. Select a formula or formulas for which you need to find related objects in the *Summary* panel.
 3. Select an object option, for example, Plans in the *Related* pane.
- If you are searching for related plans, the plans are retrieved immediately and the results are displayed in the Plan workspace. If no results are found, the message “No Records Found.” is displayed in the summary view panel.
 - If you are searching for an object other than plans, the *Search for Advanced Related Objects* dialog with the name of the selected object substituted for the object name.

13 About Variables

A variable is a placeholder in a rule or formula for a fixed value, rate table, or territory. You can assign a rule element directly to the variable, the plan, the title, or to the position. You either create the variable first and then use it in a rule, or create the variable while you are editing the rule. If you use variables, you must populate the variable with a default element.

Related Articles

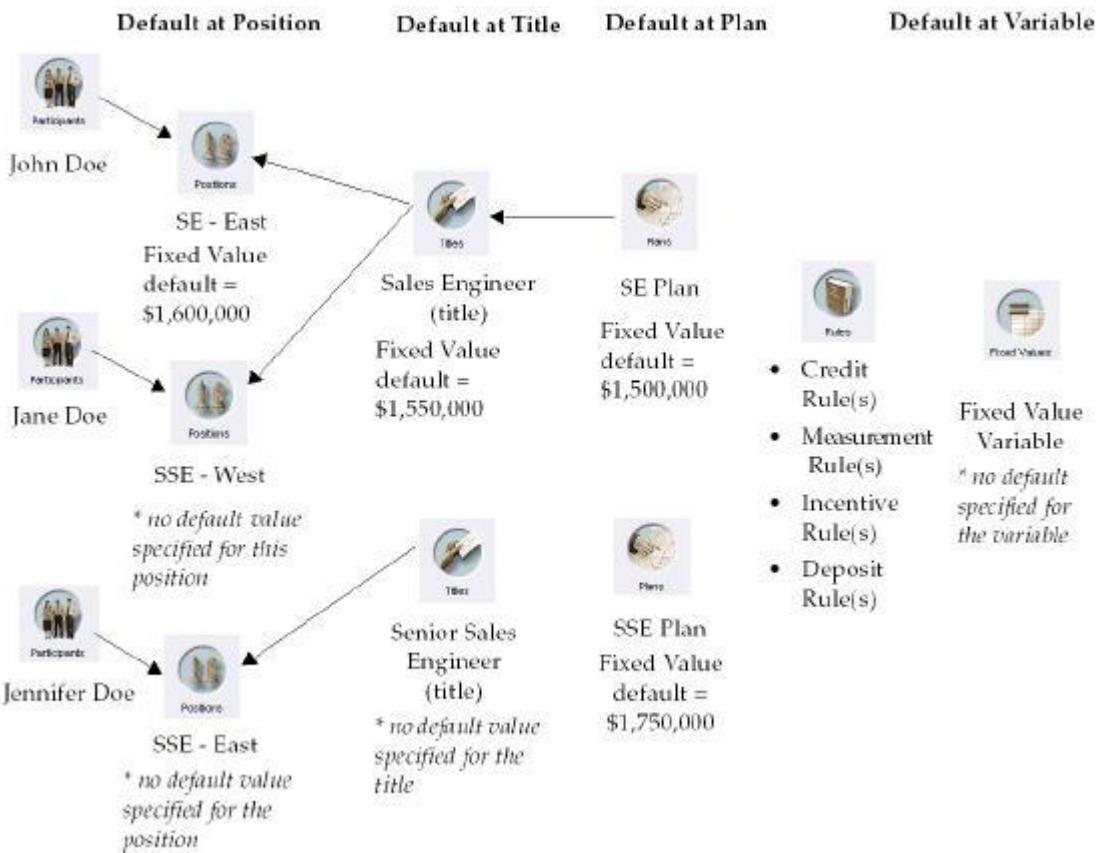
- [Variable Assignments \[page 203\]](#)
- [Variable Workspace \[page 204\]](#)
- [Creating Variables \[page 205\]](#)
- [Editing Variables \[page 208\]](#)
- [Finding Objects Related to Variables \[page 209\]](#)
- [Assigning Rule Element to Variables \[page 210\]](#)

13.1 Variable Assignments

You can assign default values to variables at different levels: at the variable level, at the plan level, at the title level, and at the position level. The plan default overrides that of the variable, the title variable default overrides that of the plan or the variable level, and the position variable default overrides all other defaults.

- A rule element assigned to a variable at the position level applies to only that specific position (overrides the defaults at all other levels).
- A rule element assigned to a variable at the title level applies to all positions that use the title (overrides the Plan and Variable defaults).
- A rule element assigned to a variable at the plan level applies to all positions assigned to the plan (overrides the Variable defaults).
- A rule element assigned to the variable applies to all plans that include a rule that uses the variable.

The following figure illustrates how a variable can be assigned a different default value at different assignment levels.



For example: in the rules in the Golf Product Sales Specialist plan there is a fixed value variable named AnnualQuota_FVV. A default fixed value (representing a quota) can be assigned at the variable level; defaults set at the variable level apply to wherever the variable is used, which could be multiple plans. A default fixed value can also be assigned at the plan level, so that every position assignment assigned to the Golf Product Sales Specialist plan uses the same quota, as a default. If the plan default is set, this overrides the default set at the variable level.

If everyone associated with the Golf Product Sales Specialist title should use the same quota, a default fixed value can be assigned at the title level. If the default is set at the title, this overrides any defaults specified at the variable or plan levels. If it is preferred that each position assignment has a customized quota, then a default fixed value can be assigned for each position. If the default is specified with the position, then this default overrides any other specified defaults.

13.2 Variable Workspace

Variable Tab

When you make a selection from the drop-down list, the workspace that is opened is referred to as an editor. For example, when you select Fixed Value Variable from the New drop-down list, the Variable editor is displayed.

Variable Details

This panel is now open for editing

(X) Cancel Save

General Information

Standard Fields ▾

| | | | |
|---|--|--|----------------------|
| Name (Required) | Type (Required) | Business Unit_caid | Description |
| <input type="text"/> | Fixed Value | <input type="text"/> x US | <input type="text"/> |
| Calendar | Return Type (Required) | Required Period Type | Default |
| Main Monthly Calendar | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Last Modified (Required) | Effective Start Date (Required) | Effective End Date (Required) | |
| <input type="text"/> | <input type="text"/> 1/1/2006 | <input type="text"/> 1/1/2200 | |

Associations Tab

You can view the rules that use the variable from the Associations tab. You can also view the elements associated with the variable.

Variable Details

General Information Associations

Rules using this Variable

- Aggregated Incentive Rule Rule: IR Base Commissions Target Based Stepped RT MTD(1/1/2006 - 1/1/2200)

Elements associated with Variable

- Formula: Testformula(1/1/2006 - 1/1/2200)
- Rate Table: RateTable2(1/1/2006 - 1/1/2200)

13.3 Creating Variables

This chapter takes you to the steps in creating a Fixed value variable, Rate table variable, Territory variable and Lookup table variable.

Quick Links

- Creating a Fixed Value Variable [page 206]
- Creating a Rate Table Variable [page 206]
- Creating a Territory Variable [page 207]
- Creating a Lookup Table Variable [page 207]

13.3.1 Creating a Fixed Value Variable

You can create a fixed value variable to customize the fixed value that is used, at either the plan, title, or position. A fixed value variable is a placeholder for a fixed value. You can assign a default to the fixed value variable, and override that default at the plan, title, or position level. In cases when you are assigning a fixed value to a fixed value variable and the variable has a period type specified, the period type of the fixed value and variable must match. You cannot assign a fixed value without a period type to a fixed value variable that has a period type specified.

To create a fixed value variable, perform the following steps:

1. Click *Variables* from the *Compensation Elements* tab.
2. Click *Add (new)* and select *Fixed Value Variable* from the new drop-down list in the *Variables* workspace. This displays the *New Fixed Value Variable* dialog.
3. Select a different calendar and specify new effective dates in the *New Fixed Value Variable* dialog, and then click *OK*.
 - This displays the *Fixed Value Variable* editor.
4. Enter a unique name for the fixed value variable. The fixed value variable name that you define here is the one you specify later when including the variable in a rule or formula.
 - If your organization has created and implemented business units, you can assign this variable to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Online Help for more information about business units.
5. (Optional) Enter text description for the variable.
6. Select a *Return Type* as a base unit type of the fixed value variable.
7. (Optional) Specify a Default fixed value for this variable. You can override this default at the plan, title, or position levels.
8. Select a *Required Period* Type to make the variable accept only fixed values of a specific period type.
9. Click *Save*.

13.3.2 Creating a Rate Table Variable

You can create a rate table variable to customize the rate table that is used, at either the plan, title, or position. A rate table variable is a placeholder for a rate table. You can assign a default to the rate table variable, and override that default at the plan, title, or position level.

To create a rate table variable, perform the following steps:

1. Click *Rate Tables* option to go to the *Variables* workspace from the *Compensation Elements* menu
2. Click *Add (new)*.
3. Choose an Effective Start and End Date, and then click *OK*
4. Select *Rate Table Variable*. This displays the *New Rate Table Variable* dialog.
5. Select a different calendar and specify new effective dates in the *Rate Table Variable* dialog, and then click *OK* if required. This displays the *Rate Table Variable* editor.
6. Enter a unique name for the rate table variable. The rate table variable name that you define here is the one you specify later when including the variable in a rule or formula.
 - If your organization has created and implemented business units, you can assign this variable to one or more business units by selecting from the Business Units drop-down. You can only select business

units to which you as a user have been assigned. See the Commissions Administrator Online Help for more information about business units.:

7. (Optional) Enter a text description of the variable.
8. Select an *Input Type*. The input type is the unit type of the attainment tiers in the rate table.
9. Select a *Return Type*. The return type is the unit type of the rates stored in the rate table.
10. Click *Save*.
11. (Optional) Specify *Default Rate Table* for this variable. You can override this default at the plan, title, or position levels.

13.3.3 Creating a Territory Variable

You can create a territory variable to customize the territory that is used, at either the plan, title, or position. A territory variable is a placeholder for a territory. You can assign a default to the territory variable, and override that default at the plan, title, or position level.

To create a territory variable, please perform the following:

1. Click *Variables* from the *Compensation Elements* menu.
2. Click *Add (new)*.
3. Select *Territory Variable* option in the *Variables* workspace. This displays the *Territory Variable* dialog.
4. Select a different calendar and specify new effective dates in the *Territory Variable* dialog, and then click *OK* if required. This displays the *Territory Details* panel.
5. Enter a unique name for the territory variable. The territory variable name that you define here is the one you specify later when including the variable in a rule or formula.
 - o If your organization has created and implemented business units, you can assign this variable to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Online Help for more information about business units.
6. (Optional) Enter a text description of the variable.
7. (Optional) Specify a default territory to satisfy this territory variable. You can override this default at the plan, title, or position levels.
8. Click *Save*.

13.3.4 Creating a Lookup Table Variable

You can create a lookup table variable to customize the lookup table that is used, at either the plan, title, or position. A lookup table variable is a placeholder for a lookup table. You can assign a default to the lookup table variable, and override that default at the plan, title, or position level. The effective date range of lookup table variables must be greater than or equal to the effective date range of the lookup table that is assigned as the default. Once a lookup table variable has been used in a rule element, it cannot be modified.

Unlike other types of variables, you must specify a default value for a lookup table variable. The structure (return type and number and types of dimensions and in the same order) of this default predetermines the structure of the lookup table, when SAP Commissions is standalone. In other words, if the default lookup table has a return type of USD and two dimensions, with dimension type of string and numeric range respectively,

then only lookup tables with this same structure can be assigned to the lookup table variable. However, different versions of a lookup table variable can have different structures. It is, therefore, possible to create a new version if a new structure is needed.

To create a lookup table variable, perform the following steps:

1. Click *Variables* from the *Compensation Elements* menu.
2. Click *Add(new)*.
3. Select *Lookup Table Variable* option in the *Variables* workspace. This displays the *New Lookup Table Variable* dialog.
4. Select a different calendar and specify new effective dates in the *Lookup Table Variable* dialog, and then click if necessary. This displays the *Lookup Table Variable* editor.
5. Enter a unique name for the lookup table variable. The lookup table variable name that you define here is the one you specify later when including the variable in a rule or formula.
 - ○ If your organization has created and implemented business units, you can assign this variable to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Online Help for more information about business units.
6. (Optional) Enter a text description of the variable.
7. Specify a default lookup table to satisfy this lookup table variable.
8. Click *Save*.

13.4 Editing Variables

You can edit manually created variables in the *Variables* workspace. When editing variables in Commissions, you can update the following options:

- Name
- Business Unit
- Description
- Required Period Type
- Default

To edit *Variables* in the Variables workspace:

1. Log into Commissions
2. In the *Compensation Elements* menu select *Variables*.
3. Choose a variable that you want to edit, and click 
4. Add new information in the available fields.
5. Click *Save*.

The variable is now successfully edited.

13.5 Deleting a Variable

You can delete a variable that was just created manually in UI. You cannot delete a formula that is referenced by a rule or a rule element. You can also select variables of different types (fixed value variables, rate table variables, lookup table variables, and territory variables) and delete them if all the variables selected do not have related results data and are not referred to by other objects. When you multi-select variables of different types, no information is displayed in the detail pane. Deleting a variable removes all versions of the variable object from the SAP Commissions; however, the audit log in the Audit Log workspace retains information on the actions performed on the variable object, including its remove (delete) date, and information about the object itself. See the *Commissions Administrator Help* for more information on the audit log.

i Note

To delete a particular version of a variable, use the Manage Versions button on the toolbar.

13.6 Finding Objects Related to Variables

You can find data related to one or more selected variables by selecting the appropriate object option from the Related pane. The available options and data returned are as follows:

- **Rules:** returns the rules referring to the selected variable.
- **Referring Formulas:** returns the formulas referring to the selected variable.
- **Referring Lookup Tables:** returns the lookup tables referring to the selected variable.
- **Plans:** returns the plans referring to the selected variable.
- **Positions:** returns the positions referring to plans that have rules referring to the selected variable.
- **Titles:** returns the titles referring to plans that have rules referring to the selected variable.
- **Fixed Values:** returns the following:
 - Fixed values used in the variable assignment for the fixed value variable regardless of whether the variable assignment is by plan, title, or position.
 - If a default fixed value was assigned to the fixed value variable, returns that fixed value.
- **Rate Tables:** returns the following:
 - Rate tables used in the variable assignment for the rate table variable regardless of whether the variable assignment is by plan, title, or position.
 - If a default rate table was assigned to the rate table variable, returns that rate table.
- **Territories:** returns the following:
 - Territories used in the variable assignment for the territory variable regardless of whether the variable assignment is by plan, or title or position.
 - If a default territory was assigned to the territory variable, returns that territory.
- **Lookup Tables:** returns the following:
 - Lookup tables used in the variable assignment for the lookup table variable regardless of whether the variable assignment is by plan, title, or position.
 - If a default lookup table was assigned to the lookup table variable, returns that lookup table

To find objects related to variables, perform the following steps:

1. Click **Variables** from the **Plans** tab.
 2. Search for the variable or variables for which you want to find related data if required.
 3. Select the variable or variables In the **Summary** view.
 4. Click the **Related** panel and select an object option, for example, **Rules**.
- If you are searching for related plans, positions, titles, fixed values, rate tables, territories, or lookup tables, the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message "No Records Found." is displayed.
 - If you are searching for related rules, referring to formulas, or referring lookup tables, the Search For Advanced Related Objects dialog displays with the name of the selected object substituted for the object name.

13.7 Assigning Rule Elements Overview

When working with Territory, Fixed Value, and Rate Table variables, the default value that is used in rules depends on the level (variable, plan, title, or position) at which the default is specified. Variables specified at the Position level taking precedent over variables specified at the title or plan levels. The following table describes the order of precedence used to determine which default is used. Because you can only specify a default for a Lookup Table at the variable level, these default precedences do not apply.

Variable Default Assignments:

| Default Level | Description | Display |
|---------------|--|-------------------------|
| Variable | Applies wherever the variable is used. | Element name (variable) |
| Plan | Applies to each place the variable is used on the specified plan. Overrides any default specified at the variable. | Element name (plan) |
| Title | Applies to each place the variable is used on a plan that is assigned to the specified title. Overrides any default specified at the variable or plan levels. | Element name (title) |

| Default Level | Description | Display |
|---------------|--|-------------------------|
| Position | Applies to each place a variable is used on a plan associated with the specified position. | Element name (position) |
| | Overrides any default specified in the variable, plan, or title levels. | |

When viewing what elements are assigned to variables, if an element is assigned to the variable at the plan level when you view the list of assignable items at the position or title level, the plan level variable assignment displays with "(plan)" next to it. The same is true for when an item is assigned at the title level, and you are viewing the item at the position level.

i Note

When viewing the plan, you can assign elements to variables at the position or title levels. Follow the same procedure as for assigning at the plan level, but in the list of assignments, select either the title or the position instead of the default. (If the position is associated with the plan by way of a title assignment, the position is not specifically listed here).

Related Articles

- [Assigning or Removing a Lookup Table \[page 211\]](#)
- [Assigning or Removing a Territory \[page 212\]](#)
- [Assigning or Removing a Rate Table \[page 213\]](#)
- [Assigning or Removing a Fixed Value \[page 214\]](#)

13.7.1 Assigning or Removing a Lookup Table

The following procedures cover how to assign a lookup table to a variable at the plan level. You can also assign a lookup table to a variable at the position, title, or variable levels. You perform those operations from the Positions, Titles, or Variables workspaces. You can also select a position or title in the Assignments tab of the Plan workspace to do position and title variable assignments.

To assign a lookup table to a plan's lookup table variable at the plan level:

1. Click *Plans* from the *Plan Data* menu.
2. Select a plan. The plan must contain a rule that uses a lookup table variable.
3. Click the *Assignments* tab if required.
4. Select *Default* in the list of *Assignable* items.
 - Default refers to the assignment at the plan level.
5. Click the area in the *Rule Element* column that corresponds to the lookup table variable to which you want to assign a lookup table.
6. Specify a *Lookup Table*.

7. Click **Save** to save the changes.
 - The lookup table is now assigned to the variable at the plan level.

To remove a lookup table assignment to a lookup table variable, at the plan level:

1. Click **Plans** from the **Plans** tab.
 2. Select a plan.
 3. Click the **Assignments** tab.
 4. Select Default in the list of the assignable items. Default refers to the assignment at the plan level.
 5. Select the **Lookup Table** that is assigned to the territory variable.
 6. Click **Close**.
 7. Click **Save**.
- Commissions removes the plan-level assignment of the lookup table to a lookup table variable.
 - If the variable has a default lookup table set, then the variable-level lookup table is now the default. The variable assignment displays with “(lookup table variable)” after it. If there is a lookup table assigned to the variable at either the title or position levels, those assignments continue to override any defaults set at the variable or plan levels.

13.7.2 Assigning or Removing a Territory

The following procedures cover how to assign a territory to a variable at the plan level. You can also assign a territory to a variable at the position, title, or variable levels. You perform those operations from the Positions, Titles, or Variables workspaces. You can also select a position or title in the Assignments tab of the Plan workspace to do position and title variable assignments.

To assign a territory to a plan's territory variable, at the plan level:

1. Click **Plans** from the **Plan Data** menu.
2. Select a plan. The plan must contain a rule that uses a territory variable.
3. Click the **Assignments** tab if required.
4. View Variable assigned by, select Default in the list of **Assignable** items. Default refers to the assignment at the plan level.
5. Click the area in the **Rule Element** column that corresponds to the territory variable to which you want to assign a territory.
6. Specify a territory.
7. Enter to complete the change
8. Click **Save** to save the changes.

The territory is now assigned to the variable at the plan level.

To remove a territory assignment to a territory variable at the plan level:

1. Click **Plans** from the **Plans** tab.
2. Select a plan.
3. Click the **Assignments** tab.

4. Select Default in the list of *Assignable* items (View Variable assigned by).
 - Default refers to the assignment at the plan level.
5. Select the territory that is assigned to the territory variable.
6. Click `close('x')`.
7. Click *Save*.
 - Commissions removes the plan-level assignment of the territory to a territory variable.
 - If the variable has a default territory set, then the variable-level territory is now the default. The variable assignment displays with "(territory variable)" after it. If there is a territory assigned to the variable at either the title or position levels, those assignments continue to override any defaults set at the variable or plan levels.

13.7.3 Assigning or Removing a Rate Table

The following procedures cover how to assign or remove a rate table to a variable at the plan level. You can also assign a rate table to a variable at the position, title, or variable levels. You perform those operations from the Positions, Titles, or Variables workspaces. You can also select a position or title in the Assignments tab of the Plan workspace to do position and title variable assignments.

To assign a rate table to a plan's rate table variable, at the plan level:

1. Click *Plans* from the *Plan Data* menu.
2. Select a plan. The plan must contain a rule that uses a rate table variable.
3. Click the *Assignments* tab if necessary.
4. Select *Default* in the list of Assignable items (View Variable assigned by). The *Default* refers to the assignment at the plan level.
5. Click the area in the *Rule Element* column that corresponds to the rate table variable to which you want to assign a rate table.
6. Specify a rate table. When choosing an existing rate table, Commissions displays a list of rate tables that are appropriate to the input type and return type for the rate table variable.
7. Click *OK* to complete the change, and click *Save* to save the changes. The rate table is now assigned to the variable at the plan level.

To remove a rate table assignment to a rate table variable, at the plan level:

1. Click *Plans* from the *Plans* tab.
2. Click the *Assignments* tab.
3. Select Default in the list of *Assignable* items (View Variable assigned by). The Default refers to the assignment at the plan level.
4. Select the rate table that is assigned to the rate table variable.
5. Click `close('x')`, and then *Save*.
 - Commissions removes the plan-level assignment of the rate table to a rate table variable.
 - If the variable has a default rate table set, then the variable-level rate table is now the default. The variable assignment displays with "(rate table variable)" after it. If there is a rate table assigned to the variable at either the title or position levels, those assignments continue to override any defaults set at the variable or plan levels.

13.7.4 Assigning or Removing a Fixed Value

The following procedures cover how to assign or remove a fixed value assignment to a variable at the plan level. You can also assign a fixed value to a variable at the position, title, or variable levels; you perform those operations from the Positions, Titles, or Variables workspaces. You can also select a position or title in the Assignments tab of the Plan workspace to do position and title variable assignments.

To assign a fixed value to a plan's fixed value variable at the plan level:

1. Click *Plans* from the *Plan Data* menu.
2. Select a *plan*. The plan must contain a rule that uses a fixed value variable.
3. Click the *Assignments* tab.
4. Select *Default* in the list of *Assignable* items. The *Default* refers to the assignment at the plan level.
5. Click the area in the *Rule Element* column that corresponds to the fixed value variable to which you want to assign a fixed value.
 - ○ If a fixed value variable has a required period type specified, that period type is listed along with the name of the variable in the list of assignable items.
6. Specify a fixed value. When choosing an existing fixed value, SAP Commissions displays a list of fixed values that are appropriate to the return type and period type, if necessary, for the fixed value variable.
7. Click *Ok* to complete the change, and click *Save* to save the changes. The fixed value is now assigned to the variable at the plan level.

To remove a fixed value assignment to a fixed value variable, at the plan level:

1. Click *Plans* from the *Plans* tab.
2. Select a plan.
3. Click the *Assignments* tab.
4. Select *Default* in the list of *Assignable* items. The *Default* refers to the assignment at the plan level.
5. Select the fixed value that is assigned to the fixed value variable.
6. Click *close('x')*, and click *Save*.
 - Commissions removes the plan-level assignment of the fixed value to a fixed value variable.
 - If the variable has a default fixed value set, then the variable-level fixed value is now the default. The variable assignment displays with "(fixed value variable)" after it. If there is a fixed value assigned to the variable at either the title or position levels, those assignments continue to override any defaults set at the variable or plan levels.

14 About Territories

A territory is a named group of categories and classifiers that are used to filter input to credit and measurement rules. Although the name territory implies geographical location, territories can include categories and classifiers that are associated with products and customers as well as postal codes and other custom classifier types. Territories are used in credit rules to determine who gets credit for a transaction. Territories are also used in measurement rules to determine how credits are aggregated. You define a territory using categories. A simple territory can use a single category or classifier in its definition. For example, you can define a territory strictly based on the products that a salesperson sells.

A complex territory can combine several categories, or parts of category hierarchies, together in its definition. For example, a complex territory can be defined as a mix of products, geographical locations, and industries. When you create a territory you can tie multiple categories and classifiers together with 'And' and 'Or' logic (Boolean). Negative ('not') logic is also available for excluding specific things from a larger grouping.

Related Articles

- [Territory Workspace \[page 215\]](#)
- [Creating a Territory \[page 217\]](#)
- [Editing a Territory \[page 218\]](#)
- [Deleting a Territory \[page 219\]](#)
- [Finding Objects Related to Territories \[page 219\]](#)

14.1 Territory Workspace

In Territory workspace, you can create new territories, edit existing territories, and delete territories from the Territory tab.

Territory Tab

The following figure shows the *Territories* page on the *Territory* workspace.

The screenshot shows the Territories module interface. The top navigation bar includes 'Territories', 'Search', 'Advanced Search', and various search and filter icons. Below is the 'Territory Summary' table:

| Name | Business Unit_cald | Description | Last Modified | Effective Start Date | Effective End Date |
|---------------------------------|--------------------|-------------|--------------------|----------------------|--------------------|
| Beeswax Territory_sirisha | US | | 6/8/2017, 10:38 PM | 1/1/2005 | 1/1/2020 |
| Honey Territory_sirisha | US | | 6/8/2017, 10:38 PM | 1/1/2005 | 1/1/2020 |
| Territory_sirisha | Any BusinessUnit | | 6/7/2017, 9:26 AM | 1/1/2005 | 7/31/2005 |
| Territory with long expression1 | US | | 6/2/2017, 11:30 AM | 1/1/2005 | 1/31/2010 |
| Territory98 | US | | 6/2/2017, 10:24 AM | 1/1/2005 | 1/1/2020 |
| COM-6994-TC | US | | 6/1/2017, 1:43 PM | 1/1/2005 | 1/1/2020 |
| test terr 22 | US | | 5/31/2017, 4:34 PM | 1/1/2005 | 1/1/2020 |
| LARGE EXPRESSION | US | | 5/25/2017, 4:35 PM | 1/1/2005 | 1/1/2020 |
| RK territory export | US | | 5/19/2017, 3:23 PM | 1/1/2005 | 1/1/2020 |
| RK Territory - Test | Ruchi | | 5/1/2017, 2:34 PM | 1/1/2005 | 4/30/2017 |

Below the table are buttons for 'Show' (10 entries), 'Showing 1 to 10 of 38 entries', 'First', 'Previous', 'Next', and 'Last'. The 'Territory Details' screen is also visible, showing the 'General Information' tab selected. It displays fields for Name (Beeswax Territory_sirisha), Business Unit_cald (US), Description, Last Modified (6/8/2017, 10:38 PM), Effective Start Date (1/1/2008), and Effective End Date (1/1/2020). The 'Territory' section shows an Expression field containing 'Beeswax_sirisha (Beeswax_sirisha) :ACME TrueComp Products_sirisha'.

In the territory definition (Expression)area, you can define your territories by selecting components from the Legal Moves pane. You can use the logical operator buttons to join or combine territory criteria; you can use and, or, not, in addition to creating parenthetical statements. Commissions processes the logical operators of and, or in the order in which they display unless they are in parenthetical statements. For example, the following example of:

Golf Putter AND Named Account OR Area Code 831 is processed as

[(Golf Putter AND Named Account) OR Area Code 831]

i Note

You can copy and paste territory definitions between territories. To do so, select a territory, double-click the definition to select it, use **Ctrl** + **C** to copy it; then in the target territory, use **Ctrl** + **V** to paste it.

If you use multiple categories to create a territory, construct the territory definition to maximize processing efficiency. Commissions evaluates territories from the top down. After the territory evaluation succeeds (finds a match), it stops evaluating and goes on to the next step in the rule.

- For an and condition, both parts must be true for the territory to succeed. List the clause that is most likely to fail first. If it fails, the rule engine stops evaluating and moves on. If you put the clauses in the other order, most likely to succeed, then the rule engine must go on to evaluate the second clause.
- For an and condition, the match succeeds if either clause is true. List the clause that is most likely to succeed first. If it succeeds, the rule engine stops evaluating sooner and moves on to the rest of the rule.

Associations Tab

From the [Associations](#) tab, you can view the rules that use the territory and the elements associated with the territory.

Territories workspace: Classifier Search notifies with a tooltip ‘Classifier ID Is Not Found’ under legal move editor window:

When a user searches for Classifier ID in the [Legal Move Editor](#) window, if it is not found, a tooltip displays a message [Classifier ID Is Not Found](#).

To search for the classifier ID,

1. Go to Compensation Elements>Territories and click on the [Edit](#) icon to edit Territory details.
2. In the [Legal Move Editor](#) window, type expression [And](#), then select [reference: classifier](#) expression. Search for the required classifier ID. The classifier ID displays if it exists in the system. If the system does not have an associated ID an error [Classifier: ID IS Not Found](#) displays.

The screenshot shows the 'Territory' section of the Legal Move Editor. The 'Expression:' field contains the text 'Incomplete expression.' followed by a search bar with the query 'TestPrd:Test_vv1_Pro | And Classifier:Medium'. A tooltip 'Classifier:Medium Is Not Found' is displayed over the search bar. Standard fields like Name, Business Unit, Description, and Last Modified are also visible.

i Note

This functionality is applicable for all the Legal Move Editor supported workspaces under Plan data and Compensation Elements sections.

14.2 Creating a Territory

You can create simple territories that include a single category and its classifiers or a complex territory that includes or excludes categories and classifiers based on certain conditions. Although you can create territories that do not have associated categories and classifiers and even include these territories in rules, transactions associated with these territories are not classified.

To create a territory, perform the following steps:

1. Click *Territories* from the *Compensation Elements* menu.
2. Click *Add*. The *New Territory* dialog displays.
3. Specify the effective dates for the new territory. This creates a new empty territory.
4. Enter a unique name for the territory in the details panel. The territory name is used when assigning the territory rule element to a plan. The *Summary* panel immediately reflects with your entry.
 - If your organization has created and implemented business units, you can assign this variable to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Online Help for more information about business units.
5. (Optional) Enter a text description of the territory.
6. Select the *Show Category Hierarchies* option to display the *Category Hierarchy* panel.
7. Specify the item(s) by performing any of the following:
 - **Search by name**—Type the beginning text of an existing subcategory or classifier, select an item from the list, and press Return to add the item to the territory definition.
 - **Search by name**—Type * to get a list of all subcategories or classifiers, select an item from the list that pops up, and press Return to add the item to the territory definition.
 - **Search by category location**—In the right pane, locate and select the subcategory or classifier, and click *Add* to add the item to the territory definition.
 - For an AND statement, put first the element that is the most likely to fail. For example, AreaCode=408 'and' Product=Golf Clubs.
 - For an OR statement, put first the element that is the most likely to succeed. For example, Channel=Direct 'or' Product=Golf Pro Sets
 - You can use Ctrl-click and Shift-click to select multiple categories. After you click *Add*, Commissions prompts you for the logical operator to combine the selected items.
 - To combine multiple category criteria, use the logical operators. Type * to get a list of all applicable logical operators. You can also directly type any logical operator. (Note that <> is “not equal to”). In both cases, processing time is not spent evaluating the second element.
 - To rearrange a territory definition, you can use copy and paste (right-click and select the edit operation from the context menu).
 - Use any of the following techniques to manipulate the parts of a territory:
 - To change a category or classifier in a territory expression: The Territory Expression area, select the item you want to change and then press Delete. Select another category item, and click *Add* to add the replacement item.
 - To change the logic that joins multiple categories: Select the operator item in the Territory Definition area, and then press Delete. Click one of the available logical operator buttons to replace the deleted operator.
8. Click *Save*.

14.3 Editing a Territory

To edit a territory involves any of the following operations:

- Rename the territory

- Add, remove, or change the territory's description
- Change the territory's expression
- Change the effective dates of the territory

Be aware that when you edit a territory, you edit the specified version of the territory. For example, say you have a territory that is effective from May 2008 to the End Of Time. If, however, in September 2008 you change how the territory calculates, it is important to know the effective dates of the change. If, for example, you back-date changes to May 2008, then you edit the current version of the territory (click *Manage Versions* in the *Territories* workspace). However, to make changes effective from September 2008 to the End Of Time, create a new version of the territory, and make the changes to that new version (click *Manage Versions* in the *Territories* workspace). If you have a territory that is no longer effective, you change the effective end date of the territory to the required date. You do not do a delete operation if the territory was valid for any point in time.

14.4 Deleting a Territory

You can delete a territory that was just created either manually or using XML import. You cannot delete a territory that is referenced by a rule or rule element or is assigned to a territory variable. Deleting a territory removes all versions of the territory object from the SAP Commissions; however, the audit log in the *Audit Log* workspace retains information on the actions performed on the territory object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a territory, use the *Manage Versions* button on the toolbar.

14.5 Finding Objects Related to Territories

You can find data related to one or more selected territories by selecting the appropriate object option from the *Related* panel. The available options and data returned are as follows:

- **Rules**—returns the rules that are referring to the selected territory.
- **Positions**—returns the positions that have the selected territory in the position variable assignment.
- **Titles**—returns the titles that have the selected territory in the title variable assignment.
- **Referring Variables**—returns the variables that have the selected territory as their default.
- **Categories**—returns the categories referred to by the selected territory.
- **Plans**—returns the following:
 - Plans that are referring to the rules that are directly using the selected territory.
 - Plans that have the selected territory in the plan variable assignment.

To find objects related to territories, perform the following steps:

1. Click *Territories* from the *Compensation Elements* menu.
2. Search for the territory or territories for which to find related data if necessary.

3. Select territory or territories in the *Summary* panel.
4. Select object option, for example, *Rules* in the *Related* panel.
 - If you're searching for related plans, the plans are retrieved immediately and the results are displayed in the Plan workspace. If no results are found, the message *No Records Found* is displayed.
 - If you're searching for related rules, titles, positions, or referring variables, the *Search for Advanced Related Objects* dialog displays with the name of the selected object substituted for the object name.

15 Fixed Values Overview

Fixed values might or might not be period based. A fixed value that is not period based can be used to store a single, reusable value. A period-based fixed value can be used to store reusable values for each leaf-level period within a specified date range. For example, a period-based fixed value can store, for each month, a participant's MBO performance percentage. A fixed value can also store a commission rate, a target amount, or a counter for the number of product types sold.

Fixed Value Types are an optional attribute you can create and then apply to groups of fixed values. If you want to organize your fixed values by type, you can create and assign a fixed value type to a selection of fixed values. For example, you could create fixed value types for Quotas, Commission Rates, and Counters. See the Commissions Administrator Online Help for instructions on creating fixed value types. You can use a fixed value wherever a value is called for—in a rule, in a field on a participant or position, or in a formula, rate table, lookup table, or another fixed value. You can use a fixed value inside of a variable or you can use a fixed value directly.

In cases when you are assigning a fixed value to a fixed value variable and the variable has a period type specified, the period type of the fixed value and variable must match. You cannot assign a fixed value without a period type to a fixed value variable that has a period type specified. Fixed values have a unique name and period type combination. For example, you can create three fixed values, each with the same name but each with a different period type, such as year, quarter, and month. You can also create a fixed value with the same name and not specify a period type.

You can use a fixed value directly in a compensation rule, or you can use a fixed value variable in the rule and then assign the fixed value to the variable.

Related Articles

- [Fixed Values and Effective Dates \[page 221\]](#)
- [Using a Fixed Value or Quota \[page 222\]](#)
- [Fixed Values and Quotas \[page 222\]](#)
- [Fixed Value Workspace \[page 222\]](#)
- [Creating a Fixed Value \[page 223\]](#)
- [Editing Fixed Values \[page 224\]](#)
- [Deleting a Fixed Value \[page 225\]](#)
- [Finding Objects Related to Fixed Values \[page 225\]](#)

15.1 Fixed Values and Effective Dates

Here are some notes about working with fixed values:

- You cannot change the period type of a fixed value after you have entered values. If you want to change the period type of a fixed value, you must create a new fixed value.

- When selecting the periods to show using show values for, Commissions allows you to select the periods that are of a higher level period type than the period type of the fixed value. For example, if the fixed value is month-based, then you can show values for the quarters or years. For year-based fixed values, you can only change what periods to show if you have a period type defined that is of a higher level than year, such as a decade.
- When values are not entered in consecutive cells for fixed values, gap versions are created. These gap versions are assigned null values.

15.2 Using a Fixed Value or Quota

If you want to set quota values for a group of positions unrelated in the reporting hierarchy, fixed values are a better choice. Fixed values are also useful if you want to set default values at the variable, title, or plan levels. If you want to manage quota values for a large portion of the organization from a single screen, quotas are a better choice. You can view the quota values for an entire position hierarchy across multiple period types.

15.3 Fixed Values and Quotas

Fixed values cannot be used in a quota object. In cases where a rule or rule function asks for a quota value, you can specify either a literal value, a fixed value, a fixed value variable, or a quota object. For example, a commission rule uses a value in a field labeled “quota” to calculate the commission. In this quota field, you can specify a literal value, a fixed value, a fixed value variable, or a quota object.

15.4 Fixed Values Workspace

The *Fixed Values* workspace contains the *Fixed Value* tab and the *Associations* tab.

Fixed Value Tab

The following figure shows the *Fixed Value* tab. When you select a period type, the right side of the detail pane changes to reflect your selection. The selection of month is reflected. If no period type is selected, the right side of the detail pane remains blank.

The screenshot shows the Fixed Value Summary table and the Fixed Value Details pane. The summary table lists two entries:

| Name | Description | Value | Business Unit | Fixed Value Type | Period Type | Last Modified | Effective Start Date | Effective End Date |
|--------------------------|-------------|-------|---------------|------------------|-------------|--------------------|----------------------|--------------------|
| RK_Fixed_value__non_-... | | 3.4% | US | | | 1/2/2019, 3:26 PM | 1/1/2006 | 1/1/2020 |
| RK_FixedValue_Month | | 1% | US | | month | 1/2/2019, 11:39 AM | 1/1/2019 | 1/31/2019 |

Below the table, the Fixed Value Details pane shows the General Information tab selected. It displays standard fields for the selected fixed value entry:

- Name:** RK_Fixed_value__non_-periodtype
- Description:** (empty)
- Calendar:** Main Monthly Calendar
- Business Unit:** US
- Fixed Value Type:** (empty)
- Period Type:** (empty)
- Last Modified:** 1/2/2019, 3:26 PM
- Effective Start Date:** 1/1/2006
- Effective End Date:** 1/1/2020

i Note

When you select a period based fixed value in the summary pane, Commissions displays only the value associated with the default period in the summary record. For example, if you select the Sales Associate Monthly fixed value and the default period is January 2008, the value for January 2008 is displayed. This is because the summary pane can only show one value.

Associations Tab

From the Association tab of the Fixed Values workspace, you can view the rules that use the fixed value and the elements associated with the fixed value.

The screenshot shows the 'Fixed Value Details' workspace with the 'Associations' tab selected. The interface includes tabs for 'General Information' and 'Associations'. Below the tabs, there are two main sections: 'Rules using this Fixed Value' and 'Elements associated with Fixed Value'. The 'Rules using this Fixed Value' section contains a single item: 'Direct Transaction Credit Rule: RK Credit 0102(1/1/2006 - 1/1/2200)'. The 'Elements associated with Fixed Value' section is currently empty.

15.5 Creating a Fixed Value

Create a fixed value for a value that you want to store and reuse, such as a quota or a currency conversion rate. You can copy fixed values, as long as you give the new fixed value a unique name and period type.

To create a fixed value:

1. Click [Fixed Values](#) to go to the [Fixed Values](#) workspace.
2. Click [Add new](#). The new [Fixed Values](#) dialog displays.
3. In the dialog, specify the calendar and effective dates for the new fixed value.
 - Commissions creates a new, empty fixed value.
4. In the detail pane, enter a unique name for the fixed value. The fixed value name that you define here is the one you specify later when you assign the fixed value to a rule or formula either directly, or by way of a fixed value variable. The summary pane immediately reflects your entry.
5. If your organization has created and implemented business units, you can assign this fixed value to one or more business units by selecting from the [Business Units](#) drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
6. (Optional) Enter a description for the fixed value.
7. (Optional) If fixed value types have been created by your SAP Commissions administrator, select a [Fixed Value Type](#).
 - See the Commissions Administrator Help for more information on fixed value types.
8. (Optional) Select a Period Type. If you select a period type, the fixed value is period-based and you can enter values for each of the leaf-level periods. Each period value is treated internally as a separate fixed value version.

- The available periods are dependent on the calendar specified for the fixed value. For example, if you have specified the Main Monthly Calendar, you can select month, quarter, year, or decade. In the following example, quarter was selected.
- Values for each period can be entered in the fixed values pane on the right. If the same value is required for several periods, you can click *Manage Versions* to access the *Versions for Object* dialog. Entering a value for the first leaf-level period cascades the value down. You can also use *Manage Versions* to create versions within a particular leaf period by clicking the *New field* button. For example, if you are using a “quarter” period type, you can actually create a version for a month within that quarter. In the fixed values pane a quarter that contains one or more monthly versions displays as Various
- If you do not specify a period type, then the fixed value that is created is a single, effective-dated value. Additional versions can be created by using the *New Versions* button.
- If you do not specify a period type, then the fixed value that is created is a single, effective-dated value. Additional versions can be created by using the *New Versions* button.
If no period type was selected, enter a number in the Value field and click the *Unit Type* field button to select a unit type. The predefined unit types are USD, percent, integer, and number, but more can be created.

i Note

Period-based fixed values can only be assigned to variables of the same period type.

9. If a Period Type was selected, you can optionally select a period from the Show values for the drop-down list. You can select and display all periods associated with the calendar, or select and display only a specific period or range of periods. For example, if you selected a quarterly period type, you can select 2008 to display the quarterly periods for 2008.
10. In the *Fixed Values* pane on the right, click in the Fixed Values column and, for each period displayed, enter a value then click the Unit Type field button to select a unit type for that value.
11. Click *Save*.

15.6 Editing a Fixed Value

To edit a fixed value involves any of the following operations:

- Rename the fixed value
- Change the business unit of the fixed value
- Add, change, or remove the description of the fixed value
- Add, change, or remove the fixed value type associated with the fixed value
- Change the value or values, if the fixed value is period based, of the fixed value
- Change the effective dates of the fixed value

i Note

You cannot change the fixed value's calendar. You must instead create a new fixed value. Currently, the association between a calendar and a fixed value cannot be broken or changed.

Editing a period-based fixed value creates a new version of that fixed value. When you edit a fixed value that is not period based, you edit the specified version of the fixed value. For example, you have a fixed value that is effective from January 2008 to the End Of Time. If in February 2008 you change the fixed value's value, it is

important to know the effective dates of the change. If, for example, you want the changes to be back-dated effective to January 2008, then you edit the current version of the fixed value (click [Manage Versions](#) in the [Fixed Values](#) workspace). If you want the changes to be effective from February 2008 to the End Of Time, then you create a new version of the fixed value, and make the changes to that new version (click [Manage Versions](#) in the [Fixed Values](#) workspace). If you have a fixed value that is no longer effective, you change the effective end date of the fixed value to the desired date. Do not delete the fixed value if it was valid for any point in time.

15.7 Deleting a Fixed Value

You can delete a fixed value that was just created either manually or using import. You cannot delete a fixed value that is referenced by a rule or rule element or is assigned to a fixed value variable. Deleting a fixed value removes all versions of the fixed value object from the SAP Commissions; however, the audit log in the [Audit Log](#) workspace retains information on the actions performed on the fixed value object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a fixed value, use the [Manage Versions](#) button on the toolbar.

15.8 Finding Objects Related to Fixed Values

You can find data related to one or more fixed values by selecting the appropriate object option from the Related pane. The available options and the data returned are as follows:

- **Rules**—returns the rules that are referring to the selected fixed value.
- **Positions**—returns the positions that have the fixed value in their position variable assignment.
- **Titles**—returns the titles that have the selected fixed value in their title variable assignment.
- **Referring Formulas**—returns the formulas that are referring to the selected fixed value.
- **Referring Rate Tables**—returns the rate tables that are referring to the selected fixed value.
- **Referring Variables**—returns the variables that have the selected fixed value as their default.
- **Referring Lookup Tables**—returns the lookup tables that are referring to the selected fixed value.
- **Plans**—returns the following:
 - Plans that are referring to the rules that are directly using the selected fixed value.
 - Plans that have the fixed value in their plan variable assignment.

To find objects related to fixed values:

1. Click [Fixed Values](#) from the [Plan Data](#) menu.

2. Search for the fixed value or fixed values for which to find related data if necessary.
3. Select the fixed value or fixed values in the *Summary* panel.
4. Select an object option, for example, *Rules* in the *Related* panel.
 - If you are searching for related plans, the plans are retrieved immediately and the results are displayed in the *Plan* workspace. If no results are found, the message *No records Found* is displayed.
 - If you are searching for objects other than related plans, the *Search for Advanced Related Objects* dialog displays with the name of the selected object substituted for the object name.

16 Quotas Overview

Quotas are values that apply across an entire reporting structure, and you can manage the different values from a single screen. You can select multiple period types, and perform automatic sum or distribute functions to distribute the quota values across an organization. The main advantage of quotas is that you can manage the quota values for a large portion of an organization from a single screen. You can view the quota values for an entire position hierarchy across multiple period types. However, to set quota values for a group of positions unrelated in the hierarchy, fixed values are a better choice. Fixed values are also useful if you need to set default values at the variable, title, or plan levels. You can use a quota wherever a value is used, except in a fixed value variable or in another quota. If you're accustomed to using fixed values, there are some important things to note about quotas:

- Quotas aren't effective dated. Instead, they are effective from the beginning of time (01/01/1900) to the End Of Time (1/1/2200). Quotas apply to all versions of a position.
- You cannot use a quota in a fixed value variable. When you use a quota in a rule or formula, you directly reference the quota. Quotas do not have default values. If you do not specify a quota value for a position and a period, during a calculation run that includes that period the rule that uses the quota does not calculate a result for that position.

i Note

When values are not entered in consecutive cells for quotas, gap versions are created. These gap versions are assigned null values.

Related Articles

- [Quotas Workspace \[page 227\]](#)
- [Creating a Quota \[page 228\]](#)
- [Editing a Quota \[page 230\]](#)
- [Deleting a Quota \[page 230\]](#)
- [Quota Functions \[page 231\]](#)

16.1 Quotas Workspace

The detail pane of the Quotas workspace contains two tabs: the General Information tab and the Quota Values tab.

General Information Tab

The following figure shows the General Information tab.

The screenshot shows the Quota Details page with the General Information tab selected. The page includes fields for Name, Business Unit, Description, and Calendar, along with a Period Types section and a Last Modified timestamp.

| | | | |
|----------------------------------|---|---|--|
| Name (Required) RK Quota 0102 | Business Unit US | Description | Calendar (Required) Main Monthly Calendar |
| Unit Type (Required) USD | Last Modified (Required) 1/2/2019, 2:57 PM | Period Types (Required) <input checked="" type="checkbox"/> Month <input type="checkbox"/> Quarter <input type="checkbox"/> Year <input type="checkbox"/> Decade | |

i Note

The description field can be disabled in the Quotas workspace. See the Commissions Administrator Help for more information about this and other customizations.

Quota Values Tab

The following figure shows the Quota Values tab. To view a portion of the position hierarchy, specify the top node you want to display. You can also view values for a specific period.

The screenshot shows the Quota Details page with the Quota Values tab selected. It displays a search bar, a period selector set to January 2019, and a table showing quota values for a specific position.

| Position / Participant | January 2019 |
|---|--------------|
| ▶ RK Position 0201 (RK First 0102 RK Last 0102) | \$200.00 |

Previous Next

16.2 Creating a quota

To assign quota values to positions, your user account must have at least read permission to positions. If your organization uses business units, the quota's business unit assignment should match that of the associated position. You cannot copy quotas. If you must duplicate a quota, you can export the quota to XML, edit the XML file so that the quota uses a new name, and then import the quota XML.

To create a quota:

1. Click [Quotas](#) from the **Compensation Elements** menu.
2. Click [Add \(new\)](#). Commissions do not prompt you for the effective dates for the new quota, as it does for other objects because quotas are not effective dated.
3. Enter a unique name for the quota in the detail pane of the [General Information](#) tab. The [Summary](#) panel immediately reflects your entry.

- The quota name that you define here is the one you specify later when you use the quota in a rule or formula.
4. Specify the following information for the quota:

| Field | Description |
|----------------|--|
| Business Units | If your organization has created and implemented business units, you can assign this quota to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units. |
| Description | (Optional) Enter a text description of the quota. |
| Calendar | Specify the calendar for this quota. This is the same calendar that the rules, formulas, and other associated rule elements are associated with. If necessary, you can define a different quota value for each period type. |
| Unit Type | Specify the unit type for the values stored in the quota. |
| Period Type | You must specify at least one period type for the quota. The period types available are those defined in the associated calendar. If there are values specified for a period type, you cannot modify the period type specification for the quota. |
| Last Modified | This is the date in which this specific record was last modified |

5. Specify the following display options on the *quota values* tab in the *quota* detail view:

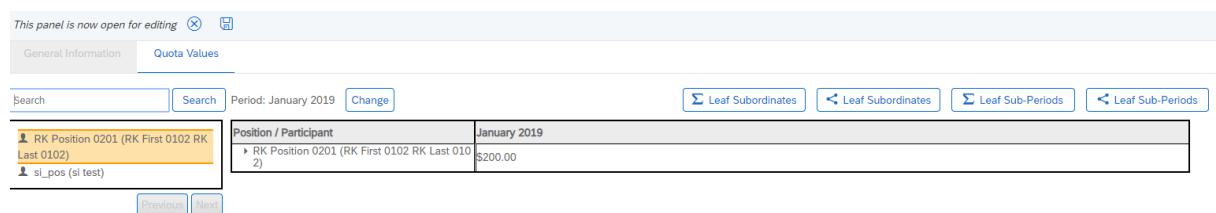
| Field | Description |
|-----------------------|---|
| Set Tree View Root to | Specify the node in the Reporting Structure to display for the quota. The Tree View Root is the starting point of the positions for the quota; all positions that report to the specified position are included in the quota Value display. If you do not specify a Tree View Root, the entire Reporting Structure displays. |
| Set Period View to | Specify the range of periods that you want to display the quota values for. You can specify a specific period of any type that is specified on the quota's General Information tab. For example, if you are using a standard calendar with months, quarters, and years, you can specify a single month, a quarter, a year, or a decade to view the quota values for. |

6. Enter the quota values. There are multiples options for entering values:
- Use the *Find Position/Payee* field to search for a specific position or participant. You can then directly enter the quota amount in the cell or the Value field (next to the *Find Position/Payee* field).
 - Calculate a value by using one of the quota functions.
 - To enter the same value in multiple cells at a time, select the cells and enter the value in the Value field (next to the Find Position/Payee field).
 - If you do not enter a value in a quota cell, Commissions considers it to be the same as a zero value.
7. Click *Save*.

Commissions saves the quota.

16.3 Editing a quota

You can edit and calculate values for a position reporting structure quickly and easily using either the *Quota Value* tab in the *Quotas* workspace. You can select edit single values, or you can edit multiple cell values simultaneously. You can also use the quota functions to calculate values based on the position hierarchy or period levels. Use **Ctrl** + **left-click** to select non-adjacent cells. You can access the quota sum and distribute functions either by right-clicking in a cell or clicking one of the function buttons.



You cannot remove period types from a quota if the quota contains any values for that period type. For example, if you have monthly values specified, you cannot remove the month period type from the quota. When editing quota values for positions, be sure to edit values for the positions that are using the quota. The quota must be used in a rule in the plan to which the positions are assigned. Otherwise, the quota is not used for any compensation processing.

i Note

If a position is added into the hierarchy after you have calculated quota values, Commissions does not automatically calculate the new position's quota values.

When you first open an existing quota, SAP Commissions displays the values according to the default period. For example, if SAP Commissions opens with a default period of January 2008, then the quota initially displays the values for January 2008.

i Note

When editing quota values, two users cannot edit values for the same quota or for the same position at the same time.

16.4 Deleting a Quota

You can delete a quota that was just created either manually or using import. You cannot delete a quota that has related results data (a calculation run has not yet occurred for the associated plan and position). Deleting a quota removes the quota and all its quota values from the Commissions. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the objects, including their remove (delete) date, and about the objects themselves. See the Commissions Administrator Help for more information on the audit log. Take extra caution when deleting quotas, as they are removed from the database. Quotas are not effective

dated, so it is a more drastic move to delete them (you cannot simply end-date them as you can objects that are effective dated).

16.5 Quota Functions Overview

A quota function is available for quotas. The quota functions are:

- Sum Subordinates
- Sum Leaf Subordinates
- Distribute to Subordinates
- Distribute to Leaf Subordinates
- Sum Sub-Periods
- Sum Leaf Sub-Periods
- Distributes to Sub-Periods
- Distributes to Leaf Sub-Periods

Related Articles

- [Sum Subordinates \[page 231\]](#)
- [Sum Leaf Sub-Periods \[page 231\]](#)
- [Sum Leaf Subordinates \[page 232\]](#)
- [Distribute to Sub-Periods \[page 232\]](#)
- [Distribute to Leaf Subordinates \[page 232\]](#)
- [Sum Sub-Periods \[page 232\]](#)
- [Distribute to Sub-Periods \[page 232\]](#)
- [Distribute to Leaf Sub-Periods \[page 233\]](#)
- [Finding Objects Related to Quotas \[page 233\]](#)

16.5.1 Sum Subordinates

The Sum Subordinates Quota function sums the values of the subordinates one level below the selected position.

16.5.2 Sum Leaf Subordinates

The Sum Leaf Subordinates Quota function sums the leaf subordinates' quota values and sums them up the position hierarchy up to the selected position. Based on the leaf subordinates, calculates the quotas for the managers up the hierarchy. If you sum subordinates' values and one of the subordinate's values is empty, Commissions omits the null value in the sum.

16.5.3 Sum Leaf Subordinates

The Sum Leaf Subordinates Quota function sums the leaf subordinates' quota values and sums them up the position hierarchy up to the selected position. Based on the leaf subordinates, calculates the quotas for the managers in the hierarchy.

If you sum subordinates' values and one of the subordinate's values is empty, SAP Commissions omits the null value in the sum.

16.5.4 Distribute to Subordinates

The Distribute to Subordinates Quota function splits the value of the selected position among the position's direct subordinates (one level below the selected position).

i Note

Due to rounding, some values might not add up as expected. For example, if you have a value of \$0.99 and you distribute to four subordinates, each subordinate then has a value of \$0.25.

16.5.5 Distribute to Leaf Subordinates

The Distribute to Leaf Subordinates Quota function splits the value of the selected position among all of the position's subordinates, down to the leaf levels in the hierarchy. The result of this operation is that the sum of all direct subordinates' values equals the selected position's quota. The quota values for subordinates two levels down equal the direct subordinates' quota value, and so on down to the leaf levels in the hierarchy.

16.5.6 Sum Sub-Periods

The Sum Sub-Periods Quota function sums the quota values for the periods that directly feed into the selected period value.

For example, if you select a year-based value cell and there are quarter-based quota values that feed into that annual quota, you can select the year quota value cell and choose the Sum Sub-Periods quota function to calculate the annual quota based on the quarter values. If there is already a value in the selected cell, Commissions replaces the value with a newly calculated value.

16.5.7 Distribute to Sub-Periods

The Distribute to Sub-Periods Quota function splits the value of the selected quota in the selected period among the periods directly within the selected period.

For example, if you select an annual quota value, Commissions distributes the quota to all four quarters (but not the months). Also, if you select a quarter value and choose the Distribute to Sub-Periods quota function, Commissions distributes the quota values just within that quarter value, not to every month in the year.

16.5.8 Distribute to Leaf Sub-Periods

The Distribute to Leaf Sub-Periods Quota function splits the value of the selected quota in the selected period among the periods within the selected period, including down to the leaf period value.

16.5.9 Finding Objects Related to Quotas

You can find data related to one or more selected quotas by selecting the appropriate object option from the *Related* pane. The available options and data returned are as follows:

- **Positions**—Returns the positions that have quota values defined for the selected quota.
- **Rules**—Returns the rules that are directly referring to the selected quota.
- **Referring Formulas**—Returns the formulas referring to the selected quota.
- **Referring Rate Tables**—Returns the rate tables referring to the selected quota.
- **Referring Lookup Tables**—Returns the lookup tables referring to the selected quota.

To find objects related to quotas:

1. Click *Quotas* from the *Plans* tab.
2. Search for the quota or quotas for which to find related data if necessary.
3. Select the quota or quotas in the *Summary* panel.
4. Select *Positions* or *Rules* in the Related.

The *Search for Related Objects* dialog displays with the name of the selected object substituted for the object name.

17 About Rate Tables

A rate table is a special-purpose table that is used to calculate incentive compensation for a step commission, where a transaction is paid at different rates when it crosses rate threshold tiers. Rate tables can only be used in incentive rules.

i Note

When using a rate table in a rule and the rate table contains a formula, if the formula uses data that limits its range of use (such as category or credit data), then you must directly assign the rate table in the rule. In this case, you cannot use a rate table variable.

Related Articles

- [Rate Table Workspace](#)
- [Creating Rate Tables \[page 234\]](#)
- [Editing Rate Tables \[page 236\]](#)
- [Finding Objects Related to Rate Tables \[page 237\]](#)

17.1 Rate Table Workspace

The *Rate Table* workspace contains two tabs: the *Rate Table* tab and the *Associations* tab.

Rate Table Tab

You can create new rate tables, modify existing rate tables, and delete rate tables from the *Rate Table* tab. You can also view and modify attainment levels from this tab.

17.2 Creating a Rate Table

When you create a rate table, you name it and select its unit type. Then you specify the layout of the table by defining the rate thresholds and their associated rates. A rate in a rate table can either be fixed or it can be a formula. You can use a rate table directly in an incentive rule, or you can use a rate table variable in the rule and then assign the rate table to the variable.

To create a rate table:

1. Click [Rate Tables](#) from the *Compensation Elements* menu.
2. Click [New](#). The *New Rate Table* dialog displays.
3. Select a calendar and specify the effective dates for the new rate table from the dialog.
4. Enter a name for the rate table in the details panel. The name identifies the rate table for selection when you define the rule elements for a plan assignment. The summary panel immediately reflects your entry.
- If your organization has created and implemented business units, you can assign this variable to one or more business units by selecting from the Business Units drop-down. You can only select business units to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units.
1. (Optional) Enter a description for the rate table.
1. Select an *Input Type* for the attainment column.
- If this rate table should be used in step commission calculations, the unit type for both the input type and return type must be percent. New rules are added to accommodate customer's needs like Stepped Commission for non-% Rate Tables
1. Select a *Return Type* for the rate column.
- In the *Rate Table* area, select operator and enter corresponding Attainment levels. All operator and attainment level entries, except the last, must be in the format <nn or <=nn, where nn is the attainment level. The last entry must be in the format >nn or >=nn. The operator for the last entry defaults to ">" or ">=" depending on the operator assigned to the previous tier. If the operator for the previous tier is "<=", the operator for the last tier defaults to ">". If the operator for the previous tier is "<", the operator for the last tier defaults to ">". This ensures that there are no gaps between tiers and each tier is appropriately inclusive or exclusive of the specified attainment value. For the lowest tier this also handles situations in which attainment falls below the first tier or is negative, such as when sold items are returned or debooked.
1. Enter as many rows as you need to define the attainment levels.
 - To add an additional row, position the cursor in a row to make it the active row, and click the [Add](#) icon from *Action*. An additional row is inserted before the active row.
 - To remove a row, position the cursor in the row and click the [Delete](#) icon.

To enter the rate for each attainment level, do one of the following:

1. Type a value.
2. Click [Formula](#) to select an existing formula,
3. Create a formulaic expression, or create a new formula, which requires that you save the formulaic expression as a new formula.
4. Click [OK](#) to save the rate table.

Related Article

- [Creating a Rate Table that Handles Negative Returns \[page 236\]](#)

17.2.1 Creating a Rate Table that Handles Negative Returns

To use a rate table to handle negative returns, de-bookings, be sure to create your rate tables carefully. For example, if you have a de-booking and you need to create an incentive that is the exact inverse of the original incentive, you can create the following rate table:

| Attainment | Rate |
|------------|------|
| < -150% | -20% |
| < -100% | -15 |
| < 100% | 10 |
| < 150% | 15 |
| >= 150% | 20% |

Using this table, a positive 125% falls into the “< 150%” attainment level, whereas a negative 125% (-125%) falls into the “< (-100%)” attainment level. You can also refer to a fixed value or insert a formula in place of a rate value.

i Note

When using this same rate table both a positive 25% and a negative 25% (-25%) falls into the same “< 100%” attainment level.

17.3 Editing a Rate Table

Editing a rate table involves any of the following operations:

1. Rename the rate table
2. Add, change, or remove the rate table's description
3. Change the rate table's input type or return type
4. Insert or delete an attainment tier

i Note

When you insert a row for an attainment tier using the [Insert](#) button, the row is inserted above the currently selected row. Commissions attempts to derive the attainment value for the new row based on the values in the row above it. For example, say you have 3 rows with attainment threshold values of 15%, 20%, and 20% with the operators <=, <= and > respectively. You then select the row with the value of 20% and the <= operator and insert a row. Commissions assigns the value of 16% to the new row based on the 15% value in the row above. However, if you select the row with the value of 16% and insert a row, the row is inserted, however, because a value between 15% and 16% cannot be derived the attainment threshold value assigned to the new row is 16% and the value in the original row is highlighted in blue indicating that it is invalid and must be modified.

5. Change the attainment threshold for an attainment tier
6. Change an attainment tier's rate
7. Add, change, or remove formulas, variables, or other rule elements in the rate table
8. Change the effective dates of the rate table

i Note

You cannot change the rate table's calendar. You must instead create a new rate table. Currently, the association between a calendar and a rate table cannot be broken or changed.

Be aware that when you edit a rate table, you edit the specified version of the rate table. For example, you have a rate table that is effective from June 2008 to the End Of Time. If, however, in August 2008 you change a rate in the rate table, it is important to know the effective dates of the change. If, for example, to back-date changes to June 2008, edit the current version of the rate table (click *Manage Versions* in the *Rate Tables* workspace). However, to make changes effective from August 2008 to the End Of Time, create a new version of the rate table, and make the changes to that new version (click *New Version* in the *Rate Tables* workspace). If you have a rate table that is no longer effective, you change the effective end date of the rate table to the required date. Do not delete the rate table if the rate table was valid for any point in time.

17.4 Deleting a Rate Table

You can delete a rate table that was just created either manually or using import. You cannot delete a rate table that is referenced by a rule or rule element or is assigned to a rate table variable. Deleting a rate table removes the rate table object from the SAP Commissions. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the rate table object, including its remove (delete) date, and information about the object itself. See the Commissions Administrator Help for more information on the audit log.

i Note

To delete a particular version of a rate table, use the *Manage Versions* button on the toolbar.

17.5 Finding Objects Related to Rate Tables

You can find data related to one or more selected rate tables by selecting the appropriate object option from the *Related* pane. The available options and data returned are as follows:

- **Rules**—returns the Rules that are directly referring to the selected rate table.
- **Positions**—returns the positions that have the rate table in position Variable Assignment.
- **Titles**—returns the titles that have the selected rate table in the title's variable assignment.
- **Referred Formulas**—returns the formulas referred by the selected rate table.
- **Referring Formulas**—returns the formulas referring to the selected rate table.
- **Referring Rate Table**—returns the rate tables referring to the selected rate table.

- **Referred Rate Table**—returns the rate tables referred by the selected Rate Table.
- **Referred Fixed Values**—returns the fixed values referred to by the selected rate table.
- **Referred Variables**—returns the variable that is referred to by the selected rate table.
- **Referring Variables**—returns the variable that has the selected rate table as the default value.
- **Referring Lookup Table**—returns the lookup tables referring to the selected rate table.
- **Referred Lookup Table**—returns the lookup tables referred by the selected rate table.
- **Quotas**—returns the quotas referred to by the selected rate table.
- **Plans**—returns the following:
 - Plans that are referring to the rules that are directly using the selected rate table.
 - Plans that have the selected rate table in the plan's variable assignment.

To find objects related to rate tables:

1. Click *Rate Tables* from the *Compensation Elements* menu.
2. Search for the rate table or rate tables for which to find related data if required.
3. Select the rate table or rate tables from the *Summary* panel
4. Select an object option from the *Related* pane, for example, *Rules*.
 - If you're searching for related plans, the plans are retrieved immediately and the results are displayed in the Plan workspace. If no results are found, the message "No Records found" is displayed.
 - If you're searching for related objects other than plans, the *Search for Related Objects* dialog displays with the name of the selected object substituted for the object name.

18 About Lookup Tables

A lookup table is a multidimensional table that you use to store a set of numeric-based values. You can then refer to the values from rules or formulas. Lookup tables are the same for each plan assignment; they aren't customizable for each position assigned to the compensation plan. The values in lookup tables can be concurrently retrieved by any number of compensation rules or shared formulas. Lookup tables store indexed values, where each value represents the intersection of multiple criteria and each individual criterion is specified by an index value. A lookup table has the following characteristics:

- Can have many dimensions.
- Stores the same type of value in all table cells (for example, a lookup table can't store both percentages and currency values in the same table).
- Returns results that don't depend on what has been already passed through the lookup table—this lookup behavior is different from the spanning behavior of rate tables.

To use the data stored in a lookup table, you include a reference to the lookup table in a rule, formula, or rule element. In the reference, you specify the data to pass to the lookup table to determine the cell value to return.

i Note

You can't copy lookup tables.

Related Articles

- [Lookup Tables Workspace \[page 241\]](#)
- [Lookup Table Information](#)
- [Building a LookupTable \[page 244\]](#)
- [References to Lookup Tables \[page 251\]](#)
- [Editing Lookup Tables \[page 253\]](#)
- [Finding Objects Related to Lookup Tables \[page 254\]](#)

18.1 About Dimension Types

When you go to view or modify a lookup table, SAP Commissions displays one entire dimension as the side (vertical) and another entire dimension as the top (horizontal). When a dimension is a side or top one you can see all indexes at once. The following table lists a description for each of the available dimension types.

Lookup Table Dimension Types

| Dimension Type | Description | Example |
|----------------|---|--|
| Numeric | Specific numbers are the dimension's indexes. | A numeric dimension could represent the number of product lines that are over quota. |

| Dimension Type | Description | Example |
|----------------|--|---|
| String | <p>A combination of text and numbers are the dimension's indexes.</p> <p>Note: You can select whether or not String dimensions are case-sensitive.</p> | A string dimension could represent event types associated with a transaction. |
| Numeric Range | <p>The dimension's indexes are represented by ranges of numbers.</p> <p>Note: For each dimension of this type, you can specify whether the low and/or high values are included in the specified ranges. By default, SAP Commissions includes both.</p> | A numeric range dimension could represent attainment percentages. |
| Category | <p>Subcategories or classifiers are the dimension's indexes. You can mix and match different levels of subcategories and classifiers as indexes.</p> <p>Note: Each dimension can refer to include index values from only one category hierarchy.</p> | A category dimension could represent product types. |
| Date Range | <p>The dimension's indexes are represented by ranges of dates.</p> <p>Note: To specify a date range for a specific cell value, use a dated list for that cell.</p> <p>Note: For each dimension of this type, you can specify whether the low and/or high values are included in the specified ranges. By default, SAP Commissions includes both.</p> | A date range dimension could be used to enforce a business-wide policy that sales transactions are processed differently according to their accounting dates. |

About Effective Dates in Lookup Tables

Lookup tables and lookup table dimensions and cells comply with the following effective date rules:

- Lookup tables have only one version; however, you can change the effective dates of this version.
- The effective date range of the dimension indexes in a lookup table must be within the date range of the lookup table.
- The effective date range of cells within a lookup table must be within the date range of the lookup table.

Left click the [Calendar](#) field button to the right of the index value to set its effective dates. Indexes that do not match the lookup table's effective dates have a custom icon. When you open a lookup table to the [Values](#) tab, you can specify the effective date range that SAP Commissions displays the values for. Cells that have multiple effective versions display with Various as the cell value. Select a cell to view its effective versions.

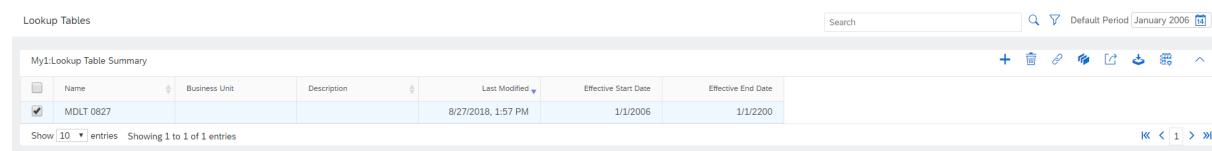
If you specify a date range that is outside the effective dates of a dimension index, that index and its values do not display.

18.2 Lookup Tables Workspace

The detail pane of the Lookup Tables workspace contains three tabs: the *Lookup Table* tab, the *Values* tab, and the *Associations* tab. You can create, modify, and delete lookup tables in this workspace.

Lookup Table

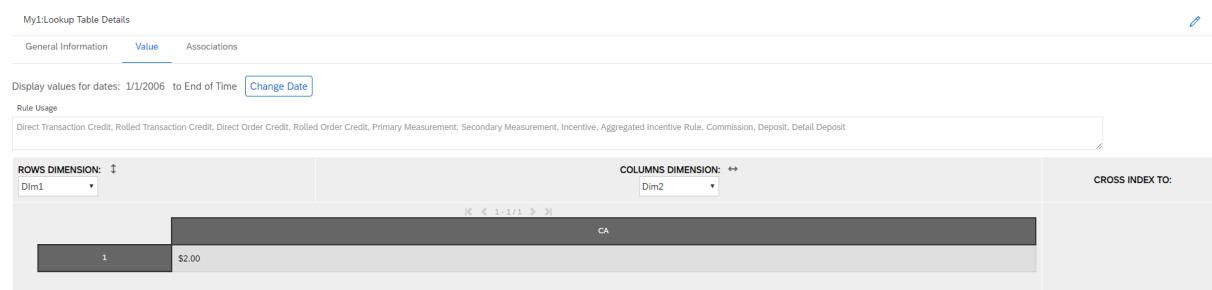
From the *Lookup Table* tab, you can create new lookup tables, modify existing lookup tables, and delete lookup tables from the *Lookup Table* tab.



A screenshot of the 'My1:Lookup Table Summary' grid. The grid has columns for Name, Business Unit, Description, Last Modified, Effective Start Date, and Effective End Date. One entry is shown: MDLT 0827. The grid includes standard navigation buttons at the bottom.

Values Tab

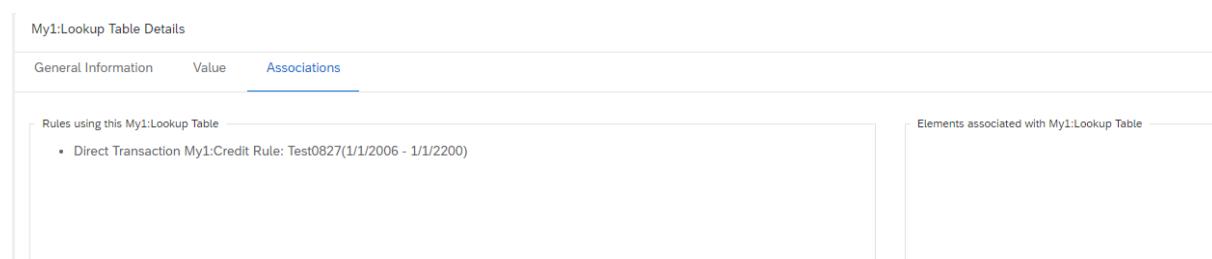
From the *Values* tab, you can specify effective dates for a lookup table's dimension index.



A screenshot of the 'My1:Lookup Table Details' page, specifically the 'Value' tab. It shows a grid with 'ROWS DIMENSION' (Dim1) and 'COLUMNS DIMENSION' (Dim2). The grid contains one row labeled '1' and one column labeled 'CA'. The value '\$2.00' is displayed in the cell at the intersection of row 1 and column CA. There is also a 'CROSS INDEX TO:' section.

Associations Tab

From the *Associations* tab, you can view the rules that use the lookup table and the elements associated with the lookup table.



A screenshot of the 'My1:Lookup Table Details' page, specifically the 'Associations' tab. It shows two sections: 'Rules using this My1:Lookup Table' and 'Elements associated with My1:Lookup Table'. The 'Rules using this My1:Lookup Table' section lists a single rule: 'Direct Transaction My1:Credit Rule: Test0827(1/1/2006 - 1/1/2200)'. The 'Elements associated with My1:Lookup Table' section is currently empty.

18.3 Tips in Using Lookup Tables

Here are some tips when using lookup tables:

- Map out your lookup table beforehand. Before you create your lookup table, map out what your lookup table should contain and how it should look. For example, use a spreadsheet program to make a grid representation of the new lookup table. Planning ahead greatly reduces the time it takes to enter your data, and also helps you to better visualize the lookup table.
- Decide on the number of dimensions before you enter cell values. You should decide on the number of dimensions before you begin entering cell values. You cannot add dimensions after cell values have been entered. Adding, modifying, or removing indexes after cell values have been entered is acceptable.
- Decide which dimensions to view as the top and side dimensions. The first dimension that you add automatically displays as the side dimension, and the second dimension displays as the top dimension. You can change which dimensions are top, side, or other when viewing a lookup table, but these view choices are not saved.
- Complexity can affect size and performance. Be aware that a more complex lookup table can potentially take longer to process. For example, if your lookup table has multiple dimensions, many indexes in each dimension, and/or many references to constants or shared formulas, your rule processing speed might be impacted. When Commissions opens a lookup table, the entire table is opened; therefore, large lookup tables might take longer to open.
- Consider what parameters you want to pass through the lookup table. When you design your lookup table, you must consider how it should be implemented and what parameters must be passed to it. For example, if you build a dimension of the string type, consider what string you are going to specify as the parameter in the Lookup Table function. Also, you must ensure that the string to be passed to the lookup table is available in the rule.

18.4 Restrictions Involved in Lookup Tables

A lookup table's range of use is restricted by the combined context of the referring item (the rule or formula) and the lookup table.

An Indicator of a Lookup Table's Range of Use

When you open a lookup table, SAP Commissions displays icons that correlate to the types of rules in which you can use that lookup table. These icons change depending on the values you specify in the lookup table.

Restrictions Based on a Lookup Table's Contents or Context

The following general rules apply to how SAP Commissions restricts the use of lookup tables based on what is included in the lookup table or where the lookup table is used:

- If a lookup table includes a category type of dimension, that lookup table can be referenced from the following types of rules only: any credit rules, primary measurement rules, and per-credit commission incentive rules. This restriction occurs because those are the only rules that have access to classifier information, either from the transaction or the credit. The same restriction applies if the lookup table is referenced in a shared formula. The shared formula, in addition to any constraints it itself has, can only be used in credit rules, primary measurement rules, and per-credit commission incentive rules.
- If a lookup table has a cell value that contains a formula, the lookup table's range of use is further constrained by the rule type restrictions of the formula. For example, a lookup table with a category type dimension references a formula that is available only to direct and indirect credit rules, that lookup table's range of use is restricted to only direct and indirect credit rules. If a lookup table includes references to multiple formulas, the lookup table's range of use is restricted to the set of rules that can use all of the referenced formulas.
- If a lookup table references a formula that uses fixed values as input, the lookup table's range of use is not further restricted. Formulas that use fixed values as input can be used in any type of rule (as well as rate tables).
- The lookup table's return type limits its range of use. The unit type specified as the lookup table's return type must match the unit type requested in the referencing rule or formula. For example, if a lookup table contains data values that are of the percent unit type, a function that calls for a USD value cannot reference that lookup table.
- The parameters that a formula passes to a lookup table can restrict the formula's range of use. If a formula includes a reference to a lookup table, the parameters passed to the lookup table restrict the types of rules that can use that formula. For example, if a formula references a lookup table that does not include a category type of dimension, but the formula specifies that the Transaction.GenericAttribute1 field be passed as one of the lookup table parameters, the formula can only be used in direct credit rules.
- Choose the lookup table dimension type based on its intended usage. Be sure that the unit type for numeric dimensions is appropriate for the field(s) you are passing as parameters to the lookup table. For example, if you intend to pass a integer field (such as Transaction.Number of Units) as a parameter to the lookup table, be sure that the lookup table is integer-based. In this case, a lookup table that uses the quantity unit type would not accept an integer-based value as a parameter.

18.5 Options for Cell Values in a Lookup Table

You can specify a value for a cell in a lookup table by specifying one of the following:

- A literal value (directly type it in)
- A fixed value
- A fixed value variable
- A formula
- An effective dated list of values for a cell
- A lookup table
- A lookup table variable

- Nothing (a null value)

Only objects (fixed values, fixed value variables, formulas, and lookup tables) associated with the current default calendar can be specified. You can switch the kind of value in a cell by simply replacing the current value; for example, replace a constant reference with a literal value. Dated list values require a little more work to replace. You can also select multiple cells and edit the value for all at once using the cell value field.

About Literal Values in Lookup Tables

You can directly enter a number to store a literal value. You do not have to specify the unit type symbol (for example, "r;\$" if the table's return type is USD). SAP Commissions displays the appropriate symbol automatically after you type a number and press Enter. If you try to enter a number and a unit type symbol that differs from the lookup table's return type, SAP Commissions outlines the cell in red to indicate the error (for example, if the lookup table's return type is percent and you enter a \$). You can also choose to leave a cell value blank (a null value).

About Cell Value Effective Versions in Lookup Tables

You can specify different cell values that are effective for different effective dates. Each version can have a different cell value.

For example, an organization runs a special promotion for the month of February 2006 for sales transactions worth more than \$10,000 for products sold directly by salespeople in the Bronze performance tier. For the month of February, the rate is increased by 0.5%. In this example, the effective versions of cell values would look something like what is shown in the following figure.

18.6 Building a Lookup Table

Creating a Lookup Table

To create a lookup table, perform the following steps:

1. Click *Lookup Tables* From the *Compensation Elements* menu.
2. Click *Add(new)*.
3. Choose an *Effective Start and End Date*.
4. Click *Ok*. This creates a new empty *Lookup Table*.
5. Specify the following *General Information* from the *Lookup Table Details* panel:

| Field | Description |
|----------------------|---|
| Name | Enter a name for the lookup table. This is the name that displays in a compensation rule or shared formula when the lookup table is referenced. |
| Description | (Optional) Enter a description. |
| Business Units | If your organization has created and implemented business units, you can assign this rule to a business unit by selecting from the Business Units drop-down. You can only select a business unit to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units. |
| Return Type | Select a return type for the lookup table. All cell values in the lookup table are of this unit type. See the Commissions Administrator Help for more information on unit types. |
| Calendar | |
| Last Modified | This is the date in which this specific record was last modified |
| Effective Start Date | This is the date in which this specific record becomes effective |
| Effective End Date | This is the date in which this specific record becomes inactive |

- ○ At this point, you are ready to create dimensions, their indexes, and the associated values, as discussed later in this section.
- To ensure that SAP Commissions treats null cell values as zero values, select the Treat empty values as Zero option. By default, this option is not selected.

6. Click [Save](#).

i Note

To complete your lookup table, add a dimension.

18.6.1 Adding a Dimension to a lookup table

When viewing a lookup table, the first dimension that you define is, by default, set as the side dimension; the second dimension that you define becomes the top dimension by default. You can change the top and side dimensions when viewing a lookup table, but the default settings return when you open the lookup table (in the Edit Table Cells dialog box). You can add a dimension to a lookup table just after you create the table, or you can

add a dimension to an existing lookup table (provided it does not contain any cell values). If a lookup table contains any cell values, SAP Commission does not allow you to add or delete dimensions. The indexes for a particular dimension in a lookup table are the criteria by which the lookup table function locates an individual cell value.

i Note

Indexes are also effective dated.

You can add indexes to a dimension just after you add the dimension, or to a dimension, you have already created.

To Add a Dimension to a lookup table:

1. Select *Lookup Tables* from the *Compensation Elements* menu.
2. Search and Select a *Lookup Tables* or create a new lookup table from the *Summary* panel.
3. Click *Add Dimension* from *Define Dimensions* of the details panel. This display the *Add Dimensions* dialog.
4. Enter Dimension: *Name*, *Type* and *Input Unit Type*. This is the name by which you select the dimension when viewing it.
5. Click *Finish*.

| Dimension Type | Parameters |
|----------------|--|
| Numeric | <p>Enter numbers as indexes.</p> <p>Specify the input unit type associated with the number that should be passed to the index values.</p> |
| String | <p>Enter text strings as indexes.</p> <p>Select the Ignore Case option to specify that lookups on this dimension are not case-sensitive.</p> |
| Numeric Range | <p>For each index, enter a range of numbers.</p> <p>Select the Include Low Value and/or Include High Value options to include the low or high values in each range of numbers.</p> <p>Specify the input unit type associated with the number that should be passed to the index values.</p> |
| Category | <p>After you specify Category as the dimension type, specify the category hierarchy (root) to use. These are the same categories listed in the Launch Pad window.</p> <p>Each index must be from the same category hierarchy, but the indexes can be any combination of subcategories and classifiers.</p> |
| Date Range | For each index, enter a range of calendar dates. |

i Note

You cannot save the dimension without adding at least one index.

6. For any dimension type, you can click *Sort* to sort the indexes in alphanumerical (increasing) order. However, after you sort the list you cannot re-sort it.
 - If you are specifying a category-based dimension, you specify the category root in the *Dimension Options* area.
7. After you have entered the new dimension name, the type, and the category root (if you specified the category dimension type), you are ready to add the indexes to the dimension. You must have at least one index in a dimension.
 - If you are specifying a numeric range dimension, you specify the *Input Unit* type. You can specify to include the Low Value, High Value, or both.
8. In the Dimension Indices area, click the *Add (new) field* button to add an index.
 - For category dimensions, specify the subcategory or classifier. You can pick from a list, enter part of the name, or do a search.
 - For Date Range or Numeric Range dimensions, the index is a range of values. There are two columns: one for the low end of the range and one for the high end of the range.
 - For Date Range dimensions, you can edit and enter a date, or click the *Add* button to open the *Dimension Index Effective Dates* dialog from which you can select a date.
 - SAP Commission adds an empty row in the Value column (in the Dimension Indices area).
9. To add more indexes, click the *Add (new) field* button, click the new row, and enter the value. Continue until you have added all the indexes.
10. Click *Save*.

Removing a Dimension from a Lookup Table

Removing a dimension causes all cell values to be deleted from the lookup table.

To remove a dimension from a Lookup Table:

1. From the *Plans* tab, click lookup tables.
2. If necessary, search for the lookup table from which to remove the dimension
3. In the *Summary* panel, select the lookup table.
4. From the lookup table tab, select the dimension from the *Dimensions* area and click *Delete*.
 - **i Note**

If the lookup table contains any cell values, SAP Commission does not allow you to add or delete dimensions
5. In the warning dialog, click *Yes* to continue, or click *No* to cancel the remove operation.
 - If you clicked *Yes*, SAP Commission removes the selected dimension from the current lookup table and deletes all cell values from the lookup table.

6. Click **Save**.

18.6.2 Removing a Dimension from a Lookup Table

Removing a dimension causes all cell values to be deleted from the lookup table.

To remove a dimension from a lookup table:

1. Click *Lookup Tables* from the *Compensation Elements* menu.
2. Search for the lookup table from which to remove the dimension
3. Select the lookup table in the *Summary* panel
4. Select the dimension from the *Dimensions* area
5. Click *Delete* from *Lookup Table*.

○ **i Note**

If the lookup table contains any cell values, SAP Commissions does not allow you to add or delete dimensions.

6. Click *Yes* to continue, or click *No* to cancel the remove operation in the *Warning* dialog
 - ○ If you clicked *Yes*, SAP Commissions removes the selected dimension from the current lookup table and deletes all cell values from the lookup table.
7. Click **Save**.

18.6.3 Removing an Index from a Lookup Table's Dimension

An index can be removed whether or not the lookup table has cell values entered. If there are cell values, the ones that apply to the index are removed along with the index.

i Note

You can either remove an index or end-date the version of the index.

To remove an index from a lookup table's dimension:

1. Click *Lookup Tables* from the *Compensation Elements* menu.
2. Search for the lookup table from which you want to remove the index.
3. Select the lookup table in the *Summary* panel
4. Select the index, which is in the *Details* panel of the *Dimension Indices* area.
5. Click *Delete*. Commissions removes the selected index and any cells that were associated with the index.
6. Click **Save**.

18.6.4 Editing Cells in a Lookup Table

Be sure that all the dimensions are specified for the lookup table before you enter any cell values. After cell values have been entered in a lookup table, changes to the lookup table's dimension causes SAP Commissions to delete all cell values.

To edit an individual cell value in a lookup table:

1. Click *Lookup Tables* from the *Compensation Elements* menu.
2. Search for the lookup table to be modified.
3. Select the lookup table in the *Summary* panel.
4. Click the *Values* tab in the *Detail* panel.
5. Select the cell to be edited in the lookup table
6. Edit the value by doing one of the following:
 - If the value is a literal, type a new value.
 - If the value is a formula or formulaic expression, direct data entry into the cell is disabled.

To edit the value, click the *Formula* field button in the selected cell and enter a formula, formulaic expression, or choose from any legal moves (such as a fixed value variable). You can select an existing formula or create a new one. To remove a formula and change the value to a literal instead, you must first delete the formula in the formula editor.

i Note

You can have null values in lookup tables (some cells can be empty). You can also choose to specify that the null values are considered as zero values during calculation processing by selecting the Treat empty values as Zero option from the *Lookup Table* tab

7. To create separate effective versions of the cell value, select the cell, and in the lower pane you can create, edit, and delete effective versions (as you do elsewhere in the product).
8. Click *Save*.

To edit multiple cell values in a lookup table:

1. From the *Plans* tab, click *Lookup Tables*.
2. If necessary, search for the lookup table to be modified.
3. In the *Summary* panel, select the lookup table.
4. In the detail pane, click the *Values* tab and click on edit button.
5. In the lookup table, select the cells to be edited using `Shift` + `left-click`. All cells selected must be of the same type, either literals or formulas.
6. To edit the cell values, do one of the following:
 - If the value is a literal, type a new value.
 - If the value is a formula or formulaic expression, click the Formula field button to select a different formula, create a new formulaic expression, or create a new formula, which requires that you save the formulaic expression as a new formula. To remove a formula and change the value to a literal instead, you must first delete the formula in the formula editor.<<01/03/07: DI bug 32663.>>

i Note

You can have null values in lookup tables (some cells can be empty). You can also choose to specify that the null values are considered as zero values during calculation processing by selecting the Treat empty values as Zero option from the *Lookup Table* tab.

7. Click *Save*.

18.6.5 Entering a Fixed Value Variable in a Lookup Table Cell

You can include a fixed value variable in a lookup table cell so that you can customize that particular cell's value for each position assignment assigned to the associated compensation plan. When you later assign a fixed value to the variable, you can only assign fixed values that are the same as the lookup table's return type.

To enter a fixed value variable in a lookup table cell:

1. From the *Compensation Elements* menu, click *Lookup Tables*.
2. If necessary, search for the lookup table to be modified.
3. In the *Summary* pane, select the lookup table.
4. In the detail pane, click the *Values* tab.
5. In the lookup table, select the cell to which to add a fixed value variable.
6. Click the *Formula* field button to open the *Formula* dialog.
7. Create or select a *Fixed Value Variable* by doing one of the following:
 - To create a new fixed value variable, type * in the formula edit pane to display the list of legal moves. Select *Create a New Fixed Value Variable* or select *Fixed Value Variable* from the *References* list in the legal moves pane. Type * and select *Create a New Fixed Value Variable*.
 - To select an existing fixed value variable, select *Fixed Value Variable* from the list of legal moves or select *Fixed Value Variable* from the *References* list. Type the name of the fixed value variable to use auto-matching, or type * and select the fixed value variable from the list.

i Note

A quick indicator that a lookup table cell contains either a fixed value, a variable, or a formula reference is that you see a string value in the cell. Lookup tables can only return numeric-based values.

8. Click *Save*.

18.6.6 Entering Formulas and Expressions in a Lookup Table Cell

You can either enter a formula or a formulaic expression in a lookup table. The result of the formula or expression is the cell's value. When choosing a formula, choose a formula that returns a value with a unit type that matches the lookup table's return type. For example, if a lookup table's return type is percent, do not include a formula that returns a value in USD. Do not use a lookup table to directly refer to another lookup table. Instead, create a formula that refers to the lookup table, and then use the formula in the other lookup table. The use of a formula instead of a direct reference to a lookup table from a lookup table cell is required for calculation processing.

Entering an Expression in a Lookup Table Cell

To enter a formulaic expression in a lookup table cell:

1. Click *Lookup Tables* from the *Compensation Elements* menu.
2. Search for the lookup table to be modified.
3. Select the lookup table in the *Summary* panel.
4. Click the *Values* tab in the *Detail* panel.
5. Click the lookup table cell to select it in the cell values area
6. Click *Formula* to open the Formula dialog. In the *New Formula* dialog, you can select items from the list of legal moves to construct your expression.
7. Click *Ok* to bring the expression over to the lookup table cell.
8. Click *Save*.

Entering a Formula Reference in a Lookup Table Cell

To enter a formula reference in a lookup table cell:

1. Click *Lookup Tables* from the *Plan* menu
2. Search for the lookup table to be modified.
3. Select the lookup table in the *Summary* panel.
4. Click *Values* in the *Detail* panel.
5. Click the lookup table cell to select it in the cell values area.
6. Click *Formula*. In the *Formula* dialog, select Formula from the list of legal moves.
7. Select formula from the *Reference* section of the *Legal Moves* pane.
8. Select an existing formula, by either typing the name of the formula, or typing and selecting the formula from the list. Or, create a new formula, by typing , and then selecting ” *Create a New Formula*.
 - o **i Note**

A quick indicator that a lookup table cell contains either a fixed value, a variable, or a formula reference is that you see a string value in the cell. Lookup tables can only return numeric-based values.
9. Click *Ok*.

18.7 References to Lookup Tables

Creating a Reference to a Lookup Table

You can use a value from a lookup table in a formula, rule, or another rule element anywhere you can use a formula or formulaic expression. To access and use data from a lookup table, you include a reference to the lookup table. In the reference, you specify the data to pass to the lookup table, which in turn determines the cell value that is returned.

To include a reference to a lookup table:

1. Begin from either a compensation rule, formula, or rule element. From wherever you start, navigate to a [New Formula](#) or [Edit Formula](#) dialog.
 - o In the formula dialog, specify the return type. The return type corresponds to the unit type of the lookup table's cell values. For example, to reference a lookup table that stores USD values, specify the return type as currency.
2. Click the [Formula](#) edit panel to activate legal moves.
3. In the [Legal Moves](#) pane, in the [References](#) column, double-click [Lookup Table](#) or type the first few letters of the name to select it.
4. In the [Formula](#) section, directly after the lookup table, you can do either of the following to specify the lookup table:
 - o Type * to pick from a list of all lookup tables.
 - o Type the beginning of the fixed value name to pick from a subset of all lookup tables.
5. Double-click each parameter in the [Formula](#) section, and then either type a literal or select an item from [Legal Moves](#).
6. Click [Save](#) when you have finished specifying the parameters

18.7.1 Referring to Lookup Tables with Category Dimensions

When referring to a lookup table that has one or more category dimensions, you do not specify an input for each category dimension. (For other dimension types, you have to specify the field to pass to the lookup table). The following figure shows a four-dimensional lookup table with two category dimensions.

My1.Lookup Table Details

General Information Value Associations

Standard Fields

| | | | |
|---|----------------------------|--|--|
| Name (Required) MDLT 0827 | Business Unit | Description | Calendar (Required) Main Monthly Calendar |
| Return Type (Required) USD | Treat empty values as zero | Last Modified (Required) 8/27/2018, 1:57 PM | Effective Start Date (Required) 1/1/2006 |
| Effective End Date (Required) 1/1/2000 | | | |

My1.Lookup Table Structure

Dimensions (2)

| Name | Type | Dimension Options |
|------|---------|--|
| Dim1 | Numeric | Input Unit Type: integer Case Not Ignored |
| Dim2 | String | |

Dimension Indices (1)

| Define Indices | | |
|----------------|----------------------------------|--------------------------------|
| Value 1 | Effective Start Date 1/1/2006 | Effective End Date 1/1/2000 |

Instead of passing a field in the reference to the lookup table, SAP Commissions looks for the classification records that match category dimension indexes. All classification matches are passed to the lookup table for a possible match with the lookup table dimension. The more category dimensions there are, the more fields have to match on the classification record against the lookup table dimensions. The classification records that get passed are those that are associated with the transactions related to the referring rule or rule element.

18.8 Editing a Lookup Table

To edit a lookup table involves any of the following operations:

- Rename the lookup table (any rules or shared formulas that refer to the lookup table are updated automatically)
- Add, change, or remove the lookup table's description
- Change the type of value stored in the lookup table's cells (if you do this, SAP Commissions clears all cell values).
- Change the dimension type of a dimension (if you do this, SAP Commissions removes all indexes associated with that dimension)
- Add or remove a lookup table's dimension.
- Add, rename, replace, or remove indexes within a dimension (renaming a dimension is acceptable, but adding or removing dimensions causes SAP Commissions to delete all cell values)

i Note

You cannot edit the structure (return type and number and types of dimensions and their order) of a Lookup Table that is assigned as the default of a Lookup Table Variable being used in a formula, rule, plan or another lookup table.

- Edit cell value or bulk edit cell values in a lookup table.
- Add, change, or remove formulas, variables, or other rule elements in the lookup table
- Change the effective dates of the lookup table, edit or create new effective versions of dimension indexes, or edit or create new versions of cell values.

i Note

You cannot change the lookup table's calendar. You must instead create a new lookup table. Currently, the association between a calendar and a lookup table cannot be broken or changed.

Be aware that when you edit a lookup table, you can edit either the effective dates of the entire lookup table, or you can edit the effective versions of the dimension indexes or the cell values. For example, suppose you have a Bonus Rates lookup table that is effective from March 2008 to the End Of Time. If in April 2008 you change a rate in the lookup table, it is important to know the effective dates of the change. If, for example, to back-date changes to March 2008, edit the effective dates of the lookup table (click *Modify Dates* in the *Lookup Tables* workspace). However, to make the changes effective from April 2008 to the End Of Time, create a new version of the cell value (from the Values tab in the *Lookup Tables* workspace and click the *Create* button), and make the changes to that new version. If you have a lookup table that is no longer effective, you should change the effective end date of the lookup table to an appropriate date. Do not delete the lookup table if it was valid for any point in time.

18.8.1 Deleting a Lookup Table

You can delete a lookup table that was just created either manually or using import. You cannot delete a lookup table that is referenced by a rule or rule element or is assigned to a lookup table variable.

Deleting a lookup table removes the lookup table object from the SAP Commissions. However, the audit log in the *Audit Log* workspace retains information on the actions performed on the lookup table object, including its

remove (delete) date, and information about the object itself. See the Commissions Administrator Online Help for more information on the audit log.

18.9 Finding Objects Related to Lookup Tables

You can find data related to one or more selected lookup tables by selecting the appropriate object option from the *Related* pane. The available options and data returned are as follows:

- **Rules**—returns the rules that are directly referring to the selected lookup table.
- **Referring Formulas**—returns the formulas referring to the selected lookup table.
- **Referred Formulas**—returns the formulas referred to by the lookup table cells.
- **Referred Fixed Values**—returns the fixed values referred to by the selected lookup table.
- **Referred Variables**—returns the variables referred to by the selected lookup table.
- **Referring Rate Tables**—returns the rate tables referring to the selected lookup table.
- **Referred Rate Tables**—returns the rate tables referred to by the selected lookup table.
- **Quotas**—returns the quotas referred to by the selected lookup table.
- **Referring Lookup Tale Variables**—returns the variables referring to the selected lookup table.
- **Referred Lookup Tables**—returns the lookup tables referred to by the selected lookup table.
- **Referring Lookup Table**—returns the lookup tables referring to the selected lookup table.
- **Plans**—returns all the plans that are referring to the rules that are directly using the selected lookup table.

To find objects related to lookup tables:

1. Click *Lookup Tables* from the *Compensation Elements* menu.
 2. Search for the lookup table or lookup tables for which to find related data.
 3. Select the lookup table or lookup tables in the *Summary* panel
 4. Select an object option, for example, *Rules* in the *Related* pane
- If you are searching for related plans, the plans are retrieved immediately and the results are displayed in the *Plan* workspace. If no results are found, the message *No Records Found* is displayed.
 - If you are searching for related objects other than plans, the Search for *Advanced Related Objects* dialog displays with the name of the selected object substituted for the object name.

19 About Functions

Functions are predefined formulas provided by SAP Commissions that you can use in compensation rules to calculate and specify values or conditions. In general, functions fall into groups based on their use. For example, a group of functions, called order-level functions, is provided to calculate summary information related to transactions on an order for use in writing credit rules based on orders. Most functions are accessible from the functions listing in the *Legal Moves* pane. A few functions are accessible from the data fields listing in the *Legal Moves* pane. These functions are known as data field functions.

The list of functions that are available in SAP Commissions in a particular context depends on the kind of formula, the return type of the formula, and the input to the formula. The available functions are listed alphabetically in SAP Commissions. Also, new rules are added to accommodate customer's needs like interpolate functions. In most cases, functions require one or more input parameters and produce an output result. For example, the Concatenate Two Strings function takes two strings as input parameters and produces a string as output.

Because of this basic input/output structure, functions can be nested within other functions in a formula. For example, you can create a formula using the Convert String to Value function, then use that formula as one of the input parameters to a second formula that includes the Round function.

FormulaA = Convert String to Value

(Participant.GenericAttribute1, "USD")

FormulaB = Round(FormulaA,2)

i Note

When discussing date formats, information in this chapter assumes that you are using the English (United States) locale. If you are using another locale, date formatting could be different.

Related Articles

- [Primary Functions \[page 256\]](#)
- [Sum Functions \[page 265\]](#)
- [Order-Lever Functions \[page 273\]](#)
- [Text Search Functions \[page 278\]](#)
- [Date Functions \[page 280\]](#)
- [Ranking Functions \[page 290\]](#)
- [Proration Functions \[page 295\]](#)

19.1 Primary Functions Overview

A primary function is one that is available in most contexts and does not fit into one of the other groupings of functions. The primary functions are:

- Absolute
- Calculate Result
- Concatenate Two Strings
- Convert Boolean to Value
- Convert Date to Effective Date
- Convert Date to Fiscal Date
- Convert Null to Value
- Convert String to Upper Case
- Convert String to Value
- Convert Value to Boolean
- Current Period
- Equals (Ignore Case)
- Is Null and IsDateNull
- Is In Range
- Max and Min
- Other Position's Quota or Fixed Value
- Participant.Version() and Position.Version() Functions
- Position Proration Functions
- Power of
- Round
- Set Unit Type
- Source.Credit.Relationship.Source.Version ()
- Transaction.Payee Pre-Assignment () Functions
- Transaction.Classifier()
- Trim String
- Trunc

Related Articles

- [Absolute \[page 257\]](#)
- [Calculate Result \[page 257\]](#)
- [Concatenate Two Strings \[page 258\]](#)
- [Convert Boolean to Value \[page 258\]](#)
- [Convert Null to Value \[page 258\]](#)
- [Convert String to Upper Case \[page 258\]](#)
- [Convert String to Value \[page 259\]](#)
- [Convert Value to Boolean ↗](#)

- [Current Period \[page 259\]](#)
- [Equals \(Ignore Case\) \[page 260\]](#)
- [Is Null and IsDateNull \[page 260\]](#)
- [Is In Range \[page 260\]](#)
- [Max and Min \[page 261\]](#)
- [Other Position's Quota or Fixed Value \[page 261\]](#)
- [Participant.Version\(\) and Position.Version\(\) Functions \[page 262\]](#)
- [Round \[page 262\]](#)
- [Set Unit Type \[page 263\]](#)
- [Transaction.Payee Pre-Assignment \(\) Functions \[page 263\]](#)
- [Transaction.Classifier\(\) \[page 264\]](#)
- [Trim String \[page 264\]](#)
- [Trunc \[page 264\]](#)

19.1.1 Absolute

Description: Use Absolute to calculate the absolute positive value of a number.

Input: A numeric value.

Output: A numeric value.

Formula: $\text{Absolute} = \text{Value}(\text{Transaction.Value})$

For example, if the input value is \$130.00, the output value is \$130.00; if the input value is -\$25.00, the output value is \$25.00.

19.1.2 Calculate Result

Use Calculate Result to extract a value from a rate table; the function returns a single value per input value. This function looks up a value on a rate table without traversing rate rows (this is unlike stepping through a rate table, where the value is derived from traversing rows). A rate table used solely for a Calculate Result function can use any unit type for the lookup and the result columns - (USD in, quantity out) for example. A step commission rate table can only use the same unit type (percent in, percent out). If you want to have more than two dimensions, use a lookup table instead.

Input:

- Rate Table - Specify either a rate table or a rate table variable. If you specify a rate table variable, it acts as a placeholder, and the actual rate table must be assigned at the variable, plan, title, or position level.
- Attainment Rate - Enter or select the value that determines which row of the rate table to use, based on the second column (attainment) in the rate table. The attainment rate is normally specified by selecting a Measurement but can be specified by selecting a Fixed Value, a Fixed Value Variable, a Formula, an Incentive, a Lookup Table, a Lookup Table Variable, or a Quota.

Output: The value according to the third column is returned.

Formula: $\text{Calculate Result} = (\text{Rate Table}(\text{BookedRev_RT})), (\text{Attainment}(\text{AP Simple Revenue PM:month}))$

For example, if a participant achieves 104% of attainment, and using rate table with the following attainment tiers and rates (0 - 100% = \$3000; 100%+ = \$5000), Calculate Result would return a value of \$5000.

19.1.3 Concatenate Two Strings

Use the Concatenate Two Strings function if you want to use the combination of two strings in a formula.

Input: Two strings.

Output: One string (String return type)

Formula: Concatenate Two Strings (Participant.ID, Position.GA1_Region)

19.1.4 Convert Boolean to Value

Description: Converts a Boolean value to a numeric value.

Input: A Boolean value.

Output: A numeric value (Percent, Integer, or Quantity return type)

Formula: Convert Boolean to Value(true) = 1

19.1.5 Convert Null to Value

Description: Converts a null value to a numeric value.

Input: Two numeric values: First Value and Second Value. If the First Value parameter is not null, this value is returned as output. However, if the First Value parameter is null, the Second Value parameter is returned as output.

Output: Either the value specified for the First Value or the Second Value as explained above.

Formula: Convert Null to Value (Position.GenericNumber1,0)

For example, the formula example uses Position.GenericNumber1 if it is not null, or 0 if it is null.

19.1.6 Convert String to Upper Case

Description: Use Convert String to Upper Case if you want to convert a text string to all capital letters. For example, you could use this function in a classification rule to ensure that a transaction field matches a classifier field.

Input: A string field.

Output: The same string, in all capital letters (String return type)

Formula: Convert String to Upper Case("market")="MARKET"

For example, the example converts market to MARKET.

19.1.7 Convert String to Value

Description: Use Convert String to Value to extract a numeric string from an alphanumeric field (often from a generic attribute) in the database, then apply a unit type to the string so it has the correct format for use with other mathematical elements. This makes the string a “number” in a sense that Commissions can interpret it.

Input:

- Numeric string—The string to be converted
- Unit Type—The type of value to create.

Output: A numeric value with the specified unit type.

Formula: Convert String to Value = (string (Participant.Generic Attribute 1), Unit type (USD))

For Example, Extract the numeric string in a participant first generic attribute field (that stores a conversion rate, for example) and specify a unit type of USD.

i Note

When specifying a percent-based unit type, the percentage is based on the created value. A value of 0.1 becomes 10%, and a value of 1.0 becomes 100%.

19.1.8 Convert Value to Boolean

Description: Converts a numerical value to a Boolean value.

Input: A numeric value.

Output: A Boolean value (true or false).

Formula: Convert Value to Boolean(Transaction.Generic Number1)=true

For example, If Transaction.Generic Number1 equals 1, the numeric value is converted to Boolean.

19.1.9 Current Period

Description: Use Current Period to ensure that a rule is only fired in the appropriate period.

Input: A period from the list of all periods in current default calendar.

Output: A Boolean value (true or false)

For example, If you write rules that create Quarterly or Yearly or higher level incentives (any non-leaf level persistent Incentive), you would use Current Period in the condition to make sure the rule only fires in a valid

period. For example, a year incentive should have the condition “Current Period = December 1999?”. A quarter incentive would include the following:

Current Period = March Or
Current Period = June Or
Current Period = September Or
Current Period = December

19.1.10 Equals (Ignore Case)

Description: Use this function to make two items with different capitalization considered as the same for rule processing purposes. Enter two strings are considered equal.

Input:

- First String—The character string used for comparison.
- Second String—The character string that the first string is compared against.

Output: A Boolean value (true or false).

Formula: Equals Ignore Case = (First String (Position.Name), Second String ("Sales rep"))

For example, You might want to ensure that commissions involving sales representatives receive the appropriate amounts from measurements labeled either 'Sales Rep' or 'Sales rep.'

19.1.11 Is Null and IsDateNull

Description: Use the Is Null function to test if a field is null (does not contain a value). Use the Is Date Null function to test if a date field is null.

Input: Specify the field that is to be tested for a null. If the field is null, the function returns a “true,” otherwise the function returns a “false.”

Output: A Boolean value (true or false).

Formula:isNull (Transaction.Generic Attribute 1)

For example, check to verify that the first generic attribute field on the transaction contains a value.

19.1.12 Is In Range

Description: Determines if a specified numerical value is within a defined range.

Input: This function takes the following parameters:

- Input value (a numerical value)

- Low value
- Is range inclusive of low value
- High value
- Is range inclusive of high value

Output: A Boolean value (true or false)

For example, If the range is 5 to 10, an input value of 7 returns true. An input value of 5 is in the range if the first Boolean (Is range inclusive of low value) is true; otherwise, it is not in the range. An input value of 10 is in the range if the second Boolean (Is range inclusive of high value) is true; otherwise, it is not in the range.

19.1.13 Max and Min

Description: Use these two functions to select the maximum or minimum of two values.

Input: Enter or select the two values that you want compared to determine which is the greater or lesser value.

Output: In the formula, the one that satisfies either maximum or minimum, whichever is selected, is used.

Formula: Max = First value (Source Credit.Transaction.Num Units), Second value (Fixed Value

Variable:MaxNumberOfUnitsOnTxn)

For Example, compare the number of units sold on a transaction to the maximum number of units a sales representative can receive credit for.

19.1.14 Other Position's Quota or Fixed Value

Description: Use this function to retrieve a quota or other fixed value from another position. You use a fixed value variable as a placeholder for the fixed value. Commissions locates the fixed value that you assign to the variable (at the position, title, plan, or variable level) along the roll relationship of the specified roll type. You can use this function anywhere a fixed value or fixed value variable is valid.

Input: This function takes the following parameters:

- Quota or Fixed Value Variable
- Roll Type
- Type of Operation—The options are Average, Sum, or Error, which indicates the type of mathematical operation to perform. You can specify to take the average, if there is more than one fixed value, sum the values, or produce an error if there is more than one fixed value.

Output: An amount, with a unit type of the fixed value.

For example, Other Position's Quota or Fixed Value = Quota or Fixed Value Variable (Fixed Value (Rolling Monthly Quota:month)), Roll Type (Rollup), Operation is one of Average, Sum, or Error (Error if more than one))

19.1.15 Participant.Version() and Position.Version() Functions

Description: Use the Participant.Version() or Position.Version () data field functions to return an attribute on a specific version of a participant or position.

Input: A date, which determines the version of the participant or position to be used. This date can only be a literal, such as 01/01/08, or a date data field attribute, such as Participant.Hired or Participant.Generic Date 1.

Output: The attribute specified for the participant or position. For example, if you specify Manager.Name, using Position.Version(Participant.Hired). Manager.Name, the manager's name, a string, is returned. The type of output depends on the attribute specified and the return type of the formula or rule.

For example, you could use the Position.Version() function to retrieve the version of the position that is in effect on the transaction's accounting date, and then use that position version's target compensation in a formula for calculation. You might do this if the position's target compensation changed during the quarter.

19.1.16 Round

Description: Use this function to round a number to a specified number of digits using bankers rounding (a 5 rounds to the nearest even number of the digit one step to the left of the last digit). For example:

- 0.25 goes to 0.2
- 0.35 goes to 0.4

Input:

- Value—The number to be rounded.
- Number of digits—The number of digits entry specifies where the rounding occurs. Positive numbers and zero affect the right side of the decimal point, indicating how many decimal places to keep after the rounding, and negative numbers affect the left side of the decimal point, indicating which places to the left to round up or down.

Output: A rounded number.

Formula: Round = (Value (Transaction.Unit Value)), (Number of digits (2))

For example, If the value being rounded is 135.79, the following table shows the different possible results depending on the precision level specified (number of digits to round to).

Rounding Examples

| Scale (Number of Digits) | Action | Result |
|--------------------------|----------------------------|--------|
| 1 | Round to the nearest tenth | 135.8 |
| 0 | Round to the nearest 1 | 136 |
| -1 | Round to the nearest 10 | 140 |
| -2 | Round to the nearest 100 | 100 |

Values displayed as percentages are stored as decimal values, so that 96.78% is stored as 0.9678. When rounding a percentage, select the number of digits relative to the decimal expression of the percentage. For example, to round 96.78% (.9678) to 97% (.97), enter 2 for number of digits.

19.1.17 Set Unit Type

Description: Use the Set Unit Type function to assign a unit type to a value. For example, if you want to assign a currency to a credit value, use this function.

Input:

- Value—A numeric value.
- Unit Type—A unit type for the specified value.

Output: A value with a unit type.

For example, Set Unit Type(\$100, euro)

19.1.18 Transaction.Payee Pre-Assignment () Functions

Description: You can use the following data field functions to retrieve pre-assigned transactions based on the position's, title's, or participant's generic attributes information that displays on the pre-assigned transaction.

- Transaction.Transaction Payee Pre-Assignment For Participant ()
- Transaction.Transaction Payee Pre-Assignment For Position ()
- Transaction.Transaction Payee Pre-Assignment For Title ()

Input: None

Return Type: Numeric, Integer, Boolean, or String. The return type depends on the type of generic attribute being retrieved.

For example, Transactions could be assigned such that the first set of payees specified on a transaction receive 65% of the credit for the transaction, and anyone specified in the second set of payees on the transaction receive 35% of the credit. Then, in your credit rules, you could build a condition that uses one of the transaction pre-assignment index functions to return a generic attribute such as Transaction.Transaction Payee Pre-Assignment For Participant().Generic Attribute 1.

i Note

Be careful to avoid ambiguous Transaction Pre-assignment Generic Attribute references. For example, if a given transaction has two pre-assignment records for a payee that exists in two positions and the same Generic Attribute on the two pre-assignment records is given distinct values, referencing Transaction.Transaction Payee Pre-Assignment for Participant is an ambiguous reference, because the same payee (Participant) exists on both of the transactions pre-assignment records. The correct reference, in this case, should be Transaction.Transaction Payee Pre-Assignment for Position; because the Position reference yields a distinct answer. The GA referenced for this transaction is distinct only in relation to position, not to payee. Similarly, if the same title or position is referenced (but the payee varies) on multiple assignments for the same transaction, the appropriate function to use would be payee-based reference.

19.1.19 Transaction.Classifier()

Description: Use this data field function to retrieve data on the classifier against which a transaction was classified.

Input: Specify a category hierarchy in which to find the classifier.

Return Type: Depends on the return type of the selected classifier field.

For example, As part of a condition to a credit rule, you could use a formula that compares the classifier's cost to a specified amount.

i Note

If a single transaction classifies more than once under a given category hierarchy (classifies against 2 or more distinct classifiers under the same tree); the use of the Transaction.Classifier() function to return attributes from a classifier can return ambiguous results. The calculation will use the first classification record to determine which classifier it returns attributes for. That may or may not be the desired classifier reference. (Note that this can only happen when this rule is violated when building classification rules - "If you have several category hierarchies with the same classifier type, the same transaction can be classified under each category hierarchy, but not twice under the same one").

19.1.20 Trim String

Description: Use the Trim String function to trim extra white spaces from a text field's value. For example, you could use the Trim String function to retrieve just the text string from a transaction field. Imported transactions often have extra white spaces, which can sometimes cause problems in calculation processing.

Input: A string.

Output: A string, leading or trailing white spaces removed.

19.1.21 Trunc

Description: Use this function to truncate a number to a specified number of digits.

Input: A number to be truncated, and the number of digits (scale) where truncation occurs.

- Positive numbers and zero affect the right side of the decimal point, indicating how many decimal places to keep.
- Negative numbers affect the left side of the decimal point, indicating which places to the left to truncate (that is, change to zero).
- Values displayed as percentages are stored as decimal values, so that 96.78% is 0.9678. When truncating a percentage, select the number of digits relative to the decimal expression of the percentage. For example, to truncate 96.78% (.9678) to 96.7% (.967), enter 3 for number of digits.

For example, the number 135.7654, would be truncated as shown in the following table.

Truncation Examples

| Scale | Action | Result |
|-------|--------------------------------|------------------------|
| 1 | Truncate at the tenth position | 135.7654 becomes 135.7 |
| 0 | Truncate at the ones position | 135.7654 becomes 135 |
| -1 | Truncate at the 10s position | 135.7654 becomes 130 |
| -2 | Truncate at the 100s position | 135.7654 becomes 100 |

Output: A truncated number. (Return type currency, integer, percent, or quantity).

For example, Truncate the monthly exchange rate to two places to the right of the decimal point (scale of 2). The monthly exchange rates are imported as fixed values with a scale of 4, and company policy is to truncate, rather than round, all exchange rates.

Formula: $\text{Trunc} = \text{Value}(\text{Monthly Quota:month}), \text{Scale}(2)$

19.2 Sum Functions Overview

This section includes information about the functions that can do sum operations on various results data.

- Sum Prior Quotas or Fixed Values
- Sum Prior Measurements
- Sum Prior Incentives
- Sum Quotas or Fixed Values to Date
- Sum Measurements to Date
- Sum Incentives to Date
- Sum Deposits to Date and Sum Deposits to Date with Status

Related Articles

- [Sum Prior Quotas or Fixed Values \[page 266\]](#)
- [Sum Prior Measurements \[page 266\]](#)
- [Sum Measurements to Date by Participant \[page 267\]](#)
- [Sum Prior Measurements by Participant \[page 268\]](#)
- [Sum Prior Incentives \[page 268\]](#)
- [Sum Incentives to Date by Participant \[page 269\]](#)
- [Sum Quotas or Fixed Values to Date \[page 271\]](#)
- [Sum Measurements to Date \[page 271\]](#)
- [Sum Incentives to Date ↗ Sum Deposits to Date and Sum Deposits to Date with Status \[page 273\]](#)

19.2.1 Sum Prior Quotas or Fixed Values

Description: Use this function to obtain a quota or fixed value that crosses the boundaries of the usual calendar periods. For example, you can sum the values of a rolling quarter period of the last three months, even when those months do not constitute a calendar quarter.

Inputs to Sum Prior Quotas or Fixed Values Function

| Input | Description |
|--|--|
| Quota or Fixed Value | Specify a quota, fixed value, or fixed value variable. |
| Number of periodic values to include | Indicates how many prior periods (not including the current period) to include in the sum, enter the number. |
| Use true to include the current period | Indicates whether or not to include the current period in the sum, select True or False. |

Output: The sum of prior values, as appropriate.

Example: A participant gets compensated based on the last three months' performance compared to the quarterly quota.

Formula: Sum Prior Quotas or Fixed Values = (Quota or Fixed Value (Last Value (MonthlyQuota:month)), (Num Value (2)), (Include Last? (true)))

19.2.2 Sum Prior Measurements

Description: Use this function to obtain a measurement value that crosses the boundaries of the usual calendar periods. For example, you can sum the values of a rolling quarter period of the last three months, even when those months do not constitute a calendar quarter.

Inputs to Sum Prior Measurements Function

| Input | Description |
|--|---|
| Measurement | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Measurement Input item to open the Measurement Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of a measurement in a sum function. |
| Number of Measurements to include | Indicates how many prior periods (not including the current period) to include in the sum; enter the number. |
| Include Last Measurement in Calculation? | Indicates whether or not to include the current period in the sum; select True or False. |

Output: The sum of prior measurements as appropriate.

Example: An incentive rule pays out if the last six months' performance is above a specified number. The formula calculates the last six months' worth of the Sales Revenue PM (primary measurement).

Formula: Sum Prior Measurements (Measurement (Sales Revenue PM: month), Num Measurements (6), Include Last? (false))

19.2.3 Sum Measurements to Date by Participant

Description: Use this function to obtain measurement values to determine performance progress so far during a period. The value shows accumulation toward a goal that you can compare (usually through a condition) to something else to determine attainment. The details indicate which value and how much of it to sum.

i Note

Because measurements are always calculated at the leaf-period (for example, monthly), you can point to any period-based version of a measurement.

Input for Sum Measurements to Date by Participant function

| Input | Description |
|--|---|
| Measurement | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Measurement Input item to open the Measurement Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of a measurement in a sum function. |
| Period Type | The period in which to sum the measurement (for example, "r;year" to date). |
| Include Last Measurement in Calculation? | Indicate whether or not to include the current subset of that period in the sum; select True or False. For example, you could use this function to total a monthly value, quarter to date, with (True) or without (False) the current month. |

Output: A calculated measurement value.

Example: If a participant has achieved more than 75% of the annual quota, then award the participant a bonus. The formula calculates the attainment year to date (so far).

Formula: Sum Measurements to Date by Participant = (Measurement (Manager Revenue PM: month), Period Type (year), (Include Last? (true)))

i Note

To see the difference between Sum Measurements to Date by Participant function and the existing Sum Measurements to Date function, assign the same participant (payee) to different Position for a different period and then use the Sum Measurements to Date function to sum over the periods. The new Sum Measurements to Date by Participant function gives the sum for the same participant whereas the regular Sum Measurements to Date function gives the sum for the same position.

19.2.4 Sum Prior Measurements by Participant

Description: Use this function to obtain a measurement value that crosses the boundaries of the usual calendar periods. For example, you can sum the values of a rolling quarter period of the last three months, even when those months do not constitute a calendar quarter.

Inputs to Sum Prior Measurements by Participant Function

| Input | Description |
|--|---|
| Measurement | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Measurement Input item to open the Measurement Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of a measurement in a sum function. |
| Number of Measurements to include | Indicates how many prior periods (not including the current period) to include in the sum; enter the number. |
| Include Last Measurement in Calculation? | Indicates whether or not to include the current period in the sum; select True or False. |

Output: The sum of prior measurements by the participant as appropriate.

Example: An incentive rule pays out if the last six months' performance is above a specified number. The formula calculates the last six months' worth of the Sales Revenue PM (primary measurement).

Formula: Sum Prior Measurements by Participant (Measurement (Sales Revenue PM: month), Num Measurements (6), Include Last? (false))

i Note

To see the difference between Sum Prior Measurements by Participant function and the existing Sum Prior Measurements function, assign the same participant (payee) to different Position for a different period and then use the Sum Prior Measurements function to sum over the periods. The new Sum Prior Measurements by Participant function gives the sum for the same participant whereas the regular Sum Prior Measurements function gives the sum for the same position.

19.2.5 Sum Prior Incentives

Description: Use this function to obtain an incentive value that crosses the boundaries of the usual calendar periods. For example, you can sum the incentive values of a rolling quarter period of the last three months, even when those months do not constitute a calendar quarter.

Inputs to Sum Prior Incentives Function

| Input | Description |
|--|--|
| Incentive | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Incentive Input item to open the Incentive Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of an incentive in a sum function. |
| Number of Incentives to Include | Indicates how many prior periods (not including the current period) to include in the sum, enter the number. |
| Include Last Incentive in Calculation? | Indicates whether or not to include the current period in the sum, select True or False. |

Output: The sum of prior incentives, as appropriate.

Formula: Sum Prior Incentives ((Incentive (Director Revenue Commission: month)), (Num Incentives (6)), (Include Last? (false)))

19.2.6 Sum Incentives to Date by Participant

Description: Use this function to obtain incentive values to use to determine performance progress so far during a period. The details indicate which value and how much of it to sum.

i Note

Last Incentive cannot refer to an incentive period lower than the period level of the incentive. For example, if the incentive is a quarterly bonus, you cannot refer to the monthly value of the incentive. You can refer to the quarterly or yearly values.

Input for Sum Incentives to Date by Participant function

| Input | Description |
|--|--|
| Incentive | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Incentive Input item to open the Incentive Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of an incentive in a sum function. |
| Period Type | The period in which to sum the incentive (for example, "r;year" to date). |
| Include Last Incentive in Calculation? | Indicate whether or not to include the current subset of that period in the sum select True or False. For example, you could use this function to total a monthly value, quarter to date, with (True) or without (False) the current month. |

Output: A calculated incentive value.

Example: Calculate the incentives year to date less the amount paid so far. The formula calculates the incentives year to date.

Formula: Sum Incentives To Date by Participant = (Incentive (Director Revenue Commission:month), Period Type (year), Include Last? (true))

i Note

To see the difference between Sum Incentives to Date by Participant function and the existing Sum Incentives to Date function, assign the same participant (payee) to different Position for a different period and then use the Sum Incentives to Date function to sum over the periods. The new Sum Incentives to Date by Participant function gives the sum for the same participant whereas the regular Sum Incentives to Date function gives the sum for the same position.

19.2.7 Sum Prior Incentives by Participant

Description: Use this function to obtain an incentive value that crosses the boundaries of the usual calendar periods. For example, you can sum the incentive values of a rolling quarter period of the last three months, even when those months do not constitute a calendar quarter.

Inputs to Sum Prior Incentives by Participant Function

| Input | Description |
|--|--|
| Incentive | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Incentive Input item to open the Incentive Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of an incentive in a sum function. |
| Number of Incentives to Include | Indicates how many prior periods (not including the current period) to include in the sum, enter the number. |
| Include Last Incentive in Calculation? | Indicates whether or not to include the current period in the sum, select True or False. |

Output: The sum of prior incentives by a participant, as appropriate.

Formula: Sum Prior Incentives by Participant ((Incentive (Director Revenue Commission: month)), (Num Incentives (6)), (Include Last? (false)))

i Note

To see the difference between Sum Prior Incentives by Participant function and the existing Sum Prior Incentives function, assign the same participant (payee) to different Position for a different period and then use the Sum Prior Incentives function to sum over the periods. The new Sum Prior Incentives by Participant function gives the sum for the same participant whereas the regular Sum Prior Incentives function gives the sum for the same position.

19.2.8 Sum Quotas or Fixed Values to Date

Description: Use this function to obtain quotas or fixed values to determine performance progress so far during a period. The details indicate which value and how much of it to sum.

i Note

The Period Type must refer to the same or a larger period at which the quota or fixed value is stored. For example, if "Sales Quota 2008?" is stored as quarterly values only, you should not refer to the monthly values of that fixed value, but you can refer to a quarter or year period.

Input for Sum Values to Date function

| Input | Description |
|--|--|
| Quota or Fixed Value | Specify a quota, a fixed value, or fixed value variable. |
| Period Type | The period in which to sum the value (for example, "year? to date"). This should match or contain the period type of the quota, fixed value or fixed value variable. |
| Use true to include the current period | Indicate whether or not to include the current subset of that period in the sum; select True or False. For example, you could use this function to total a quarterly value, quarter to date, with (True) or without (False) the current month. |

Output: A calculated value.

Formula: Sum Quotas or Fixed Values to Date = (Quota or Fixed Value (AP Simple Commission Incentive: month)), Period Type (month), Include Last? (true))

19.2.9 Sum Measurements to Date

Description: Use this function to obtain measurement values to determine performance progress so far during a period. The value shows accumulation toward a goal that you can compare (usually through a condition) to something else to determine attainment. The details indicate which value and how much of it to sum.

i Note

Because measurements are always calculated at the leaf-period (for example, monthly), you can point to any period-based version of a measurement.

Input for Sum Measurements to Date function

| Input | Description |
|--|---|
| Measurement | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Measurement Input item to open the Measurement Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of a measurement in a sum function. |
| Period Type | The period in which to sum the measurement (for example, "year? to date). |
| Include Last Measurement in Calculation? | Indicate whether or not to include the current subset of that period in the sum; select True or False. For example, you could use this function to total a monthly value, quarter to date, with (True) or without (False) the current month. |

Output: A calculated measurement value.

Example: If a participant has achieved more than 75% of the annual quota, then award the participant a bonus. The formula calculates the attainment year to date (so far).

Formula: Sum Measurements to Date = (Measurement (Manager Revenue PM: month), Period Type (year), (Include Last? (true))

19.2.10 Sum Incentives to Date

Description: Use this function to obtain incentive values to use to determine performance progress so far during a period. The details indicate which value and how much of it to sum.

i Note

Last Incentive cannot refer to an incentive period lower than the period level of the incentive. For example, if the incentive is a quarterly bonus, you cannot refer to the monthly value of the incentive. You can refer to the quarterly or yearly values.

Input for Sum Incentives to Date function

| Input | Description |
|--|--|
| Incentive | Select the first parameter, and in the Legal Moves area, under the References column, double-click the Incentive Input item to open the Incentive Input Reference dialog: Note: It is recommended that you not specify an offset for sum functions. Also, do not specify a synthetic version of an incentive in a sum function. |
| Period Type | The period in which to sum the incentive (for example, "year? to date). |
| Include Last Incentive in Calculation? | Indicate whether or not to include the current subset of that period in the sum select True or False. For example, you could use this function to total a monthly value, quarter to date, with (True) or without (False) the current month. |

Output: A calculated incentive value.

Example: Calculate the incentives year to date less the amount paid so far. The formula calculates the incentives year to date.

Formula: Sum Incentives To Date = (Incentive (Director Revenue Commission:month), Period Type (year), Include Last? (true))

19.2.11 Sum Deposits to Date and Sum Deposits to Date with Status

Description: Use these two functions (one with and one without Deposit Status) to total deposits with the same name for a given period. You can use this value in a condition statement so that incentive decisions can be based on it. The details indicate which value and how much of it to sum.

Input:

- Deposit Name—to indicate which deposits to sum, select String then enter the name of the deposit.

Note: Your entry must exactly match the case and spacing of the deposit name.

- Period Type—the period in which to sum the deposit (for example, “year? to date”).
- Deposit Status—(applies only to the Sum Deposits to Date with Status function) to indicate by status which deposits to the total, select the hold status: available, held, both.

Output: The sum of the calculated deposits

Example: Calculate the deposits year to date less the amount paid so far. The formula calculates the deposits year to date.

Formula: Sum Deposits to Date with Status = (Deposit Name (“Sr VP Quarterly Deposit?”), Period Type (year), Deposit Status (Available))

19.3 About Order-Level Functions Overview

Each function calculates data that represents summary information related to all the transactions on an order. These functions are referred to as order-level functions. The following table describes the order-level functions.

Order-Level Functions

| Function Name | Description |
|-------------------------------------|--|
| Order Max Credit - DO/RO | Maximum or minimum credit amount |
| Order Min Credit - DO/RO | (cannot be used in a transaction-based credit rule or formula) |
| Order Min Transaction - DO/RO/DC/RC | Maximum or Minimum value of transactions |
| Order Max Transaction - DO/RO/DC/RC | |

| Function Name | Description |
|---|-------------------------------|
| Order Sum Credits - DO/RO | Sum of transaction credits |
| Order Sum Transaction Units - DO/RO/DC/RC | Sum of units of transactions |
| Order Sum Transactions - DO/RO/DC/RC | Sum of values of transactions |
| Order Num Transactions - DO/RO/DC/RC | Number of transactions |

The following table contains the details that you input into the previous functions.

i Note

Only the credit value functions accept the details of credit type and credit held.

The order-level functions accept the details as shown in the following table.

Arguments for Order-Level Functions

| Argument | Possible Values |
|--|--|
| Event Type | (any of the defined event types) Any (accepts items regardless of event type) |
| territory, Category, Classifier | a specific classifier assignment a specific category or subcategory a specific territory Any (accepts items regardless of territory and so forth) |
| Current Position Only? | true: Select only transactions credited to current position assignment. |
| (Only Transactions credited to current Position) | false: Select transactions that are not credited to the current position assignment. Any: Select transactions regardless of who received credit. |
| Period Type | (any of the defined period types) Any (accepts items regardless of period type) |
| Line Number | Specify an integer (for example, type a number or point to a fixed value). Any (accepts items regardless of line number) |
| Credit Type | (any of the defined credit types) Any (accepts items regardless of credit type) |
| Credit Held? | true (the credit is currently held and not available) false (the credit is not currently held and is available) Any |

How Empty Orders are Processed

The following order-level functions return a null if no data is returned:

- Order Max Credit - DO/RO
- Order Min Credit - DO/RO
- Order Min Transaction - DO/RO/DC/RC
- Order Max Transaction - DO/RO/DC/RC

The following order-level functions return a zero value if no data is returned:

- Order Num Transactions - DO/RO/DC/RC
- Order Sum Credits - DO/RO
- Order Sum Transactions - DO/RO/DC/RC
- Order Sum Transaction Units - DO/RO/DC/RC

19.3.1 Credit.Is Order Credit() and Source Credit.Is Order Credit()

Description: Use these functions to determine whether a credit is based on an entire order (if it is not an order credit, it is transaction-based). This function can also display as a data field in the Legal Moves listing as Source Credit.Is Order Credit.

Input: None

Return Type: True or false (Boolean)

Example: Knowing if a Credit is an Order Level Credit is useful if you are creating a measurement that aggregates Order Level Credits (you'd use this function in the condition field of the Measurement rule).

19.3.2 Order Max/Min Credit - DO/RO

Description: Use these two functions to calculate the maximum or minimum transaction credit value that comes from an order. These two functions cannot be used in a transaction-based credit rule. The -DO or -RO extension to the function names distinguish between the function for use in direct order credit rules (DO) and rolled order credit rules (RO).

Input:

- Event Type
- Territory / Category / Classifier
- Current Position only? (Only Transactions credited to current Position)
- Period Type
- Line Number
- Credit Type
- Credit Held?

Output: A numeric value, with the same unit type as Min/Max credit value unit type in the order.

19.3.3 Order Max/Min Transaction - DO/RO/DC/RC

Description: These functions return the transaction value that is either the largest (max) or smallest (min) on an order. The -DO, -RO, -DC, and -RC extension to the function names distinguish between the function for use in direct order credit rules (DO), rolled order credit rules (RO), direct transaction credit rules (DC), and rolled transaction credit rules (RC).

Input:

- Event Type
- Territory / Category / Classifier Assignment
- Current Position Only? (Only Transactions credited to current Position)
- Period Type
- Line Number

Output: A numeric value, with the same unit type as Max/Min Txn value on the order.

19.3.4 Order Sum Credits - DO/RO

Description: This function returns the sum of the transaction credits related to a specific order. This function cannot be used in a transaction-based credit rule. The -DO or -RO extension to the function names distinguish between the function for use in direct order credit rules (DO) and rolled order credit rules (RO).

Input:

- Event Type
- Territory / Category / Classifier
- Current Position Only? (Only Transactions credited to current Position)
- Period Type
- Line Number
- Credit Type
- Credit Held?

Output: A numeric value, with the same unit type as the sum of credit values on the order.

19.3.5 Order Sum Transaction Units - DO/RO/DC/RC

Description: This function calculates the total number of transaction units on an order. The -DO, -RO, -DC, and -RC extension to the function names distinguish between the function for use in direct order credit rules (DO), rolled order credit rules (RO), direct transaction credit rules (DC), and rolled transaction credit rules (RC).

Input:

- Event Type
- Territory / Category / Classifier
- Current Position Only? (Only Transactions credited to current Position)
- Period Type

- Line Number

Output: A numeric value of quantity unit type.

19.3.6 Order Sum Transactions - DO/RO/DC/RC

Description: This function calculates the sum of the transaction on an order. The -DO, -RO, -DC, and -RC extension to the function names distinguish between the function for use in direct order credit rules (DO), rolled order credit rules (RO), direct transaction credit rules (DC), and rolled transaction credit rules (RC).

Input:

- Event Type
- Territory / Category / Classifier Assignment
- Current Position? (Only Transactions credited to current Position for order credit rules only)
- Period Type
- Line Number

Output: A numeric value of quantity unit type.

19.3.7 Order Num Transactions - DO/RO/DC/RC

Description: This function calculates the number of transactions on an order. The -DO, -RO, -DC, and -RC extension to the function names distinguish between the function for use in direct order credit rules (DO), rolled order credit rules (RO), direct transaction credit rules (DC), and rolled transaction credit rules (RC).

Input:

- Event Type:
- Territory / Category / Classifier
- Current Position? (Only Transactions credited to current Position for order credit rules only)
- Period Type
- Line Number

Output: A numeric value of quantity unit type.

19.3.8 Transaction Line and Order Total() Functions

You can use the Transaction.Line Total() and the Order.Total() data field functions to retrieve the total value of a transaction line or of an entire order. Remember that transactions are actually sublines on an order. These data field functions take no input.

19.4 Text Search Functions Overview

All of the following are text search functions:

- String Contains
- String Ends With
- String Starts With
- Substring Between
- Substring From
- Substring Using Pattern

You can use these functions to look for a pattern or string in a field, such as a Generic Attribute field. You use two types of functions: one type returns a true or false, and the other type returns the string itself, or a portion thereof. You access the pattern search functions from the Legal Moves window. Searches can be case sensitive, or not. You can search for plain text, or you can include advanced wildcard operators in your search criteria. These advanced wildcard operators are commonly referred to as regular expressions. A regular expression is an advanced search notation commonly used with databases and search engines.

There are many different variations for regular expression syntax. Commissions uses the PERL set, which is the fullest set. Because of a third-party product interdependency, some characters should not be used in input strings as they cause problems during calculation processing.

19.4.1 String Contains

Description: Looks for a particular string that contains the given pattern text.

Input: This function takes the following input parameters:

- String
- Pattern Text
- Case Sensitive?

Output: True or False (Boolean return type)

Example: For example, when a function searches for the pattern "Golf" (Pattern Text) in Transaction.ProductDesc(String), the function returns "true" if the transaction's Product Description includes "Golf." The function returns "false" if the pattern text is not found.

Formula: String Contains (Transaction.ProductDesc,"Golf", false)

19.4.2 String Ends With

Description: Looks for a particular string that ends with the given pattern text.

Input: This function takes the following input parameters:

- String

- Pattern Text
- Case Sensitive?

Output: True or False (Boolean return type)

Example: For example, when a function searches for the pattern “Golf” (Pattern Text) in Credit.Transaction.ProductDesc (String), the function returns “true” if the transaction’s Product ID ends with the text “Golf”. The function returns “false” if the pattern text is not found.

Formula: String Ends With (Credit.Transaction.ProductDesc, “Golf”, true)

19.4.3 String Starts With

Description: Looks for a particular string that starts with the given pattern text.

Input: This function takes the following input parameters:

- String
- Pattern Text
- Case Sensitive?

Output: True or False (Boolean return type)

Example: For example, when a function searches for the pattern “951” (pattern text) in the Transaction.Shipping.PostalCode (String), the function returns “true” if the transaction’s shipping address postal code begins with “951”. The function returns “false” if the pattern text is not found.

Formula: String Starts With (Transaction.Shipping.PostalCode, “951”, false)

19.4.4 Substring Between

Description: Looks for and returns the largest portion of a particular string that starts at a given starting character position and ends at a given ending character position.

If startIndex > string length or if endIndex < string length, an empty string is returned.

Input: This function takes the following input parameters:

- Source String (the string from which the substring is obtained)
- Start Index of the substring to be extracted
- End Index of the substring to be extracted

Output: A string (String return type)

Example: For example, when a function searches for the text that starts with the sixth field character (startIndex) and ends at the seventh field character (endIndex) in Transaction.Shipping.PostalCode (string), the function returns what it finds between the two character positions.

Formula: Substring Between (Transaction.Shipping.PostalCode, 6, 7)

19.4.5 Substring From

Description: Looks for and returns the portion of a string beginning with the character at the Start Index position through the end of the string.

If the number given for the Start Index is greater than the length of the string, an empty string is returned.

Input: This function takes the following input parameters:

- Source String (the string from which the substring is obtained)
- Start Index of the substring to be extracted

Output: A string (String return type)

Example: SubString From (Transaction.ProductDesc, 6) could search the following Product Description string fields:

Golf Putter Golf Driver Golf Set - Women's Golf Beginner Set

The function would return the following strings:

Putter Driver Set - Women's Beginner Set

Formula: SubString From (Transaction.ProductDesc, 6)

19.4.6 Substring Using Pattern

Description: Looks for and returns the largest portion of a particular string that matches the given pattern text.

Input: This function takes the following input parameters:

- String
- Pattern Text
- Case Sensitive?

Output: A string (String return type)

Example: For example, when a function searches for the pattern "UB4" (pattern text) in Transaction.Generic Attribute 1 (string), the function returns the found pattern when the transaction contains "UB4" in that field.

Formula: Substring Using Pattern (Transaction.Generic Attribute 1, "UB4", false)

19.5 Date Functions Overview

This section contains the following topics:

- Overview of the Date Functions
- Add Time to Date
- Calendar Start Date and Calendar End Date
- Convert Date to String

- Convert Number to Date
- Convert String to Date
- Fiscal Date
- Fiscal Period Start Date and Fiscal Period End Date
- Measure Time Between Dates
- Measure Time Overlap
- Measure Time Overlap Percentage
- Measure Periods Between Dates
- Measure Period Overlap
- Measure Period Overlap Percentage
- Calculation Run Date

Related Articles

- [About Date Functions \[page 281\]](#)
- [Add Time to Date \[page 283\]](#)
- [Calendar Start Date and Calendar End Date \[page 283\]](#)
- [Convert Date to String \[page 284\]](#)
- [Convert Number to Date \[page 284\]](#)
- [Convert String to Date \[page 284\]](#)
- [Fiscal Date \[page 285\]](#)
- [Fiscal Period Start Date and Fiscal Period End Date \[page 285\]](#)
- [Measure Time Between Dates \[page 286\]](#)
- [Measure Time Overlap \[page 286\]](#)
- [Measure Period Overlap Percentage \[page 289\]](#)
- [Measure Periods Between Dates \[page 287\]](#)
- [Measure Period Overlap \[page 288\]](#)
- [Measure Period Overlap Percentage \[page 289\]](#)

19.5.1 About Date Functions

Commissions can calculate or act based on date information using date functions and either the standard calendar or your Commissions fiscal calendar. You can choose to specify a date in a date function in any of three ways:

- Enter a specific date (for instance, "01.03.2008")
- Pick a date from the using the Calendar field button (an easy way to enter a specific date)
- Specify a relative date (for instance, "3 months offset from fiscal quarter")

You can use date functions in formulas and in rule conditions. The dates specified in a date function must be within the default effective dates as determined by the default calendar.

Null Date Processing

When Commissions encounters a null date that is used in a date calculation function, it inserts a specific date of its own in place of the null date. If a rule processes a null date (meaning that no date is specified), Commissions assumes the following:

- Start dates that are null are set to 12/31/1969 4:00 pm
- End dates that are null are set to 12/31/2200 4:00 pm

Commissions generates an error message in the log file when it encounters null dates.

As a result, during calculation processing, Commissions might generate a false credit and an error message in the log file. A 'false' credit is one that you did not intend to create. Commissions might also not create the credit that you intended to create.

For example, the following situation causes a false credit to be generated:

- Use a function that uses a date as input (such as Add Time to Date) in a compensation rule formula.
- Use a NULL date (such as Position.GenericDate1) as input to the function.
- Create a condition, such as:

If the result of the formula > April 30, 2008, create a credit

- Run the calculation. A false credit is generated.

When the date that is null is a start date, Commissions uses December 31st, 1969 4:00 pm. For null end dates, it uses December 31st, 18969, 14:00 pm.

i Note

When specifying a fiscal date, the date must occur within the bounds of the periods defined in your Commissions. Otherwise, Commissions returns an error.

Caution: If one of the date comparison or date overlap functions is used, then the aforementioned null date processing does not apply. In the context of these functions, these date assumptions are considered invalid for the purposes of the function. For more information, see the details for the following functions:

- Measure Time Between Dates
- Measure Time Overlap
- Measure Time Overlap Percentage
- Measure Periods Between Dates
- Measure Period Overlap
- Measure Period Overlap Percentage

Example Dates

For each of the date calculation functions, you can read the example to see how the function works. For the examples that use fiscal period information, assume the following fiscal period structure:

Date Calculation Example Fiscal Periods

| Period | Period Start Date | Period End Date | Number of Days in Period |
|-----------------------------------|-------------------|------------------|--------------------------|
| Period1 | January 10, 2008 | February 8, 2008 | 30 |
| Period2 | February 9, 2008 | March 9, 2008 | 30 |
| Period3 | March 10, 2008 | April 8, 2008 | 30 |
| First Quarter of Fiscal Year 2008 | January 10, 2008 | April 8, 2008 | 90 |

19.5.2 Add Time to Date

Description: Adds calendar years, months, days, hours, or minutes to a given date.

Input:

- Date
- Value—An offset amount
- Unit of Time (Days, Hours, Minutes, Months, Quarters, Seconds, Weeks, Years)

i Note

This function returns the End Of Time constant (1/1/2200) if the input date is null.

Output: A date (Date return type)

Example: Give a sales representative extra credit for a transaction if the transaction's compensation date falls within three months of the position assignment's start date.

Formula: Add Time to Date [Date (Position Processing Start Date (true), Offset(3), Unit of Time (Months))]

Use the formula in the condition: Valid Transaction.Compensation Date < "qualification date.?"

19.5.3 Calendar Start Date and Calendar End Date

Description: Given a specified date, these two functions (Calendar Start Date, Calendar End Date) find the start or end date of a specified span of calendar time. For example, the first day of a calendar month, or last day of a calendar year.

Input:

- Date
- Period type
- Period Offset

i Note

These functions return the End Of Time constant (1/1/2200) if the input date is null and the Beginning of Time constant (1/1/1900) if the period offset is null.

Output: The start or end date (depending on the function chosen) of the resultant span of calendar time (Date return type).

Example: Process the rule if the first day of the calendar month (in which the participant started in the position) is in the current period.

Formula: Calendar Start Date [Date (Position Processing Start Date), Period Type (Months), Period Offset (0)]

19.5.4 Convert Date to String

Description: Converts a specified date from a field to a text string.

Input: For the input, specify a date field, such as Credit.Compensation Date or a function that returns a date. Also, you can enter a literal in the format mm/dd/yyyy.

Output: A string (String return type) in the format mm/dd/yy HH:MM AM/PM.

19.5.5 Convert Number to Date

Description: Converts a number to date format.

Input: An integer number in the format of YYYYMMDDHHMMSS or YYYYMMDD (in the latter case, assumes the next six digits as zero).

i Note

This function returns the End Of Time constant (1/1/2200) if the input number is null.

Output: A date (Date return type)

Example: Input of 20080209152614; the output is 2/9/08 3:26 PM.

19.5.6 Convert String to Date

Description: Converts a text string to date format. The text string should be in the format appropriate for the current locale (different date and time formats are used in different locales).

For example, if an English (United States) locale is used, the string must be in either of the following formats:

Date and time: "mm/dd/yy hh:mm am"

Date only: "mm/dd/yy"

i Note

If the date stored as a string is not exactly in the format of the current locale, Commissions generates an error when you run the calculation.

Input: String

i Note

This function returns the End Of Time constant (1/1/2200) if the input date is null.

Output: A date in the format of the current locale (Date return type)

Example: With the current locale set to English (United States), Commissions converts a text string input of 02/09/07 3:26 pm to an output date of Feb 09 2007 3:26 pm.

19.5.7 Fiscal Date

Description: Returns the start or end date of a fiscal period.

Input: This function takes the following parameters:

- Period Type
- Period Offset
- Start Date or End Date

Output: A date (Date return type)

19.5.8 Fiscal Period Start Date and Fiscal Period End Date

Description: Given a specified date, these two functions find the start or end date of the fiscal period in which the date exists.

Input:

- Date
- Period Type
- Period Offset

i Note

When you specify an offset, be sure that the fiscal calendar has defined the period that you offset to; otherwise Commissions generates an error.

i Note

These functions return the End of Time constant (1/1/2200) if the input date is null.

Output: The start or end date (depending on the function chosen) of the resultant fiscal period (Date return type).

Example: Process the rule for the next four periods, starting with the position assignment's start date for credit.

Formula: "Date to begin policy?? = Fiscal Period Start Date [Fiscal Period Start Date (Position Credit Start Date) Period Type (month) offset (3)]

"Date to end policy?? = Fiscal Period End Date [Date (Position Credit Start Date) Period Type (month) Offset (3)]

19.5.9 Measure Time Between Dates

Description: Measures the amount of time between two specified dates.

Input:

- Start Date
- End Date
- Unit of Time
- Absolute? Use the absolute value of the result (t/f). Absolute value ignores whether or not a value is negative. If false and end date is before start date, Commissions returns a negative value.

i Note

This function returns a zero if either the Start Date or End Date is null.

Output: A quantity of time (Return type = quantity), measured in the specified units. This function rounds up when your date calculation spans more than one full unit of time.

Example: Pay one rate or amount if a delivery was made within ten minutes of a target time, another if it was within 30 minutes, and another if more than 30 minutes (within = before or after target).

Formula: Measure Time Between Two Dates [Start Date (Transaction.Comp Date), End Date (Transaction.AcctDate), Unit of Time(Minutes), Absolute? (true)]

19.5.10 Measure Time Overlap

Description: Measures the amount of time that two sets of dates overlap. If input parameters contain null dates, this function works as follows:

- If both the Second Start Date and (First) Start date are null, or the Second End Date and (First) End date are null, the function returns zero.
- If either the Second Start Date or (First) Start Date are null, the BOT constant (1/1/1900) is substituted for the null date.
- If either the Second End Date or the (First) End Date are null, the EOT constant (1/1/2200) is substituted for the null date.

Input:

- Start Date and End Date—Dates for time span #1. The (First) Start Date must be earlier than Second Start Date, and (First) End Date must be earlier than Second End Date.
- Second Start Date and Second End Date—Dates for time span #2
- Unit of time

Output: A quantity of time, measured in the specified units (Quantity return type)

Example: Calculate the number of days a participant has been employed so far (as of the end of the month) for the current year.

Formula: Measure Time Overlap ((First Start Date (Position Processing Start Date (true)), (First End Date (Position Processing End Date (true))), ((Second Start Date (Fiscal Date (year, 0, Start Date)), Second End Date (Fiscal Date (Month, 0, End Date,)), Unit of time (Days)]

19.5.11 Measure Time Overlap Percentage

Description: Measures the percentage of time that one set of dates overlaps another set of dates.

If input parameters contain null dates, this function works as follows:

- If either the (First) Start Date or (First) End Date, the function returns zero.
- If the Second Start Date is null, the BOT constant (1/1/1900) is substituted for the null date.
- If the Second End Date is null, the EOT constant (1/1/2200) is substituted for the null date.
- If both the Second Start Date and Second End Date are null, the BOT constant (1/1/1900) is substituted for the null dates.

Input:

- (First) Start Date and (First) End Date—Dates for time span #1. The (First) Start Date must be earlier than Second Start Date, and (First) End Date must be earlier than Second End Date.
- Second Start Date and Second End Date—Dates for time span #2
- Period Type
- Include Partial Periods?

Output: A percentage amount, measured in the specified units. (Percentage return type)

Example: Prorate a value based on the percentage of time worked during the current quarter (period), measured in hours.

Formula: Measure Time Overlap Percentage [Start Date ((Position Processing Start Date (true)), End Date (Position Processing End Date), Second start date (Fiscal Date (quarter, 0, Start Date)), Second end date (Fiscal Date(quarter, 0, End Date)), Unit of time (month), Include partial periods (true)]

19.5.12 Measure Periods Between Dates

Description: Measures the number of fiscal periods that two dates span. This counts the number of periods away the dates are from each other, not how many whole periods.

Two dates in the same period are a single, partial period (if include partial periods is true). If the dates are the same, then the number of periods spanned is zero. The following figure shows an example of how this function calculates the number of periods between two dates.

Input:

- Start Date
- End Date
- Period Type
- Include Partial Periods?
- Absolute?—Indicates whether or not to use the absolute value

i Note

This function does not work if any of the supplied dates are null. If any of the supplied dates to this function are null, Commissions generates an error message and returns a result of zero.

i Note

This function returns a zero if either the Start Date or End Date is null.

Output: The number of periods measured in the specified period type (Quantity return type)

Example: Calculate the number of quarters in the current year.

Formula: Measure Periods Between Dates [Start Date (Fiscal Date (year, 0, Start Date)), End Date (Fiscal Date (year, 0, End Date)) Period Type (quarter), Include Partial Periods? (false), Absolute? (true)]

19.5.13 Measure Period Overlap

Description: Measures the number of fiscal periods that one set of dates overlaps another set of dates.

It is common and acceptable for a position assignment's end date to be null (not specified), as long as the position assignment is active for all dates after the start date. If input parameters contain null dates, this function works as follows:

- If both the Second Start Date and (First) Start date are null, or the Second End Date and (First) End date are null, the function returns zero.
- If either the Second Start Date or (First) Start Date are null, the BOT constant (1/1/1900) is substituted for the null date.
- If either the Second End Date or the (First) End Date are null, the EOT constant (1/1/2200) is substituted for the null date.

Input:

- Start Date and End Date—Dates for time span #1. The (First) Start Date must be earlier than Second Start Date, and (First) End Date must be earlier than Second End Date.
- Second Start Date and Second End Date—Dates for time span #2
- Period Type
- Include Partial Periods?

Output: A quantity, measured in the specified period type (Integer return type)

i Note

This function does not work if any of the supplied dates are null. If any of the supplied dates to this function are null, Commissions generates an error message and returns a result of zero.

Example: Calculate the number of entire fiscal periods that the participant has been assigned to a position (since the beginning of the fiscal year through the end of the current period).

Formula: Measure Period Overlap [Start date (Position Processing Start Date), End Date (Position Processing End Date), Second Start Date (FiscalDate (year, 0, Start Date)), Second End Date (Fiscal Date (month, 0, End Date)), Period Type (month), Include Partial Periods? (false)]

19.5.14 Measure Period Overlap Percentage

Description: Measures the percentage of the specified fiscal period that a given set of dates overlaps another set of dates. It is common and acceptable for a position assignment's end date to be null (not specified), as long as the position assignment is active for all dates after the start date. If input parameters contain null dates, this function works as follows:

- If either the (First) Start Date or (First) End Date, the function returns zero.
- If the Second Start Date is null, the BOT constant (1/1/1900) is substituted for the null date.
- If the Second End Date is null, the EOT constant (1/1/2200) is substituted for the null date.
- If both the Second Start Date and Second End Date are null, the BOT constant (1/1/1900) is substituted for the null dates.

Input:

- Start Date and End Date—A start and end date for time span #1. The (First) Start Date must be earlier than Second Start Date, and (First) End Date must be earlier than Second End Date.
- Second Start Date and Second End Date—A start and end date for time span #2
- Period type
- Whether or not to include partial periods

i Note

This function does not work if any of the supplied dates are null. If any of the supplied dates to this function are null, Commissions generates an error message and returns a result of zero.

Output: A percentage, measured in the specified period type.

Example: Prorate something based on the percentage of full months (periods) worked during the current quarter (as of the current month), measured in days.

Formula: "Prorate percentage?? = Measure Period Overlap Percentage [((Position Processing Start Date (true)), (Positions Processing End Date (true)), (Fiscal Date (quarter, 0, Start Date)), (Fiscal Date (month, 0, End Date)), month, false)

19.5.15 Calculation Run Date

Description: This function returns the date that a calculation run started.

Input: No input is needed; the function simply returns a date.

Output: The date of a calculation run (Date return type)

19.6 Ranking Functions

Use the ranking functions when writing secondary measurement, incentive or deposit rules.

Overview of Ranking Functions

The functions calculate the rank of the given measurement or incentive for the current position in the population.

Ranking Functions

| Function Name | Description |
|---|--|
| Rank By Measurement | Ranking function available in secondary measurement, incentive and deposit rules which returns the rank of the given measurement for the current position in the population. |
| Rank By Incentive | Ranking function available in incentive and deposit rules which returns the rank of the given incentive for the current position in the population. |
| Total Population for Ranked Measurement | Ranking function available in secondary measurement, incentive and deposit rules which returns the size of the ranking population for the given measurement. |
| Total Population for Ranked Incentive | Ranking function available in incentive and deposit rules which returns the size of the ranking population for the given incentive. |

The following table contains the details that you input into the ranking functions.

Arguments for Ranking Functions

| Argument | Possible Value |
|-------------------------------|---|
| Measurement or Incentive Name | Measurement or Incentive input reference used in ranking. |

| Argument | Possible Value |
|---|---|
| 1st GA Index for Grouping | Required parameter which specifies the first generic attribute index in the position that can be used to group the population for ranking. |
| 2nd GA Index for Grouping | Optional parameter which specifies additional generic attribute index in the position that can be used to group the population for ranking. |
| 3rd GA Index for Grouping | Optional parameter which specifies additional generic attribute index in the position that can be used to group the population for ranking. |
| GB Index for Filtering | Optional parameter which specifies the generic boolean index in the position that can be used to filtering out position in the ranking. If set, all the position with "r;false" or null value in the specified generic boolean index will be excluded from the ranking. |
| Use dense ranking? (Only in "Rank by..." functions) | The required parameter which specifies the tie option. If true, the next rank after the tie will be the next consecutive number. If false, the next rank after the tier will be the next consecutive number plus number of tie. Example: if we have to rank the values \$300, \$200, \$200, \$100, it will be ranked as 1, 2, 2, 3. |
| Use descending ranking? (Only in "Rank by..." functions) | The required parameter which specifies the sorting order for the rank. If true, the measurement/incentive with the highest value will be ranked as number one. If set to false, lowest value will be ranked as number one. |

19.6.1 Rank By Measurement () and Rank By Incentive ()

Description: Use these functions to determine the rank of the given measurement or incentive for the current position in the population.

Input:

- Measurement or Incentive
- 1st GA Index for Grouping
- 2nd GA Index for Grouping
- 3rd GA Index for Grouping
- GB Index for Filtering
- Use dense ranking?
- Use descending ranking?

Output: A quantity value, which corresponds to the current position rank.

Example:

Suppose there are 14 positions with the following attributes:

| Position Name | Generic Attribute 1 | Generic Attribute 2 | Generic Attribute 3 | Generic Boolean 1 | Incentive name | Incentive Value |
|---------------|---------------------|---------------------|---------------------|-------------------|------------------|-----------------|
| Position 1 | District1 | Team1 | null | true | IR_AE Commission | \$100 |
| Position 2 | District1 | Team1 | null | true | IR_AE Commission | \$200 |
| Position 3 | District1 | Team1 | null | true | IR_AE Commission | \$300 |
| Position 4 | District1 | Team1 | null | true | IR_AE Commission | \$400 |
| Position 5 | District1 | Team2 | null | true | IR_AE Commission | \$500 |
| Position 6 | null | null | null | null | IR_AE Commission | \$600 |
| Position 7 | District1 | Team2 | null | true | IR_AE Commission | \$600 |
| Position 8 | District1 | Team2 | null | false | IR_AE Commission | \$400 |
| Position 9 | District1 | Team2 | null | true | IR_AE Commission | \$300 |
| Position 10 | District2 | Team1 | null | true | IR_AE Commission | \$200 |
| Position 11 | District2 | Team1 | null | true | IR_AE Commission | \$300 |
| Position 12 | District2 | Team2 | null | true | IR_AE Commission | \$400 |
| Position 13 | District2 | Team2 | null | true | IR_AE Commission | \$500 |
| Position 14 | District2 | Team2 | null | true | IR_AE Commission | \$600 |

Rank By Incentive function is going to produce the following result:

| Position Name | Rank By Incentive (IR_AE Commission, 1,2,Any, 1,true,true) |
|---------------|--|
| Position 1 | 4 |
| Position 2 | 3 |
| Position 3 | 2 |
| Position 4 | 1 |
| Position 5 | 2 |
| Position 6 | - |
| Position 7 | 1 |
| Position 8 | - |
| Position 9 | 3 |
| Position 10 | 2 |
| Position 11 | 1 |
| Position 12 | 3 |
| Position 13 | 2 |
| Position 14 | 1 |

19.6.2 Total Population for Ranked Measurement () and Total Population for Ranked Incentive ()

Description: Use these functions to determine the size of the ranking population for the given measurement or incentive.

Input:

- Measurement or Incentive
- 1st GA Index for Grouping
- 2nd GA Index for Grouping
- 3rd GA Index for Grouping
- GB Index for Filtering

Output: A quantity value, which corresponds to the size of the ranking population.

Example:

Suppose there are 14 positions with the following attributes:

| Position Name | Generic Attribute 1 | Generic Attribute 2 | Generic Attribute 3 | Generic Boolean 1 | Incentive name | Incentive Value |
|---------------|---------------------|---------------------|---------------------|-------------------|------------------|-----------------|
| Position 1 | District1 | Team1 | null | true | IR_AE Commission | \$100 |
| Position 2 | District1 | Team1 | null | true | IR_AE Commission | \$200 |
| Position 3 | District1 | Team1 | null | true | IR_AE Commission | \$300 |
| Position 4 | District1 | Team1 | null | true | IR_AE Commission | \$400 |
| Position 5 | District1 | Team2 | null | true | IR_AE Commission | \$500 |
| Position 6 | null | null | null | null | IR_AE Commission | \$600 |
| Position 7 | District1 | Team2 | null | true | IR_AE Commission | \$600 |
| Position 8 | District1 | Team2 | null | false | IR_AE Commission | \$400 |
| Position 9 | District1 | Team2 | null | true | IR_AE Commission | \$300 |
| Position 10 | District2 | Team1 | null | true | IR_AE Commission | \$200 |
| Position 11 | District2 | Team1 | null | true | IR_AE Commission | \$300 |
| Position 12 | District2 | Team2 | null | true | IR_AE Commission | \$400 |
| Position 13 | District2 | Team2 | null | true | IR_AE Commission | \$500 |
| Position 14 | District2 | Team2 | null | true | IR_AE Commission | \$600 |

Total Population for Ranked Incentive function is going to produce the following result:

| Position Name | Total Population for Ranked Incentive (IR_AE Commission, 1,2,Any,1) |
|---------------|---|
| Position 1 | 4 |
| Position 2 | 4 |
| Position 3 | 4 |
| Position 4 | 4 |
| Position 5 | 3 |
| Position 6 | - |
| Position 7 | 3 |
| Position 8 | - |
| Position 9 | 3 |
| Position 10 | 2 |
| Position 11 | 2 |
| Position 12 | 3 |
| Position 13 | 3 |
| Position 14 | 3 |

19.7 Position Proration Functions

Description: New rules are added to accommodate customer's needs like Pro-ration functions. Use the following data field functions to calculate the number of days within a period or date range that a position assignment is effective for calculation processing or credit allocation. If a period type is specified, Commissions looks within the period type in which the date of the calculation run occurs.

- Position.Processing Days Between Dates()
- Position.Processing Days in Period()
- Position.Receiving Credit Days Between Dates()
- Position.Receiving Credit Days in Period()

If the position has multiple effective versions, Commissions looks for the combination of position and participant (the position assignment) that is effective during the current period and looks at all effective versions of the position for that position assignment.

For example, a position assignment's processing dates are effective as follows:

Position processing effective 1/1/08 to 4/30/08: Mary assigned to Sales Rep Position

Position processing not effective 5/1/08 to 8/30/08: Mary on leave

Position processing effective again 9/1/08 to End Of Time: Mary assigned to Sales Rep Position

For this type of situation, Commissions looks for not just the current version of the position assignment, but also previous versions of the same position assignment. In this case, if a rule used the Position.Processing Days in Period (period type=year) function, Commissions would return the number of days between 1/1/08 to 4/30/08 and also the days from 9/1/08 to 12/31/08.

Input: Depending on the function that you are using, specify a period type or a start date and end date. (To specify a period type, first enter "period type," and then specify the required period type.)

Output: An integer value (Integer return type).

Example: A bonus eligibility condition could be that participants must be assigned to their position (and eligible for processing) for at least 80 days in the quarter. You could use the Position.Processing Days in Period function to determine if the position assignment is eligible for the bonus.

The condition in the incentive rule would look as follows:

Position.Processing Days in Period (quarter) >= 80

Related Articles

- [Participant Proration Function \[page 296\]](#)

19.7.1 Participant Proration Function

Description: Three meta functions are provided to support the proration scenario:

- Participant.Start Date In Current Position()
- Participant.End Date In Current Position()
- Participant.Percentage of Days In Current Position()

Input: Null (no inputs required)

Output: Date and Percentage.

1. Participant.Start Date In Current Position()

Meta function on participant object returns the startDate of the position assignment. If there are multiple versions of the position assigned to the participant, it returns the startdate on the first version of the position.

For example:

On 1/1, Mary was assigned the DM position, on 1/10, there is a change on the target Compensation on DM position, so a new version of the position was created. On 1/15, Mary was promoted on a new position and John was assigned with the DM position. Also Mary's on DM Position's processingDate was extended to End of year.

VP Position <-----v1-----> EffDate

Mary

DM Positon <----- v1 -----><----- v2 ----><----- v3 -----> EffDate |----->
ProcessingDate

1/1/99 Mary 1/10/99 Mary 1/15/99 John 1/1/00

When calculation was running on December, we would have three BusinessNode as follow:

1. BN1(DM, Mary)
 2. BN2(DM, Jonh)
 3. BN3(VP, Mary)
- BN1's startDateInCurrentPosition would be 1/1/99
 - BN2's startDateInCurrentPosition would be 1/15/99
 - BN3's startDateInCurrentPosition would be 1/15/99

2. Participant.End Date In Current Position()

Meta function on participant object returns the endDate of the position assignment. If there are multiple versions of the position assigned to the participant, it returns the enddate on the last version of the position.

For example:

On 1/1, Mary was assigned the DM position, on 1/10, there is a change on the targetCompensation on DM position, so a new version of the position was created. On 1/15, Mary was promoted on a new position and John was assigned with the DM position. Also Mary's on DM Position's processingDate was extended to End of year.

VP Position <-----v1-----> EffDate

Mary

DM Positon <----- v1 -----><----- v2 ----><----- v3 -----> EffDate |----->
ProcessingDate

1/1/99 Mary 1/10/99 Mary 1/15/99 John 1/1/00

When calculation was running on December, we would have three BusinessNode as follow:

1. BN1(DM, Mary)
 2. BN2(DM, Jonh)
 3. BN3(VP, Mary)
- BN1's endDateInCurrentPosition would be 1/15/99
 - BN2's endDateInCurrentPosition would be 1/1/00
 - BN3's endDateInCurrentPosition would be 1/1/00

3. Participant.Percentage of Days In Current Position()

Calculates the percentage of days the participant was in the current position for the current processing period. To implement proration, the above function will be used in conjunction with the Date function such as Measure Time Overlap Percentage.

BN1.v1.targetComp = \$100k

BN1.v2.targetComp = \$110k

BN2.targetComp = \$150k

BN3.targetComp = \$200k

BN4.targetComp = \$500k

Annual Bonus:

val = PercentageTimeOverlap(Participant.StartDateInCurrPos, Participant.EndDateInCurrPos, 1/1/99, 1/1/00)
Position.targetComp * 5%

BN1(DM, Mary) = (221 / 365) * 110k * 5% = \$3,330.14

BN2(DM, Jonh) = (144 / 365) * 150k * 5% = \$2,958.90

BN3(VP, Mary) = (144 /365) * 200k * 5% = \$3,945.21

BN4(SVP, George) = (11 / 365) * 500k * 5% = \$753.42

MBO Bonus for Dec:

val = PercentageOfDaysInCurrentPosition() * Position.salary * 1%

BN1(DM, Mary) = (0 / 31) * 110k * 1% = \$0.00

BN2(DM, John) = (31 / 31) * 150k * 1% = \$1,500.00

BN3(VP, Mary) = (31 / 31) * 200k * 1% = \$2,000.00

BN4(SVP, George) = (11 / 31) * 500k * 1% = \$1,774.19

19.8 Query Functions

Query Functions

The query functions allow you to execute queries during the pipeline run, instead of writing custom store procedures. The data retrieved from these queries can be further used by the professional services team to create a custom SQL query to extend the functionality of the product.

The following parameters are the same for all query functions:

- Name of the query (required)
- String parameter which can be referenced in the query (optional)
- String parameter which can be referenced in the query (optional)
- Value parameter which can be referenced in the query (optional)
- Value parameter which can be referenced in the query (optional)
- Boolean parameter which can be referenced in the query(optional)
- Boolean parameter which can be referenced in the query(optional)
- Date parameter which can be referenced in the query (optional)
- Date parameter which can be referenced in the query (optional)
- Default value which will be returned if the query returns no result or null (optional)

Important points to note about the custom SQL query:

- The query can put in the compensation rule.
- The query supports all the common return types, such as Value, Number String, Date and Boolean.

- The query can reference context values, such as current period, current transaction, current position, and current payee in the SQL.
- The query can reference user provided parameters that are to be used in the SQL.
- DML or DDM operations in the SQL, such as Update, Delete, Insert, Create, Alter, etc. are restricted.
- The query is not visible in the UI.
- The query is timed out if it runs longer than 5 seconds.
- The query is profiled.

Example of the Query for Value function:

```

Query for Value ( |Query Name| , <String parameter> , <String parameter> , <Value parameter> , <Value parameter>
, <Boolean parameter> , <Boolean parameter> , <Date parameter> , <Date parameter> , <Default value> )|||

```

See [Example Usage: Query for Value \[page 302\]](#) for more details.

19.8.1 Query for Value

Description: Use this query in the compensation rule or formula in SAP Commissions. This function runs the query specified in the first parameter and returns back a Value object (a double value with a unitType).

The implementation of this query is specified in the CS_PluginQuery table by the professional services team.

Context Variables: The following context variables can be used to reference values in the current processing context:

- \$pipelineRunSeq - current pipeline run's pipelineRunSeq
- \$pipelineRunDate - current pipeline run's startTime
- \$modelSeq - current pipeline run's modelSeq
- \$periodSeq - current pipeline run's periodSeq
- \$calendarSeq - current pipeline run's calendarSeq
- \$processingUnitSeq - current pipeline run's processingUnitSeq
- \$periodStartDate - current pipeline run period's startDate
- \$periodEndDate - current pipeline run period's endDate
- \$lastDateInPeriod - current pipeline run period's lastDate (i.e. endDate minus one second)
- \$tenantId - current tenantId
- \$positionSeq - current position in the processing
- \$positionName - name of the current position in the processing
- \$positionEffectiveStartDate - effectiveStartDate of the current position in the processing
- \$positionEffectiveEndDate - effectiveEndDate of the current position in the processing
- \$positionProcessingStartDate - processingStartDate of the current position in the processing
- \$positionProcessingEndDate - processingEndDate of the current position in the processing
- \$positionCreditStartDate - creditStartDate of the current position in the processing
- \$positionCreditEndDate - creditEndDate of the current position in the processing
- \$payeeSeq - current payee in the processing
- \$ruleSeq - current rule in the processing
- \$planSeq - current plan in the processing

- \$salesTransactionSeq - current sales transaction in the processing (only apply in Allocate stage)
- \$compensationDate - compensation date of the current sales transaction in the processing (only apply in Allocate stage)
- \$salesOrderSeq - current sales order in the processing (only apply in Allocate stage)
- \$creditSeq - current credit in the processing (only apply in Allocate stage)

Parameter Variables: The following parameter variables can be used as values in the **input parameter** of the query function:

- \$1 - value of the first String parameter in the Query function. (first String parameter)
- \$2 - value of the second String parameter in the Query function (second String parameter)
- \$3 - value of the first Value parameter in the Query function (first Value parameter)
- \$4 - value of the second Value parameter in the Query function (second Value parameter)
- \$5 - value of the first Boolean parameter in the Query function (first Boolean parameter)
- \$6 - value of the second Boolean parameter in the Query function (second Boolean parameter)
- \$7 - value of the first Date parameter in the Query function (first Date parameter)
- \$8 - value of the second Date parameter in the Query function (second Date parameter)

Input: Query from the first parameter.

Output: A value object.

Formula: Query for Value (<query name>, <string parameter>, <string parameter>, <value parameter>, <value parameter>, <boolean parameter>, <boolean parameter>, <date parameter>, <date parameter>, <default values>)

The constraint of the query:

- Only the SELECT SQL function is allowed, any other type of SQL like INSERT, UPDATE, DELETE will fail.
- The query has to finish within 5 seconds, or it will be canceled. (The query will be terminated and the pipeline will continue.)
- Query has to project (i.e. select) two columns, first column is the value and second column is the unitTypeForValue (Example: select value, unitTypeForValue from CS_SalesTransaction).
- If the query returns multiple rows, only the first row's value will be returned.

Related Information

[Query for Value \[page 299\]](#)

[Example Usage: Query for Value \[page 302\]](#)

19.8.2 Query for String

Description: Use this query in the compensation rule or formula in SAP Commissions. This function runs the given query in the first parameter and returns a String object.

Input: Query from the first parameter. Input parameters are similar to the [Query for Value \[page 299\]](#) function.

Output: A string object.

Formula: Query for String (<query name>, <string parameter>, <string parameter>, <value parameter>, <value parameter>, <value parameter>, <boolean parameter>, <boolean parameter>, <date parameter>, <date parameter>, <default value>)

The constraint of the query:

- Only "SELECT" SQL is allowed, any other type of SQL like "INSERT, UPDATE, DELETE" will fail.
- The query has to finish within 5 seconds, or it will be canceled. (The query will be terminated and the pipeline will continue.)
- Query has to project (i.e. select) one column of type varchar2 (Example: select productId from CS_SalesTransaction where salesTransactionSeq = \$salesTransactionSeq).
- If the query returns multiple rows, only the first row's value will be returned.

Related Information

[Example Usage: Query for Value \[page 302\]](#)

19.8.3 Query for Boolean

Description: Use this query in the compensation rule or formula in SAP Commissions. This function runs the given query in the first parameter and returns a Boolean object.

Input: Query from the first parameter. Input parameters are similar to the [Query for Value \[page 299\]](#) function.

Output: A boolean object.

Formula: Query for Boolean (<query name>, <string parameter>, <string parameter>, <value parameter>, <value parameter>, <boolean parameter>, <boolean parameter>, <date parameter>, <date parameter>, <default values>)

The constraint of the query:

- Only the SELECT SQL query is allowed, any other type of query such as INSERT, UPDATE, DELETE will fail.
- The query has to finish within five seconds, or it will be canceled. (The query will be terminated and the pipeline will continue.)
- Query has to project (i.e. select) two columns, first column is the value and second column is the unitTypeForValue (Example: select value, unitTypeForValue from CS_SalesTransaction).
- If the query returns multiple rows, only the first row's value will be returned.

Related Information

[Example Usage: Query for Value \[page 302\]](#)

19.8.4 Query for Date

Description: Use this query in the compensation rule or formula in SAP Commissions. This function runs the given query in the first parameter and returns a Date object.

Input: Query from the first parameter. Input parameters are similar to the [Query for Value \[page 299\]](#) function.

Output: A date object.

Formula: Query for Date(<query name>, <string parameter>, <string parameter>, <value parameter>, <value parameter>, <boolean parameter>, <boolean parameter>, <date parameter>, <date parameter>, <default values>)

The constraint of the query:

- Only the SELECT SQL query is allowed, any other type of query such as INSERT, UPDATE, DELETE will fail.
- The query has to finish within 5 seconds, or it will be canceled. (The query will be terminated and the pipeline will continue.)
- Query has to project (i.e. select) one column of type Date (Example: select compensationDate from CS_SalesTransaction where salesTransactionSeq = \$salesTransactionSeq).
- If the query returns multiple rows, only the first row will be returned.

Related Information

[Example Usage: Query for Value \[page 302\]](#)

19.8.5 Example Usage: Query for Value

This topic explains using the Query for Value function to implement the logic to *sum all the prior period sales transaction values for the current sales order* for tenant TNTA.

1. Add the query to the CS_PlugInQuery table. Login as the TNTAEXT user and issue the following insert statement:

Sample Code

```
INSERT INTO CS_PlugInQuery (tenantId, name, query)
VALUES (
  'TNTA',
  'Sum Prior Period Transactions In Order',
  'select sum(value), unitTypeForValue from CS_SalesTransaction
   where salesOrderSeq =  $salesOrderSeq and compensationDate <
   $periodStartDate
   group by unitTypeForValue')
```

2. Use the Query function in the Credit Rule and specify the name of the query populated in step 1:

Amount

Query for Value ("Sum Prior Period Transactions In Order", <String parameter>, <String parameter>, <Value parameter>, <Value parameter>, <Boolean parameter>, <Boolean parameter>, <Date parameter>, <Date parameter>, \$0.00)

i Note

A default value of \$0.00 (last parameter) is put to handle the case when the query doesn't return any result. \$0.00 will be returned in this case.

3. During the pipeline run, the query specified in the query function is executed. It returns the value and use in the Credit rule evaluation:

↳ Sample Code

```
ACTIONS
My Credit= RESULT( DIRECT_TRANSACTION_CREDIT_ALLGAs )
    queryForValue
        Sum Prior Period Transactions In Order
        null
        null
        null
        null
        null
        null
        null
        null
        null
        0 USD
JDBC: select sum(value), unitTypeForValue from CS_SalesTransaction where
salesOrderSeq = 14355223812243459 and compensationDate < to_date('February
1, 2006 12:00:00 AM', 'Month dd, yyyy HH:MI:SS AM') group by
unitTypeForValue
    = RESULT( 200 USD )
```

Best Practices:

- Use the context variable (Example: \$periodStartDate, \$periodEndDate) instead of the parameter variable (\$1 to \$8), if possible. This will perform better because the query doesn't need to process the input parameter. It also makes your query less dependent on the user provided value which can be changed.
- Provide a default value for your function so that the log file does not generate warning messages for null values.
- If you have a complex query that needs to join many tables or a query with large volume of data, use a stage hook to pre-generate the result in bulk and populate it in the EXT table and then use the Query function to query the result from that table. This will significantly improve the performance, while allow the query to process each SalesTransaction for each Rule in the Allocate stage.

Related Information

[Query Functions \[page 298\]](#)

[Query for Value \[page 299\]](#)

[Query for String \[page 300\]](#)

[Query for Boolean \[page 301\]](#)

[Query for Date \[page 302\]](#)

20 Plug-in Function Support

Commissions provides the ability to implement plug-in rule functions. Plug-in rule functions provide functionality that Commissions does not otherwise provide.

i Note

If your organization uses any plug-in functions, your Legal Moves window might look different than those shown in this manual. To obtain a compensation rule function that can be customized for your organization, contact the Callidus Cloud Technical Support group.

21 Calculations Overview

You typically run the calculation to create results data at least once a period. You do not see results data until you have run the calculation at least once. The *Calculations* tab is accessed through the *Review Calculations* card in the *Commissions Home* page. See the Commissions Administrator Help for information on running the calculation. In addition to the *Calculations* workspace, the following transaction data (orders and transactions) and results data (credits, measurements, incentives, commissions, deposits, and payments) are also accessible from the *Calculations* tab.

Related Articles

- [Orders, Transactions, and Credits in Tree View \[page 305\]](#)
- [About Orders \[page 306\]](#)
- [About Transactions \[page 308\]](#)
- [About Credits \[page 315\]](#)
- [About Measurements \[page 326\]](#)
- [About Commissions \[page 329\]](#)
- [About Deposits \[page 330\]](#)

21.1 Orders, Transactions, and Credits in Tree View

In tree view, the *Orders*, *Transactions*, and *Credits* 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, created by TrueComp - are displayed.

i Note

If you do not have read permissions to Orders, the tree view is not available from the toolbar in the *Transactions* or *Credits* workspaces.

In the *Transactions* and *Credits* workspaces, objects can also be viewed in table view. The *Orders* workspace does not have a table view. If you search for a subset of the records (for example, all credits over a certain value), the tree view shows only the objects related to the ones that satisfy the query. For example, you would see only the orders and transactions that had credits over a certain value.

Manual orders, manual transactions, and manual credits - which are those created using SAP Commissions, rather than imported from an outside source - can be created in the tree view of all three workspaces as follows:

- To create a transaction related to a specific order, select the order and click *New*.

- To create a credit related to a specific transaction, select the transaction and click [New](#).
- To create an order, deselect all objects using [\[Ctrl\]](#) + [\[left-click\]](#), and then click [New](#).

21.2 About Orders

Orders are used to group transactions, and they are the basis of order credits. Orders can be imported with transactions.

Related Articles

- [Orders Workspace \[page 306\]](#)
- [Creating an Order \[page 306\]](#)
- [Finding Transactions and Credits Related to Orders \[page 307\]](#)

21.2.1 Orders Workspace

The [Summary](#) pane in the [Orders](#) workspace can be viewed only in list view. The detail pane of the Orders workspace can contain general information and [Transactions](#) tab. Custom attributes tab depending on whether or not your Commissions Administrator has enabled custom attributes for orders. The following figure shows the [Order](#) tab and the summary panel of the [Orders](#) workspace. Choose [Click to Count](#) link to display the total.

The screenshot shows the Orders workspace interface. At the top, there is a toolbar with various icons for managing data. Below it is a summary table titled "Order Summary (1)" showing one entry: "RK Order 0102(1)" with "Business Unit" as "US" and "Last Modified" as "1/2/2019, 11:10 AM". A dropdown menu indicates "Show 10 entries". Below the summary is the "Order Details" panel, which includes tabs for "General Information" and "Transactions". Under "General Information", there is a section for "Standard Fields" containing fields for "Order ID (Required)" (set to "RK Order 0102"), "Business Unit" (set to "US"), and "Last Modified (Required)" (set to "1/2/2019, 11:10 AM").

If several transactions are associated with the order and these transactions have different unit types, the values of the transactions with common unit types are subtotalized and displayed in the [Total](#) field. For example, if an order has six transactions in US dollars and two in yen, the dollar and yen values are subtotalized and displayed in the [Total](#) field.

21.2.2 Creating an Order

You can create an order from the [Orders](#) and [Transactions](#) workspaces.

Procedure to create an Order:

1. Click [Calculation](#).
2. Click [Orders](#), which takes you to the order's workspace.
3. Click [Add \(new\)](#), which displays orders in the **details pane**.
4. Type the [Order ID](#) in the details panel.
 - If your organization has created and implemented business units, you can assign this rule to a business unit by selecting from the Business Units drop-down. Orders can be assigned to only one business unit. You can only select a business unit to which you as a user have been assigned. See the Commissions Administrator Help for more information about business units. If your Commissions Administrator has enabled custom attributes for orders, [Custom attributes](#) section is visible in general information tab to enter values in those fields.
5. Click [Save](#).
6. Click [Transactions](#) to see assigned transactions to a particular order.

i Note

You can move a transaction to an order by modifying the transaction's order ID.

i Note

After an order is either imported or created in SAP Commissions, you cannot delete it. You can delete manual transactions, however.

21.2.3 Finding Transactions and Credits Related to Orders

You can find transaction and credit data related to one or more orders by selecting the appropriate object option from the [Related](#) pane. The available options and the data returned are as follows:

- Transactions—returns the transactions referring to the selected order.
- Credits—returns the credits referring to the selected order.

To find transactions and credits related to orders:

1. Click [Calculation](#).
2. Click [Orders](#), which takes you to the order's workspace.
3. Search for the order or orders to which you want to find related objects.
4. Select the order or orders to which you want to find related transactions or credits in the [Summary](#) panel.
5. Select [Transactions](#) or [Credits](#) in the [Related](#) panel.

The [Search For Advanced Related Objects](#) dialog displays you with the name of the selected object substituted for the object name.

21.3 About Transactions

Transactions are the basis for direct and rolled transaction credits, which are allocated to position assignments. Transactions are usually imported into Commissions from an external system, but can also be manually entered. Transactions and their associated orders can be imported.

Related Articles

- [Transactions Workspace \[page 308\]](#)
- [Creating a Manual Transaction \[page 309\]](#)
- [Specifying Payee Pre-Assignments \[page 311\]](#)
- [Modifying Transactions \[page 312\]](#)
- [Removing a Payee Pre-Assignment \[page 313\]](#)
- [Adjusting Transactions \[page 313\]](#)
- [Copying Transactions \[page 314\]](#)
- [Finding Objects Related to Components \[page 103\]](#)

21.3.1 Transactions Workspace

The Transactions workspace can be viewed in list view. The *Transactions* workspace can contain four tabs, depending on whether your Commissions Administrator has enabled custom attributes section is visible in general information tab depending , reporting attributes, or both, for transactions. In the Transactions workspace, you view transactions and create manual transactions (a manual transaction is a transaction created using Commissions, rather than imported from an outside source.) You can also see the orders that include the transactions. You can also modify or adjust one or more existing transactions. To modify a transaction is to change a specific field that does not affect the transaction's value. To adjust a transaction is to change the value of the transaction by either a fixed amount, by a percentage, or to an explicit amount.

Transactions Workspace in List View

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

Transaction Tab

Addresses Tab

From the Addresses tab, you can enter and modify Billing, Shipping, and Other Addresses.

Payee Pre-Assignment Tab(Participants Associated to the Transaction)

From the Payee Pre-Assignment tab, you can optionally specify information related to the position that should receive credit for the transaction. If generic attributes are enabled on transaction payee pre-assignments, you can use these generic

Adjustments Tab

From the Adjustments tab, you can view the adjustments that have been made to a selected transaction. For example, if the adjustment was an adjustment to a specific value, Commissions displays `adjustTo` in the Adjustment Type column in the detail pane (If the Adjustment Type column is not displayed, use the scroll bar in the detail pane.) If the adjustment was by a percentage or a specific value, Commissions displays `adjustBy`.

21.3.2 Creating a Manual Transaction

If you do not import transactions, you can create manual transactions. You can also create manual transactions if you need to create placeholders for credits.

To create a manual transaction from the Transactions workspace:

1. Click *Transactions* from the *Calculation* tab.
2. Click *Add (New)* The detail panel displays fields for the new transaction.
3. Enter the transaction information

Transaction Tab Fields

| Field | Description |
|---------|--|
| Order | (Required) The order identification number to which the created transaction belongs. |
| Line | (Required) The line number to which the created transaction belongs. |
| Subline | (Required) The subline number. |

| Field | Description |
|---------------------|---|
| Event Type | (Required) Choose one of these user-defined event types to describe the kind of event that precipitated the transaction. For example, booking or shipping. See the Commissions Administrator Help for information on creating custom event types. |
| Alt Order ID | The alternate order ID. This ID can be used to track third-party sales order numbers. |
| Compensation Date | (Required) The date when the transaction is effective for processing. You can enter a date or select a date using the Calendar field button. |
| Acct Date | The date the transaction occurred. You can enter a date or select a date using the Calendar field button. Commissions defaults this to the current date. |
| Channel | The name of the channel through which the product was sold. |
| PO Number | The customer's purchase order number. |
| Terms | The payment terms of the transaction. |
| Reason Code | A code that indicates the reason for the credit. Reason codes must be created by your Commissions Administrator. See the Commissions Administrator Help for more information on reason codes. |
| Origin Type | (Read-only) Commissions sets this field to report whether the deposit was calculated, imported, or manually created. |
| Business Units | (Read-only) Commissions automatically sets the business unit on the transaction to match the business unit assignment on the order. See the Commissions Administrator Help for more information about business units. |
| Comments | Enter any applicable description or comments. |
| Product ID | The product's identification number or string. (Currently, you must enter this information manually.) |
| Product Name | The name of the product. (Currently, you must enter this information manually.) |
| Product Description | A short description of the product. |
| Num Units | The number of product units sold. You can enter a decimal value if the scale of your quantity unit type is not zero. A decimal value might be required if two salespeople working together on a sale, must be credited for the sale of half (0.5) a unit. |
| Unit Value | The value of each product unit. Click the Unit Type field button to select a unit type. The options are currency, percent, quantity, and integer. See the Commissions Administrator Help for more information on unit types. |
| Value | (Required) The value of the transaction. Click the Unit Type field button to select a unit type. The options are currency, percent, quantity, and integer. |

| Field | Description |
|-----------------|--|
| Preadjusted | (Read-only) The amount of the transaction before any adjustments have been made. Commissions populates this with the initial transaction's value. |
| Native Amount | If the value is in another currency, you can enter that amount here. If more than one currency unit type has been defined, click the Unit Type field button to select a unit type. |
| Native Currency | (Read-only) The currency value for the Native Amt. |
| Discount | The percentage amount of any applicable discount. |
| Discount Type | If you specify a discount, specify the type here. |
| Data Source | Indicates where the transaction originated from. For example, from a the third-party order entry system. |
| Runnable | Whether or not the transaction is available to be processed by the calculation. Commissions automatically marks new transactions as runnable. |

1. (Optional) Click the *Addressees* tab and enter the address details:

Addresses Tab Fields

| Address Type | Description |
|---|---|
| Billing (click Add Address to display the Billing fields) | The customer's billing address. |
| Shipping (click Add Address to display the Shipping fields) | The customer's shipping address. |
| Other (click Add Address to display the Other To fields) | If applicable, another relevant customer address. |

You can search for addresses based on the above address fields.

1. (Optional) To specify payee pre-assignments, click the Payee Pre-Assignment(Participants Associated to the Transaction) tab.
2.
 - o If your Commissions Administrator has enabled custom attributes for transactions, custom attributes are visible in general information tab
 - o If your Commissions Administrator has enabled reporting attributes for the Transactions workspace, Reporting Attributes section is visible in the general information tab, to enter values in those fields.
3. Click *Save*.

SAP Commissions records the transaction.

21.3.3 Specifying Payee Pre-Assignments

Payee pre-assignment is an optional feature. If your transactions are pre-assigned to participants (payees), positions, titles, or a combination of the three, you can create credit rules to filter transactions based on their pre-assignment. See the Commissions Administrator Help for more information about how pre-assigned transactions are processed.

Additionally, if you have enabled generic attributes on transaction payee pre-assignments, you can use these generic attributes in direct transaction credit rules. These generic attributes can be used, for example, to specify a credit split for a shared transaction between one or more positions where each position is assigned its own specific rate for the split.

Specifying payee pre-assignment:

1. Click *Transactions* from the *Calculation* tab.
2. Search for the transaction or transactions to which to add payee pre-assignments if required.
3. Select the transaction.
4. Click the *Payee Pre-Assignment* tab if required.
5. Click *Add* in the detail panel. A new index number is automatically created.
Each index specifies a payee, position, or title or a combination of two or more of the three. The calculation uses this information to identify each grouping of payee pre-assignment information. Use multiple indexes to assign the same transaction to different combinations of participants, positions, and titles.
6. To specify the information to be used to determine who should receive credit for the transaction, do one or all of the following:
 - Specify a participant name in the Payee field. Although data is entered by participant name, Commissions populates the Payee field with the participant ID when you navigate to another field, for example, Position, or click Save.
 - Specify a position name in the Position field. Only positions that are associated with the same processing unit as the transaction can be selected. See the Commissions Administrator Help for more information on processing units and the mapping of business units to them.
 - Specify a title name in the Titles field.
 - If generic attributes for Transaction Payee Pre-assignments are enabled, you can add information in the generic attribute fields for each index.

i Note

If the message "r; Please enter a compensation date" displays when you are specifying information, you must enter a compensation date for the associated transaction in the Transaction tab. You cannot add payee pre-assignment information without a compensation date.

For example, if the credit for a transaction should be split across two or more positions, you can add an indexed payee pre-assignment record for each position then specify the percentage split for each position in a designated generic number field on each record.

7. Repeat Steps 5 and 6 to add additional indexes.
8. Click *Save*.

21.3.4 Modifying Transactions

To modify a transaction is to change a specific field that does not affect the transaction's value. For example, you can modify the comments on a transaction. Modifying a transaction sets it as runnable.

To modify one or more transactions:

1. Click *Transactions* from the *Calculation* tab.
2. Search for the transaction(s) you want to modify.
3. Select the transaction or transactions to be modified.

4. click the *Transactions* tab.
5. Change the appropriate fields in the detail pane.

You can modify any field except the following:

- Order
- Line
- Subline
- Origin
- Value (to change this, you must click *Adjust*)
- Preadjusted Value
- Business Unit

When you modify any of the transaction fields, Commissions automatically resets the transaction's runnable status. This allows credits and other results data from the transaction to be recalculated when you next run the calculation. The runnable attribute has a checkbox in the Transactions detail pane; after you modify any transaction attribute, Commissions checks this box.

1. Click *Save*.

21.3.5 Removing a Payee Pre-Assignment

Payee pre-assignments must be manually removed from a transaction if the position, title, or payee to which they refer is removed. If the association is not removed, a warning is generated by the calculation.

To remove a payee pre-assignment:

1. Click *Transactions* from the *Calculation* tab.
2. Search for the transaction from which the payee pre-assignment is to be removed.
3. Select the *Transaction*.
4. Click the *Payee Pre-Assignment* tab.
5. Select the pre-assignment or pre-assignments to be removed.
6. Click *Remove*.
7. Click *Save* to save the transaction.

21.3.6 Adjusting Transactions

When you adjust a transaction, Commissions creates an adjustment entry in the Commissions. If you make more than one adjustment to a transaction, a separate record is created for each adjustment and Commissions updates the transaction value accordingly. You might want to adjust a transaction if you find that an imported or manual transaction has an error, such as an incorrect amount. When you adjust a transaction, Commissions automatically marks the transaction as runnable so that it gets processed in the next calculation run.

To adjust one or more transactions:

1. Click *Transactions* from the *Calculation* tab.
2. Search for the transaction or transactions you want to adjust.

3. Select the transaction or transactions.
 4. Click *Transactions* tab if required.
 5. Click *Adjust* button located next to the *Value* field in the detail panel.
 6. Perform the following in the *Adjust* dialog:
 - Specify one of the following adjustment options:
 - Adjust by - adjusts the transaction value by a percentage or a specific currency amount depending on the unit type specified. To specify a unit type, click the Unit Type field button. For example, if the original value is \$100, Adjust by 10% sets the value to \$110.
 - Adjust to - adjusts the transaction to an amount. To specify a currency unit type other than the one assigned to the original transaction, click the Unit Type field button. For example, if the original value is \$100, Adjust to 200 sets the value to \$200
 - Reset - to change the adjusted value back to the original value.
- i Note**
- If you adjust the same transaction multiple times, do not mix adjustment types. For example, do not switch between Adjust by and Adjust to types for the same transaction.
- If your Commissions Administrator has created reason codes, you can select a code that indicates the reason for the adjustment.
 - See the Commissions Administrator Help for more information on reason codes.
 - (Optional) In the Comments field, enter text that describes the adjustment.
 7. Click *Close* to close the *Adjust* dialog.
 8. Click *Adjust* to save the adjusted transaction.

Commissions records the adjustment. The adjusted transaction is processed in the next calculation run for the period in which the transaction's compensation date occurs.

21.3.7 Copying Transactions

You can copy any of the transactions shown in the summary pane and change any of the detail information about the copy. Most commonly, you change the order and line numbers to copy the transaction to a different order.

To copy a Transaction:

1. Click *Transactions* from the *Calculation* tab.
2. Search for the transaction to be copied.
3. Search for the transaction and select it in the *Summary* panel.

i Note

You can copy only one transaction at a time.

4. Click *Copy* in the *Action* panel.
 - Commissions copies the highlighted transaction and inserts it at the top.
 - To change details for the copied transaction, edit the fields as needed. For example, to copy the transaction to a different order, edit the Order and Line fields.
5. Click *Save*.

21.3.8 Finding Objects Related to Transactions

You can find data related to one or more selected transactions by selecting the appropriate object option from the Related pane. The available options and data returned are as follows:

- **Credits**—returns the credits referring to (or generated by) the selected transaction.
- **Commissions**—returns the commissions referring to (or generated by) the selected transaction
- **Orders**—returns the orders referring to the selected transaction.
- **Product**—returns the products referred to by the selected transactions that meet the classification rule criteria of the product's parent category hierarchy and have a compensation date within the specified default period.
- **Customer**—returns the customers referred to by the selected transaction that meets the classification rule criteria of the customer's parent category hierarchy and has a compensation date within the specified default period.
- **Generic Classifiers**—returns the objects referred to by the selected transactions that meet the classification rule criteria of the generic classifier's parent category hierarchy and have a compensation date within the specified default period. Generic classifiers must be enabled to view this option.
- **Postal Code**—returns the postal codes referred to by the selected transactions that meet the classification rule criteria of the postal code's parent category hierarchy and have a compensation date within the specified default period.

i Note

To search for pre-assigned transactions, use the Advanced Search window and search for Transaction.Transaction Payee Pre-Assignments.* fields. These are Comp Date, Order, Payee ID, Position Name, Title Name, and Generic Attributes (if enabled).

To find objects related to transactions:

1. Click *Transactions* from the *Calculation* tab.
 2. Search for the transaction or transactions for which you want to find related objects.
 3. Select the transaction or transactions for which you need to find related objects.
 4. Select an object option, for example, Credits in the Related panel.
- If you are searching for products, customers, postal codes or objects associated with user-defined classifier types, the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message "No Records Found"? is displayed. Classification data searches use NamedQuery and don't display a Simple Search dialog.

If you are searching for credits or orders, the Search For Related Objects dialog displays with the name of the selected object substituted for the object name.

21.4 Credits Overview

In Commissions, the term credit indicates an allocation of the value of a sales transaction or an entire order to a position assignment. Credits are normally generated by credit rules, or they can be imported along with

transaction data, or manually entered in Commissions. You can transfer, modify, copy, or adjust credits from the [Credits](#) workspace. When you create, modify, or adjust a credit, Commissions automatically marks its related transaction as "runnable." When you next run the calculation in Incremental mode, Commissions reprocesses the transaction and recalculates all credits related to the transaction including the modified or adjusted credit. In addition, you can copy and transfer credits from one participant to another.

Related Articles

- [Credits Overview](#)
- [Credits Workspace \[page 316\]](#)
- [Creating a Manual Credit \[page 317\]](#)
- [Transferring Credits \[page 319\]](#)
- [Modifying a Credit \[page 321\]](#)
- [Adjusting Credits \[page 322\]](#)
- [Copying Credits \[page 323\]](#)
- [Setting a Credit's Release Date \[page 324\]](#)
- [Removing the Hold on a Credit \[page 325\]](#)
- [Finding Objects Related to Credits \[page 325\]](#)

21.4.1 Credits Workspace

The [Credits](#) workspace can be viewed in list view. The [Credits](#) workspace can contain two tabs, depending on whether your Commissions administrator has enabled custom attributes section then custom attributes section is visible in general information tab for credits.

Related Search Tab

From the [Related Search](#) icon, you can view the results data that contributed to a selected credit, as well as results data to which the credit contributed. For example, in the [Source](#) area on the left, the name of the source credit - along with the associated position, payee, and period name - is displayed with the credit value. In the [Contributing To](#) area on the right, the names of the credits contributed to and their values are displayed.

Adjustments Tab

The [Adjustments](#) tab displays adjustments that have been made to a selected credit. For example, if the adjustment was an adjustment to a specific value, SAP Commissions displays [adjust To](#) in the Adjustment Type column in the detail pane. (If the Adjustment Type column is not displayed, use the scroll bar in the detail pane.) If the adjustment was by a percentage or a value, Commissions displays [adjustBy](#).

21.4.2 Creating a Manual Credit

You can manually create a credit for a position assignment. For example, you might need to create a credit for the participant currently assigned to a position if that participant would otherwise not receive credit for a particular sales activity by way of the plan assignment's rules. You create a manual credit based on an order and a transaction.

i Note

When you create the credit, Commissions updates the Commissions. However, Commissions does not process the credit until the next time you run the calculation.

When creating a manual credit for a position assignment, the following must be true:

- The position must have an associated participant (not an empty position).
- The end date of the Period specified for the credit should be greater than the transaction compensation date. For example, if the Credit Period is January 2008, the transaction compensation date must be before than February 1, 2008.
- If Custom Processing Dates are enabled:
 - The compensation date for the credit must be within the processing effective dates (Is Processing dates) of the position. If custom processing dates are not enabled, Commissions uses the effective dates of the current version of the position.
 - The compensation date for the credit can be outside of the receiving credit effective dates of the position. However, the compensation date for the credit must still exist within the processing effective dates of the position.

If you create a manual credit based on a prior period transaction, you should create it as a held credit with a release date of the current period. A prior period credit would not be processed unless you run the period in which its compensation date occurs. For non-held credits, this is the same as the transaction's compensation date. For held credits, this is the same as the release date.

To create a manual credit from the Credits workspace:

1. Click *Credits* from the *Calculation* tab.
2. Enter required values as indicated in the following table from the detail panel.
3. Click *Add (new)*. The Credit editor opens.

| Field Name | Description |
|-------------|---|
| Transaction | (Required) The transaction associated with the credit. |
| Period | (Required) The period that contains the credit; use the drop-down menus to select the type of calendar (on the left) and the period (on the right). If the default period was selected, this defaults to the current period. If a date was selected, the period is empty. |
| Order | The order ID from which the credit originates. |

| Field Name | Description |
|-------------------|---|
| Position | (Required) The position that receives the credit. You can assign the credit only to position assignments that are effective at the time of the credit's compensation date. Only positions that are associated with the same processing unit as the transaction can be selected. See the Commissions Administrator Help for more information on processing units and the mapping of business units to them.<<10/04/07: Per AS, Orders always have a PU. If there is no Order BU, then the Order PU=Unassigned. You cannot assign a position that has a PU to an order that does not. You get this error message "r;Order Processing Unit and Position Processing Unit does not match..>> |
| Name | A unique identifier for the credit. This is a text field. |
| Title | The title associated with the position that receives the credit. |
| Value | (Required) The amount of the credit. You can click the Unit Type field button to select a unit type. |
| Create Date | For manual credits, defaults to the current date and is not editable. For calculated credits, indicates the when the credit was created by the calculation. |
| Credit Type | Select a credit type to indicate the source of the credit. The default credit types are commission, quota, order, and revenue, but additional credit types can be created. See the Commissions Administrator Help for information on credit types. |
| Preadjusted Value | (Required) The credit's value before any applicable adjustments or modifications. Commissions completes this field. |
| Compensation Date | Commissions completes this field. This is the credit's compensation date. This date determines in what period the credit is processed, and for a manual unheld credit, it is the same as the transaction's compensation date. For a manual held credit, this date is the same as credit release date.<<03/10/05: DI bug 18391. See also DI bug 22648.>> |
| Origin Type | Commissions sets this field to report whether the credit was calculated, imported, or manually created. |
| Rule | Reports the associated credit rule, if any (displays for calculated credits only). |

| Field Name | Description |
|--------------------------------------|---|
| Ever Held | Indicates whether the credit should be held and works in conjunction with the Release Date. <<11/20/06: Doc bug 31850.>> |
| Release Date **This is gone** | If Ever Held is enabled, you can specify a release date by entering a date or selecting a date using the Calendar field button. If the credit should be held indefinitely, leave release date blank. The release date is set to End Of Time. This field can be used to find credits that were held, even after they were released. |
| Is Rollable | Check the box to specify that the credit can be rolled to another position assignment. |
| Roll Date | The date Commissions uses to look up roll relationships in the relationships hierarchy. This is usually the compensation date of the associated transaction. You can enter a date or select a date using the Calendar field button. |
| Reason Code | A code that indicates the reason for the credit. Reason codes must be created by your Commissions Administrator. See the Commissions Administrator Help for more information on reason codes. |
| Comments | User-entered comments, if applicable. |
| Business Units | (Read-only) Commissions automatically sets the business unit on the credit to match the business unit assignment on the position. See the Commissions Administrator Help for more information about business units. |

- Click **Save**. Commissions saves the manual credit and the next calculation run processes it.

21.4.3 Transferring Credits

You can transfer one or more transaction-level credits between positions assigned to participants. For example, you might need to do this if one salesperson sold a product in another salesperson's territory, and you must manually give part of the credit for the sale to the original salesperson.

i Note

You cannot transfer order-level credits. An order-level credit is a credit that is generated by a credit rule that has a source of order.

Commissions facilitates transferring credits from one participant to another by establishing audit trails for credit transfers. Each time you transfer a percentage or value amount of a credit to a participant, Commissions

creates as an adjustment to the existing credit. The transferred item is stored as a new, manual credit. Transferring a credit causes the transactions associated with both the original credit and the new credit to be considered as runnable.

i Note

When you transfer the credit, Commissions updates the TrueComp Repository. However, Commissions does not process the transferred credit until the next time you run the calculation.

To transfer a credit to another participant, perform the following steps:

1. Click *Credits* from the *Calculations* tab.
1. Search for the credit to be transferred.
2. Select a credit in the *Summary* panel.
3. Click *Credit tab*.
4. Click *Transfer* which is next to the *Value* field. The *Transfer* dialog displays.
5. Enter the following information in the *Transfer* dialog:

| Operator | Description |
|-------------|---|
| Amount | (Required) Enter a number, and click the Unit Type field button to specify whether a percentage of compensation or an exact monetary amount to compensation should be transferred. For example, to transfer 10% of \$100 credit, enter 10 and select the percent unit type. |
| To | (Required) The name of the position or participant to whom the credit should be transferred. |
| Period | Choose the payout period for the credit to transfer. If you do not specify a period, the transferred credit is assigned the same period as the source credit. |
| Credit Type | (Required) Select a credit type to indicate the type for the transfer. The default credit types are commission, quota, order, and revenue, but additional credit types can be created. See the Commissions Administrator Help for information on creating custom credit types. |
| Reason Code | A code that indicates the reason for the transfer. Reason codes must be created by your Commissions Administrator Help. See the Commissions Administrator Help for more information on reason codes. |

| Operator | Description |
|-----------|---|
| Rollable | Check the box to specify that the credit can be rolled to another position assignment. |
| Roll Date | If you specify Rollable, select the date to roll the credit. |
| Comment | Enter text that describes the credit transfer. Comments are retained on both the newly created credit record and the original credit. |

1. (Optional) Click *Preview*. The Preview Transfer dialog displays the original payee, transfer to payee, and transfer value.
If the amount is correct, click *Accept* then proceed to Step 9.
2. Click *OK* in the *Adjust* dialog.
3. Click *Save*.

SAP Commissions saves the transferred credit to the *Credits* workspace.

21.4.4 Modifying a Credit

When you modify a credit, you change the record of the existing credit. The fields you can modify are limited based whether the credit was calculated, imported, or manually entered. See the Commissions Administrator Help for information on configuring preferences.

i Note

When you modify the credit, Commissions updates the Commissions. However, Commissions does not process the credit until the next time you run the calculation

To modify a credit:

1. Click *Credits* from the *Results* tab.
2. Search for the credit to be modified.
3. Select the credit in the *Summary* pane.
 - You can modify field information as noted in the following table in the detail panel.
Available fields are:

| Field | Description |
|-------|--|
| Name | A unique name for the credit. Only editable for manual and imported credits. |

| Field | Description |
|--------------|---|
| Credit Type | Indicates the source of the credit. The default credit types are commission, quota, order, and revenue, but additional credit types can be created. Only editable for manual and imported credits. See the Commissions Administrator Help for information on creating custom credit types. |
| Ever Held | Indicates whether the credit should be held and works in conjunction with the Release Date. This option can be modified for imported and manual credits, but not calculated credits. |
| Release Date | If Ever Held is enabled, you can specify a release date by entering a date or selecting a date using the Calendar field button. If the credit should be held indefinitely, leave release date blank. The release date is set to End Of Time. |
| Is Rollable | Indicates that the credit can be rolled to another position assignment. This field is editable for manual and imported credits, but is read only for calculated credits. |
| Roll Date | If Is Rollable Credit is enable, this is the date Commissions uses to look up roll relationships in the relationships hierarchy. This is usually the compensation date of the associated transaction. |
| Comments | (Optional) Comments about the credit. |
| Reason Code | (Optional) A code that indicates the reason for the credit. Reason codes must be created by your Commissions Administrator. See the Commissions Administrator Help for information on reason codes. |

- If your Commissions Administrator has enabled custom attributes for credits, the *Custom attributes* sections is visible in general information tab to edit values in those fields.

4. Click **Save**. Commissions saves the changes to the Commissions

21.4.5 Adjusting Credits

When you adjust credits, Commissions creates an adjustment entry in Commissions. If you make more than one adjustment to a credit, a separate record is created for each adjustment and Commissions updates the credit value accordingly.

Note: When you adjust the credit, Commissions updates the Commissions. However, Commissions does not process the adjusted credit until the next time you run the calculation.

If you are adjusting a calculated credit and Custom Processing Dates are enabled for the position that the credit is to be applied to, the Compensation Date is compared to the Processing End Date for the Position when you save the adjustment. In most instances, you cannot save a credit adjustment if the Processing End Date is less than or equal to Compensation Date. However, if there is an indefinite hold on the credit, the Compensation Date is set internally to End of Time and the credit can be saved regardless of Custom Processing Dates for the position.

To adjust a credit:

1. Click *Credits* from the *Calculation* tab.
2. Search for the credit or credits to be adjusted.
3. Select the credit or credits in the *Summary* panel.
4. Click *Credit* if required.
5. Click *Adjust* next to the *Value* field in the detail panel. This displays the **Adjust** dialog.
6. Perform the following in the *Adjust* dialog:
 - Specify one of the following adjustment options:
 - Adjust by - adjusts the credit value by a percentage or a specific value amount depending on the unit type specified. To specify a unit type, click the Unit Type field button.
7. Enter a negative number to decrease a credits' value.
8. Enter a positive number to increase the credit's value.
 - Adjust to - adjusts the credit to an amount. To specify a unit type other than the one assigned to the original credit, click the Unit Type field button.
 - Reset - to change the adjusted value back to the original value.

i Note

If you adjust a credit more than once, be sure that all adjustments use the same method (such as by value or by percentage, not both). Otherwise, Commissions uses only the last adjustment type. For example, if you adjust a \$100 credit by \$50 (adjusted credit value = \$150) and then adjust the credit by 10% (theoretically, the adjusted credit value is \$165), Commissions would process the credit during the next calculation using only the last adjustment method (the 10% adjustment, adjusted credit value = \$110)

- (Optional) If your Commissions Administrator has created reason codes, you can select a code that indicates the reason for the credit.

See the Commissions Administrator Help for more information about reason codes.

- (Optional) Enter text that describes the credit adjustment.

9. Click *Cancel* in to close the *Adjust* dialog.
10. Click *Adjust* to save the adjusted credit

Commissions records the adjustment. The adjustment is processed in the next calculation run for the period in which the credit's compensation date occurs.

21.4.6 Copying Credits

You can copy transaction-level credits shown in the summary pane and change any of the detail information about the copy. Most commonly, you change the participant to whom the credit applies. You cannot copy

order-level credits. An order-level credit is a credit that is generated by a credit rule that has a source of order. Copying a credit causes the transaction associated with the new credit to be considered as runnable. When you copy credits, the Commissions is updated immediately. However, the copied credit is not processed until the next time you run the calculation.

To copy a credit:

1. Click *Credits* from the *Results* tab.
2. Search for the credit to be copied.
3. Select *Credit* in the *Summary* panel.
4. Click *Copy* in the *Action* panel.
 - Commissions copies the selected credit and then inserts it at the bottom.
5. Edit the specific fields in the detail panel to change details for the copied credit. For example, to copy the credit to a different position, edit the *Position* field.
6. Click *Save*.

21.4.7 Setting a Credit's Release Date

You can manually set the release date of a held credit. You can set or change the release date of a held credit regardless of whether it is a calculated, an imported, or a manual credit. You can either indicate a specific release date, or choose to have the credit held indefinitely. The credit is processed in the period of the release date. To hold a credit indefinitely, do not specify a release date. SAP Commissions considers the credit compensation date to be the End Of Time. You can also specify a release date in the credit rule that generates the credit.

i Note

The calculation generates an error when it goes to process a released credit for a position or payee that is not effective at the time that the credit is being released.

An item that is held with an offset has a release date of the end date of the applicable, offset period.

i Note

For Administrators: credits that are held continue to have *isHeld=1* after processing. The *isHeld* attribute (the Ever Held field) indicates if the credit has been held at any point in time and if the hold is still valid, even if the hold is not still effective (the release date is in the past).

To set the release date of a held credit:

1. Click *Credit* from the *Calculation* tab.
2. Search for the credits to be released.
3. Select *Credit* in the *Summary* panel.
4. Select the *Credits* tab.
5. Perform the following in the release date field next to the ever held option:
 - To hold the credit until a specific date, enter a date or click the *Calendar* field button to select a date.
 - To hold the credit indefinitely, leave the release date field blank. The credit compensation date is set to End Of Time.
6. Click *Save*.

21.4.8 Setting a Credit's Release Date

You can manually set the release date of a held credit. You can set or change the release date of a held credit regardless of whether it is a calculated, an imported, or a manual credit. You can either indicate a specific release date, or choose to have the credit held indefinitely. The credit is processed in the period of the release date. To hold a credit indefinitely, do not specify a release date. SAP Commissions considers the credit compensation date to be the End Of Time. You can also specify a release date in the credit rule that generates the credit.

i Note

The calculation generates an error when it goes to process a released credit for a position or payee that is not effective at the time that the credit is being released.

An item that is held with an offset has a release date of the end date of the applicable, offset period.

i Note

For Administrators: credits that are held continue to have `isHeld=1` after processing. The `isHeld` attribute (the Ever Held field) indicates if the credit has been held at any point in time and if the hold is still valid, even if the hold is not still effective (the release date is in the past).

To set the release date of a held credit:

1. Click [Credit](#) from the [Calculation](#) tab.
2. Search for the credits to be released.
3. select the [Credit](#) from the [Summary](#) panel.
4. Select the [Credits](#) tab if required.
5. Perform one of the following in the release date field next to the [Ever Held](#) option:
 - To hold the credit until a specific date, enter a date or click the [Calendar](#) field button to select a date.
 - To hold the credit indefinitely, leave the release date field blank. The credit compensation date is set to End Of Time.
6. Click [Save](#). Commissions saves the date to the Commissions.

21.4.9 Finding Objects Related to Credits

You can find data related to one or more credits by selecting the appropriate object option from the [Related](#) pane. The available options and the data returned are as follows:

- **Rules**—returns the rules referred to by the credit.
- **Positions**—returns the positions referred to by the selected credit.
- **Participants**—returns the participants referred to by the selected credit.
- **Orders**—returns the orders referred to by the selected credit.
- **Transactions**—returns the transactions referred to by the selected credit.
- **Source Credits**—returns the credits that generated the selected credit.
- **Target Credits**—returns the credits generated by the selected credit.
- **Commissions**—returns the commissions generated by the selected credit.

- **Measurements**—returns the measurements generated by the selected credit.

To find objects related to credits:

1. Click *Credits* from the *Results* tab.
 2. Search for the credit or credits for which you want to find related objects.
 3. Select the credit or credits in the *Summary* panel.
 4. Select an object option in the *Related* panel, for example, Orders.
- If you are searching for related rules, the results are immediately retrieved and displayed in the Rules workspace. If no results are found, the message *No results found* is displayed.
 - If you are searching for an object other than rules, the *Search For Related Objects* dialog displays with the name of the selected object substituted for the object name.

21.5 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.

Related Information

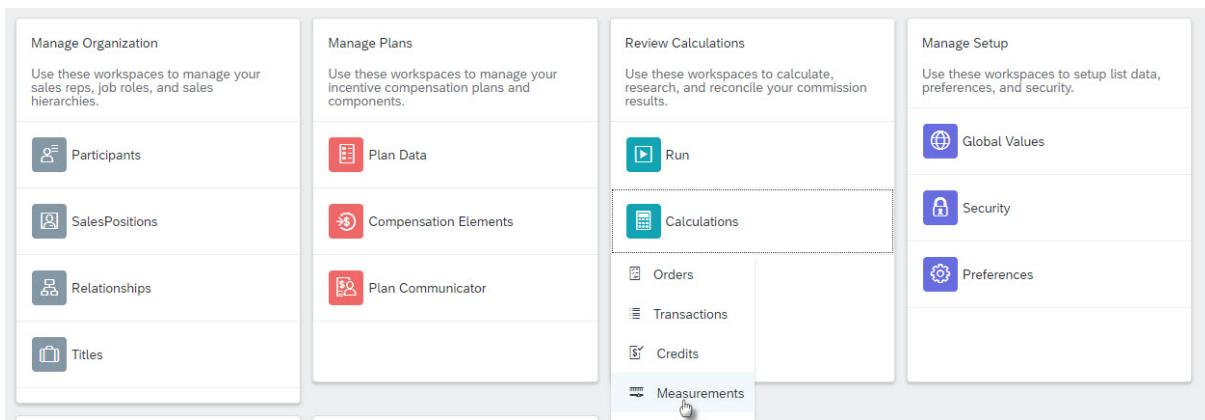
- [Measurements Workspace \[page 326\]](#)
- [Finding Objects Related to Measurements \[page 327\]](#)

21.5.1 Measurements Workspace

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

Measurement Tab

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



See the Commissions Administrator Help for information on preferences.

21.5.2 Finding Objects Related to Measurements

You can find data related to one or more measurements by selecting the appropriate object option from the *Related* pane. The available options and the data returned are as follows:

- **Positions**—returns the positions referred to by the measurement.
- **Participants**—returns the participants referred to by the measurement.
- **Credits**—returns the credits that generated the measurement.
- **Incentives**—returns the incentives generated by the measurement.
- **Commissions**—returns the commissions generated by the measurement.
- **Deposits**—returns the deposits generated by the Measurements.
- **Source Measurements**—returns the measurements that generated the selected measurement.
- **Target Measurements**—returns the measurements generated by the selected measurement.
- **Rules**—returns the rules referred to by the measurement.

To find objects related to measurements:

1. Click *Measurements* from the *Calculaion* tab.
 2. Search for the measurement or measurements for which you want to find related objects.
 3. Select the measurement or measurements in the *Summary* panel.
 4. Select an object option in the *Related* panel, for example, *Credits*.
- If you are searching for related rules, the results are immediately retrieved and displayed in the *Rules* workspace. If no results are found, the message “No results found” is displayed. Rule searches use NamedQuery and don’t display a *Simple Search* dialog, which is why the Note above was added. All other objects use LegalMoveDynamicQuery, which brings up the *Simple Search* dialog
 - If you are searching for an object other than rules, the *Search For Related Objects* dialog displays with the name of the selected object substituted for the object name.

21.6 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.

The input to each incentive rule is a measurement, another incentive, or a formula. The output of an incentive rule is a named incentive of specific value. The incentive is available for deposit for a position assignment for a specified period. SAP Commissions compares performance measurements with targets for each position assignment assigned to a plan. In the Reward stage of the calculation, rate tables and other commission formulas are applied to the measurements. During this stage, Commissions uses incentive rules to calculate incentive earnings that correspond to the performance level achieved.

i Note

You can choose whether or not to include per-credit commission detail in your incentives. If you choose to include this detail, calculation performance might be affected.

Related Articles

- [Incentives Workspace \[page 328\]](#)
- [Finding Objects Related to Incentives \[page 328\]](#)

21.6.1 Incentives Workspace

In the Incentives workspace, you can view incentives and objects related to those incentives. If your Commissions Administrator has enabled custom attributes section then the custom attributes section is visible from general information tab for the incentives, a Custom tab is also displayed and you can enter and modify values for these attributes.

Incentive Tab

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.

See the Commissions Administrator Help for information on preferences.

21.6.2 Finding Objects Related to Incentives

You can find data related to one or more incentives by selecting the appropriate object option from the Related pane. The available options and the data returned are as follows:

- **Positions**—returns the positions referred to by the selected incentive.

- **Participants**—returns the participants referred to by the selected incentive.
- **Commissions**—returns the commissions that generated the selected Incentive.
- **Measurements**—returns the measurements that generated the selected incentive.
- **Deposits**—returns the deposits generated by the selected incentive.
- **Source Incentives**—returns the incentives that generated the selected incentive.
- **Target Incentives**—returns the incentives generated by the selected incentive.
- **Rules**—returns the rules referred to by the selected incentive.

To find objects related to incentives:

1. Click *Incentives* the *Calculation* tab.
 2. Search for the incentive or incentives for which to find related data.
 3. Select the incentive or incentives for which you want to find related objects.
 4. Select an object option n the **Related** panel, for example, Commissions.
- If you are searching for related rules, the results are immediately retrieved and displayed in the Rules workspace. If no results are found, the message “No results found” is displayed. Rule searches use NamedQuery and don't display a Simple Search dialog, which is why the Note above was added. All other objects use LegalMoveDynamicQuery, which brings up the Simple Search dialog.
 - If you are searching for an object other than rules, the Search For Related Objects dialog displays with the name of the selected object substituted for the object name.

21.7 Commissions Overview

A commission is a kind of incentive award that is based on credited transactions or other measurement values, and is usually proportional to the value of the measurement. Commission rules determine commission values.

i Note

The output of a commission rule is commission objects and an incentive object; the incentive object is the aggregate value of all commissions generated by the rule.

21.7.1 Commissions Workspace

After you run the calculation, Commissions displays the output of all commission rules in the *Commissions* workspace. The *Commissions* workspace is used for research and reporting purposes only.

See the Commissions Administrator Help for information on configuring preferences.

21.7.2 Finding Objects Related to Commissions

You can find data related to one or more commissions by selecting the appropriate object option from the Related pane. The available options and the data returned are as follows:

- **Positions**—returns the position referred to by the selected commission.
- **Participants**—returns the participant referred to by the selected commission.
- **Credits**—returns the credits that generated the selected commission.
- **Measurements**—returns the measurements that generated the selected commission.
- **Incentives**—returns the incentives generated by the selected commission.
- **Deposits**—returns the deposits generated by the selected commission.
- **Transactions**—returns the transactions generated by the selected commission.
- **Titles**—returns the titles generated by the selected commission.
- **Rules**—returns the rules referred to by the selected commission

To find objects related to commissions:

1. Click *Commissions* from the *Calculation* tab.
 2. Search for a commission or commission for which you want to find related data.
 3. Select commission or commissions In the *Summary* panel.
 4. Select an object option, such as Credits in the *Related* panel.
- If you are searching for related rules, the results are immediately retrieved and displayed in the *Rules* workspace. If no results are found, the message “No results found is displayed. If you are searching for an object other than rules, the *Search For Related Object* dialog displays with the name of the selected object substituted for the object name.

21.8 About Deposits

Deposits are generated by deposit rules, or they can be imported, or they can be manually entered. Deposit rules determine how much of each kind of incentive compensation a position assignment has earned and when the compensation can be paid. Deposits can also be imported.

Related Articles

- [Deposits Workspace \[page 330\]](#)
- [Adjusting Deposits \[page 331\]](#)
- [Modifying a Deposit \[page 332\]](#)

21.8.1 Deposits 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.

Deposit Tab

From the Deposit tab you can enter and modify deposit information, adjust deposits, and view deposit information for a deposit or deposits selected in the summary pane.

See the Commissions Administrator Help for information on preferences.

Adjustments Tab

The *Adjustments* tab displays adjustments that have been made to a selected deposit. For example, if the adjustment was an adjustment to a specific value, SAP Commissions displays *adjust to* in the *Adjustment Type* column in the detail pane (If the *Adjustment Type* column is not displayed, use the scroll bar in the detail pane.) If the adjustment was by a percentage or value, Commissions displays *adjust By*.

The screenshot shows a user interface for managing deposits. At the top, there's a header 'Deposit Details' with edit and list icons. Below it, a navigation bar has 'General Information' and 'Adjustments' tabs, with 'Adjustments' being active. A main table below the navigation bar has columns for 'Name', 'Period', 'Position', 'Participant', and 'Create Date'. At the bottom of the table area is a horizontal scroll bar.

21.8.2 Adjusting Deposits

When you adjust deposits, SAP Commissions creates an adjustment entry in the SAP Commissions. If you make more than one adjustment to a deposit, a separate record is created for each adjustment and Commissions updates the deposit value accordingly. Adjusted deposits can be viewed from the *Adjustment* tab of the *Deposits* workspace.

To adjust deposits:

1. Click *Deposits* the *Calculation* tab.
2. Search for the deposit or deposits to be adjusted.
3. Select the deposit or deposits in the *Summary* panel.
4. Click the *Deposit* tab.
5. Click *Adjust* located next to the *Value* field in the detail panel. The *Adjust* dialog displays.
6. Perform the following In the *Adjust* dialog:
 - Specify one of the following adjustment options:
 - Adjust by - adjusts the deposit value by a percentage or a specific value amount depending on the unit type specified. To specify a unit type, click the Unit Type field button. To decrease a deposit's value, enter a negative number. To increase the deposit's value, enter a positive number.

- Adjust to - adjusts the deposit to an amount. To specify a value unit type other than the one assigned to the original deposit, click the Unit Type field button.
 - Reset - to change the adjusted value back to the original value.
 - If your Commissions administrator has created reason codes, you can select a code that indicates the reason for the adjustment.
 - See the Commissions Administrator Help for more information on reason codes.
 - (Optional) Enter text that describes the adjustment.
7. Click *Cancel* to close the *Adjust* dialog.
8. Click *Adjust* to save the adjusted deposit.

Commissions records the adjustment. The adjustment is processed in the next calculation run for the period in which the deposit occurs.

21.8.3 Modifying a Deposit

You can make various changes to the deposit details in the detail pane. If you modify a deposit, calculation reapplies the adjustment to the calculated deposit.

To modify a deposit:

1. Click *Deposits* to go to the *Deposits* workspace from the *Calculation* tab.
2. Search for the deposit or deposits to be modified if necessary.
3. Select the deposit or deposits in the *Summary* panel.
4. Click the *General Information* tab if necessary.
5. You can modify field values as noted in the following table in the *Details* pane.

| Field | Description |
|---------------|---|
| Period | The period that contains the deposit and the calendar within that period. Only editable for manual and imported deposits |
| Name | A unique name for the deposit. Only editable for manual and imported deposits. |
| Earning Group | <p>Groups similar types of deposits. Positive and negative balances within an earning group are offset against each other. Earning groups can be entered using the following methods:</p> <ul style="list-style-type: none"> ○ Type a text string into the field. For example, enter "r;special incentives" to dynamically create a special incentives earning group. Earning groups entered by this method are not available to deposit rules or other deposits. ○ Select an earning group from the drop-down list. Earning groups can be created in the Earning Groups workspace. Earning groups added in the Earning Groups workspace are available for all deposit rules and deposits. See the Commissions Administrator Help for more information. |
| Earning Code | A code that differentiates deposits within an earning group. These codes help external accounting systems track departmental earnings. Earning codes can be entered using the same methods as earning groups. |

| Field | Description |
|--------------|---|
| Deposit Date | (Optional) The date the deposit was created. For calculated deposits, this is the calculation run date. |
| Ever Held | When enabled, that the deposit is to be held and works in conjunction with the Release Date. Note: If you modify the Ever Held option and Release Date for a deposit related to a posted payment, you must rerun the calculation for the period to generate a negative applied deposit (earnings) so that the payment is not made twice. |
| Release Date | If Ever Held is enabled, a date in this field indicates when the deposit should be released. If Ever Held is enabled and the Release Date is blank, the deposit is held indefinitely. |
| Reason Code | A code that indicates the reason for the deposit. Reason codes must be created by your Commissions Administrator. See the Commissions Administrator Help for more information on reason codes. |
| Comments | A description or comments about the deposit. |

6. Click [Save](#).

21.8.3.1 Holding a Deposit

Deposits can be held until a specific date or indefinitely.

To hold a deposit:

1. From the CALCULATION tab, click Deposits to go to the Deposits workspace.
2. If necessary, search for the deposit or deposits to be placed on hold.
3. In the summary pane, select the deposit or deposits.
4. If necessary, click the general information tab.
5. In the detail pane, enable the Ever Held option.
 - To hold the deposit until a specific date, enter a date or click the Calendar field button to select a date.
 - To hold the deposit indefinitely, leave the release date field blank.
 - In the date field next to the Ever Held option, do one of the following:
1. Click Save.

i Note

If you modify the Ever Held option and Release Date for a deposit related to a posted payment, you must rerun the calculation for the period to generate a negative applied deposit (earnings) so that the payment is not made twice.

21.8.3.2 Creating a Manual Deposit

You can award a deposit to a position assignment where the deposit is not directly related to the standard rule processing. After creating a manual deposit, Commissions processes the manual deposit the next time that you run the calculation. Also, manual deposits are not reset during calculation processing. If Custom Processing Dates are enabled, at least one day of the Period specified for the deposit must be within the Is Processing start and end dates for the current version of the position. For example, if the Is Processing effective dates are February 2008 to June 2008, the Period for the deposit cannot be January 2008. If you award a manual deposit to a position assignment and the version of the position changes (such as for a change in payee), you must delete the old manual deposit and create a new one for the new position version.

To create a manual deposit:

1. Click *Deposits* from the *Calculation* tab.
2. Click *Add (new)*.
3. Click the *General Information* tab.
 - If the deposit should exist within a period and effective dates other than the default, select the appropriate calendar and period.

i Note

You must create the deposit to be effective during the time when the position assignment (position / payee combination) is also effective. Commissions does not allow you to create a manual deposit for a time period when the specified position assignment is not effective.

4. Enter the remaining values for the deposit. The fields in a deposit are:

| Field Name | Description |
|---------------|--|
| Name | (Required) A unique name for the deposit. |
| Position | (Required) The name of the position associated with the deposit. |
| Title | (Read only) The title associated with the position. |
| Create Date | For manual deposits, defaults to the current date and is not editable. |
| Origin Type | Defaults to Manual, Calculated, or Imported depending how the deposit was created. This field is not editable. |
| Earning Group | Groups similar types of deposits. Positive and negative balances within an earning group are offset against each other. Earning groups can be entered using the following methods: <ul style="list-style-type: none">○ Type a text string into the field. For example, enter "r;special incentives" to dynamically create a special incentives earning group. Earning groups entered by this method are not available to deposit rules and other deposits.○ Select an earning group from the drop-down list. Earning groups can be created in the Earning Groups workspace. Earning groups added in the Earning Groups workspace are available for all deposit rules and other deposits. See the Commissions Administrator Help for more information. |

| Field Name | Description |
|-------------------|---|
| Earning Code | A code that differentiates deposits within an earning group. Earning codes help external accounting systems track departmental earnings. Earning codes can be entered using the same methods as earning groups. |
| Rule | For calculated deposits, this field displays the deposit rule that generated this deposit. This field is not applicable to manually created deposits. |
| Preadjusted Value | (Read only) The deposit's value before any applicable adjustments or modifications. When creating a manual deposit, the Preadjusted Value and Value are the same and entering the Value updates this field. |
| Value | (Required) The value of the deposit. Click the Unit Type field button to select a unit type. The options are currency, percent, quantity, and integer. See the Commissions Administrator Help for more information on unit types. |
| Deposit Date | You can specify any date in this field. |
| Ever Held | Indicates that the deposit is to be held and works in conjunction with the Release Date. |
| Release Date | If Ever Held is enabled, a date in this field indicates when the deposit should be released. If Ever Held is enabled and the Release Date is blank, the deposit is held indefinitely. |
| Reason | A code that indicates the reason for the deposit. Reason codes must be created by your Commissions Administrator. See the Commissions Administrator Help for more information on reason codes. |
| Comments | Enter a description or comments about the deposit. |
| Business Units | (Read only) Commissions automatically sets the business unit on the deposit to match the business unit assignment on the position. See the Commissions Administrator Help for more information. |

- Click **Save**. Commissions saves the deposit to the Commissions.

21.8.3.3 Setting a Deposit's Release Date

You can manually set the release date of a held deposit. You can set or change the release date of a deposit regardless of whether it is a calculated, an imported, or a manual deposit. You can either indicate a specific releasedate, or choose to have the deposit held indefinitely. The calculation processes all deposits released within the period.

i Note

The calculation generates an error when it goes to process a released deposit for a position or payee that is not effective at the time that the deposit is being released.

To set the release date of a held deposit:

1. Click *Deposits* from the *Calculation* tab.
2. Search for the deposit or deposits to set a release date for.
3. Select the deposit or deposits that you want to set a release date for in the **Summary** panel.
4. Click the *General Information* tab.
5. Perform the following in the date field next to the Ever Held option:
 - To hold the deposit until a specific date, enter a date or click the Calendar field button to select a date.
 - To hold the deposit indefinitely, leave the release date field blank.
6. Click *Save*. Commissions saves the new information to the Commissions.

21.8.3.4 Finding Objects Related to Deposits

You can find data related to one or more deposits by selecting the appropriate object option from the Related pane. The available options and the data returned are as follows:

- **Positions**—returns the positions referred to by the selected deposit.
- **Participants**—returns the participants referred to by the selected deposit.
- **Rules**—returns the rules referred to by the selected deposit.
- **Measurements**—returns the measurements that generated the selected deposit.
- **Commissions**—returns the commissions that generated the selected deposit.
- **Incentives**—returns the incentives that generated the selected deposit.
- **Payments**—returns the payments generated by the selected deposit.
- **Titles** —returns the titles generated by the selected deposit.

To find objects related to deposits:

1. Click *Deposits* from the *Calculation* tab.
 2. Search for the deposit or deposits for which to find related objects.
 3. Select the deposit or deposits in the *Summary* panel.
 4. Select an object option in the *Related* panel, for example, *Position*.
- If you are searching for related rules or payments, the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message “No records found” message is displayed in summary view panel. In case, you are searching for an object other than rules or payments, the Search For Related Objects dialog displays with the name of the selected object substituted for the object name.

22 Payments and Balances Overview

Payments represent the incremental deposit amount to be paid for a specified fiscal period. Balances are payment amounts generated for finalized periods. Payments are always generated per position assignment within an earning group except when the *Consolidate Payee Payments* preference is enabled. When this preference is enabled, payments are generated per payee regardless of the position that the payee is assigned to.

22.1 Payments Workspace

The *Payments* workspace displays a summary of all the payments and balances calculated by SAP Commissions for position assignments when you ran the calculation. In the *Summary* view of the *Payments* workspace, SAP Commissions lists an aggregate payment summary item for each position assignment, period, earning group, unit type, and business unit combination.

General Information Tab

The following figure shows the *General Information* tab. From this tab, you can view the individual payment and balance items that make up the payment summary item and view additional information about each of these items. For each payment or balance item, SAP Commissions lists the earnings that constituted the payment or balance object. Information on the tab includes:

- Payment summary item: An aggregate value of all payments for a position assignment period, earning group, unit type, and business unit. The unit type used and displayed is derived from the source deposit.
- The first line or lines for a payment or balance item lists the earnings calculated.
- The last line for a payment or balance item lists the payment or balance generated.

You can click and drag the column boundaries to customize the display.

The screenshot shows the SAP Commissions Payments workspace. At the top, there is a header bar with various icons. Below the header is a table titled "Payment Summary (1)". The table has columns for Participant, Earning Group, Period, Prior Balance, Earning, Payment, Balance, and Business Unit. One row is visible, showing "First 0827" as the participant, "Commission" as the earning group, "January 2006" as the period, "\$10,000.000" as the prior balance, "\$10,000.000" as the earning, "\$10,000.000" as the payment, and an empty field for balance. Below the table, there is a section titled "Payment Details" with tabs for "General Information" (which is selected) and "Supporting Details". Under "General Information", there is a note: "First 0827 will be paid \$10,000.000 for January 2006". Below this note, there is a table titled "Commission" with rows for "N/A", "\$10,000.000", and "N/A". To the right of this table is a "Details Table" with the instruction "Click on the highlighted numbers on the left for additional details".

The details for each line item on the *General Information* tab includes information for:

- Description—Lists the period description. For the last line for the earnings item, Payment or Balance is shown to indicate the type of object.
- Earning Code—Displays the earning code for the payment or balance.
- Value—Displays the value for the payment or balance.
- Posted Date—Lists the date of the calculation run that posted the object. If an item is not posted, it is in trial status.
- Finalized—Indicates a Yes if the position is finalized for the specified period, or if the period itself is finalized.

i Note

A zero value payment is a valid payment, and gets created and posted just as any other payment does.

See the Commissions Administrator Help for information on configuring preferences and for information. Here is an example of what a participant's payment summary looks like in the Week 6 2015(February 2015) period, after Compensate and Pay stages have been run. The participant has some trial payments and a couple of prior period balances.

| Payment Summary (1) | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|------------------------------------|--------------|---------------|--------------|--------------|---------|---------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| | Participant | Earning Group | Period | Prior Balance | Earning | Payment | Balance | Business Unit | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | First 0827 | Commission | January 2006 | | \$10,000.000 | \$10,000.000 | | | | | | | | | | | | | | | | | | | | |
| Show 10 entries | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Payment Details | | | | | | | | | | | | | | | | | | | | | | | | | | |
| General Information | | Supporting Details | | | | | | | | | | | | | | | | | | | | | | | | |
| First 0827 will be paid \$10,000.000 for January 2006 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Commission | | | | | | | | | | | | | | | | | | | | | | | | | | |
| N/A | was applied prior balance | | | | | | | | | | | | | | | | | | | | | | | | | |
| \$10,000.000 | was earned in January 2006 | | | | | | | | | | | | | | | | | | | | | | | | | |
| N/A | will be carried over from January 2006 to future periods | | | | | | | | | | | | | | | | | | | | | | | | | |
| N/A | is total outstanding balance as of January 2006 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Details Table | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Click on the highlighted numbers on the left for additional details | | | | | | | | | | | | | | | | | | | | | | | | | | |

The figure shows that:

- Payments are calculated for February 2015, but they have not yet been posted. Because the payments are in trial status, the balances included in these payments are not yet marked applied.
- A balance was generated and posted in November 2015 (a finalized period).

i Note

You can determine when payment summaries should be generated by setting one or more of the following Generate Payment Summaries calculation preferences: After Calculating Payments, After Posting Payments, After Finalizing Payments. See the Commissions Administrator Help for information on configuring preferences.

After running the calculation Post-stage, the payments are now posted, and the prior period balances are marked as applied. The figure shows that:

- Payments are calculated and posted for November 2015. Because the payments are posted, the prior period balances included in those payments are now marked applied.

- A balance was generated and posted in November 2015 (a finalized period).

After posting payments in the December 2007 period, the November 2015 payment summary displays the posted and applied status of the balances brought forward into the December payments.

| Payment Details | | Details Table |
|---|--|---------------|
| General Information | Supporting Details | |
| First 0827 will be paid \$10,000.000 for January 2006 | | |
| Commission | | |
| N/A | was applied prior balance | |
| \$10,000.000 | was earned in January 2006 | |
| N/A | will be carried over from January 2006 to future periods | |
| N/A | is total outstanding balance as of January 2006 | |

The figure shows that:

- After posting payments in December 2007, the November balances show as applied when looking at the November 2007 payment detail.

Supporting Details Tab

The following figure shows the *Supporting Details* tab. To see each type of result data, select the corresponding check box in the *Show* area.

| Payment Details | | Supporting Details | | |
|-----------------------|--|--------------------|-------------|--|
| Item | | Amount | Create Date | Description |
| ▼ Payment Summary | | | | First 0827 - January 2006 - Commission |
| ▼ Payment | | \$10,000.000 | 9/17/2018 | Navin_ECD1 |
| ▼ Earning | | \$10,000.000 | 9/17/2018 | Navin_ECD1 |
| ▼ My1:Deposit | | \$10,000.000 | 9/17/2018 | DR_Monthly Commissions Output |
| ▼ Incentive | | \$10,000.000 | 9/17/2018 | Variable rule |
| ► Primary Measurement | | \$100.00 | 9/20/2018 | MR |

Additionally, if you change a field on a transaction that does not affect the value when viewing the transaction in the detail pane of the *Supporting Details* tab, Commissions displays "r;not a value adjustment" to help clarify the kind of adjustment.

22.2 Negative Payments

You can configure SAP Commissions to store payments that are negative amount using the *Allow Negative Payments preference*. A negative payment might occur, for example, if a participant has a de-booking in a prior

period that results in a negative deposit balance that is larger than the payment for the current period. If SAP Commissions is not configured to allow negative payments, the payment is instead converted to a negative balance and is carried forward to subsequent periods until it is balanced against the positive deposits for a period. If you have not configured to allow negative payments and there is a negative balance from a previous period that is larger than the payment for the current period, then no payment is posted in the Post stage. In this case, in the Finalize stage Commissions generates the amount as an additional balance.

For example, if Tom Jones has a balance of -\$100 from January and his February earnings are \$75, the calculation would result in a payment of -\$25. However, because negative payments are not allowed, there is no payment. Instead, when the Finalize stage is run for the February period, Commissions generates a \$75 balance. (You would not see the prior period balance in the February period until after the balance has been applied.) The January balance is not applied until there are sufficient current period earnings to absorb the negative prior period balance.

i Note

You can do a search for balances from previous periods to find the prior period negative balance(s).

Earning Groups and Codes in the Pay Stage

In general, SAP Commissions generates a separate payment for each unique combination of an earning group and earning code. Sometimes, some balancing is necessary across earning codes. SAP Commissions attempts to balance any negative payments within each earning group. Within each earning group, you can define a set of earning codes. For example, for a Commission earning group, you can create an earning code for Sales Revenue Commission, and one for Sales Booked Revenue Incentive. Each deposit originating from the sale of one of these products is tagged with the appropriate earning code by the deposit rule in the Reward stage. Payments derived from these deposits are also tagged with the earning code. For example, the result at the end of the Pay stage might be a \$200 payment to John Jones for his sales of Sales Revenue Commission, and a \$100 payment for his sales of Sales Booked Revenue Incentive.

However, under certain circumstances, a payment labeled with an earning code might not reflect the amount of deposits for that earning code. John Jones might have sold enough Sales Booked Revenue Incentive that he expects a payment of \$500, yet only receives \$300. If this occurs, it could be the result of balancing payments across earning codes, which occurs in the Pay stage of the calculation.

Finding Objects Related to Payments

You can find data related to one or more payments by selecting the appropriate object option from the Related pane. The available options and the data returned are as follows:

Participants—returns the participants referred to by the selected payment

Positions—returns the positions referred to by the selected payment

Deposits—returns the deposits referred to by the selected payment

To find objects related to payments:

1. Click *Payments* from the *Calculation* menu.
2. Search for the payment or payments for which you want to find related data.
3. Select an object option, for example, Deposits in the *Related* panel.

If you are searching for related deposits, the objects are retrieved immediately and the results are displayed in the related workspace. If no results are found, the message "No Records Found" message is displayed in Summary view panel. Deposit searches use NamedQuery and don't display a *Simple Search* dialog, which is why the Note above was added. All other objects use LegalMoveDynamicQuery, which brings up the Simple Search dialog.

If you are searching for related participants or positions, the *Search For Related Object* dialog displays with the name of the selected object substituted for the object name.

22.3 Grouping and Balancing Overview

Earning groups and earning codes are used to group deposits, earnings, and payments. You use earning groups to differentiate these items for the purpose of balancing certain groups of deposits during calculation processing. You use earning codes as a more granular level within earning groups to label deposits for accounting purposes (tracking of deposits by an external system). Before you create deposit rules, consider how you need to handle balances. For example, if you have a separate commission and bonus incentive rules, do you need output from these rules to be balanced together or separately in your deposit rules for the same plan? If you need to balance the output separately, create earning groups; if you need to differentiate between types of commissions, you could create earning codes. Create earning groups and earning codes in Commissions first, then create the appropriate deposit rules.

If you are using different unit types for multiple currencies, such as one for US dollars and another for Euros, grouping by unit type as well as by earning group and earning code is also done.

Related Articles

- [Earning Groups \[page 341\]](#)
- [Earning Code \[page 342\]](#)
- [Multiple Currencies \[page 342\]](#)

22.3.1 Earning Groups

When you create a deposit rule, you can assign the deposits it creates to different earning groups. Deposits assigned to different earning groups are balanced separately (earning groups are also used for reporting purposes). You might choose to do this, for example, if you need to balance commissions against commissions, and bonuses against bonuses. If your business does not require the separation of deposits by earning groups, assign all deposits to a single earning group. See the Commissions Administrator Help for more information on earning groups.

You create an earning group by simply assigning it an identifying name and a description. The name is then available from the *Rules* workspace when you create a Deposit rule. You can specify that the deposits that it creates are assigned to an earning group. The following figure shows a conceptual view of when earning groups are used during calculation processing. During the Reward stage of the calculation, each deposit created by a

Deposit rule is tagged with the earning group specified by the rule. During the Pay stage, deposits are balanced to create one payment or balance for each earning group. Any balances carried forward from previous periods are also included in the payment.

22.3.2 Earning Codes

Earning codes are labels that you can apply to deposit earnings for use in tracking payments according to your business needs. The earning code totals are often exported to external accounting systems. When you create deposit rules, you can elect to label the incentives the rule creates with earning codes. For example, if a company needs to track all the commission earnings together, assign an earning code (for example, EC-1) to the Commission Earning Group. If the company also needs to track bonuses, such as trips, that are given as incentives, create an additional earning code (for example, EC-2) to apply to trip award bonuses. Each earning code is tracked separately in Commissions. See the Commissions Administrator Online Help for more information on earning codes.

22.3.3 Multiple Currencies

If you are using different unit types for multiple currencies, such as one for US dollars and another for Euros, grouping by unit type as well as by earning group and earning code is done. For example, consider the data in the following table.

Grouping by Multiple Currencies

| Payee | Earning Group | Earning Code | Unit Type | Amount |
|---------|---------------|--------------|-----------|----------------|
| Payee 1 | Bonus | Commission | USD | 1000 |
| Payee 1 | Bonus | MBO | USD | -200 (balance) |
| Payee 1 | Bonus | Bonus | Euro | -600 |

In this example, all the payments and balances are within the same earning group; however, the negative balance of -\$200 is offset against the \$1000 because they share the same unit type.

22.4 Earning Code Balancing

In some circumstances, a payment marked with an earning code within an earning group might not match the earnings calculated for that earning code/earning group combination. For example, a position could be awarded the following earnings items during the Pay stage, where earnings and payments are calculated. These are both within the Revenue earning group:

- Sales Revenue Commission: \$400

- Sales Booked Revenue Commission: \$100

If these are the only items going into a payment, the payee assigned to the position would receive a payment of \$500 associated with the Revenue earning group. However, under certain circumstances, a payment labeled with an earning code might not reflect the amount of deposits for that earning code. If this occurs, it might be the result of balancing payments across earning codes, which occurs in the Pay stage.

For example, the earnings generated for the Revenue earning group for the position might be \$500, but the payment is only \$300. Commissions balances earnings across earning codes only in the following circumstances:

- A trial payment is negative.
- Commissions is configured to not allow negative payments. (This is the default setting.)

If negative payments are allowed, then payments are recorded as is. There is no need to balance out a negative payment.

- The position is not finalized.

If the position is finalized, then the calculation does not calculate payments, only balances.

- The earning group has more than one earning code.

Within an earning group, if there are earnings for only one earning code and its payment is negative, it is handled the same as any negative payment (converted to a negative balance in the Finalize stage and used in calculations of payments for the earning group in subsequent periods). Consider the earlier example, but one of the earnings items is negative (this resulted from a de-booking in a previous period):

- Sales Revenue Commission earning code: \$400
- Sales Booked Revenue Commission earning code: -\$300

Rather than carry forward a negative balance for the Sales Booked Revenue Commission through to some future period when the payee generates enough revenue to offset it, the negative earnings from the one earning code is subtracted from the position earnings in the other earning code earnings within the same earning group. Commissions balances the -\$300 earnings with the \$400 earnings to generate a payment of \$100. This payment is marked with the Sales Revenue Commission earning code.

i Note

If there are no payments for the current period in a particular earning group, any negative balances from prior periods for that earning group continue to be carried forward.

Commissions balances earnings and prior period balances across earning codes as follows: Prior period balances are ordered by create date, with the earliest first. Current period earnings (applied deposits) are ordered by value, with the smallest first. The earliest negative balance is subtracted from the smallest earnings item. Any remainder is subtracted from the next smallest earnings, and so on. Negative payments and balances are calculated across all earning codes within an earning group. For example, suppose there are three earnings items with different earnings codes for a position assignment and for the Revenue earning group:

- Sales Revenue Commission earning code: -\$200 prior period balance (this is the earliest balance)
- Sales Booked Revenue Incentive earning code: -\$100 prior period balance
- Sales Management Total Revenue Bonus earning code: \$50 current period earnings

After running Compensate and Pay, the -\$100 balance from the prior period for the Sales Booked Revenue Incentive earning code remains as a balance. The balance of -\$200 for the Sales Revenue Commission also remains. After the period is finalized, the \$50 amount is created as a balance to be brought forward into the

next non-finalized period. No payment is generated because the total for the Revenue earning group is negative.

22.5 Consolidating Payee Payments Overview

If some participants in your organization are assigned to more than one position, you can configure Commissions to generate a single payment (or balance) for the participant by enabling the Consolidate Payee Payments preference. See the Commissions Administrator Help for more information on enabling preferences. If enabled, this feature generates a single payment for each earning group, earning code, unit type, and participant, regardless of the number of positions that the participant is assigned to. If this feature is not enabled, Commissions continues to generate a payment (or balance) for each participant, position, unit type, earning code, and earning group combination.

Related Information

- [Enabling Payee Payment Consolidation \[page 344\]](#)
- [About Payee Payment Consolidation \[page 345\]](#)

22.5.1 Enabling Payee Payment Consolidation

After you enable *Consolidate Payee Payments*, it is advised that you not disable it. If you must do so, disable it at the end of a period and after all balances have been reconciled. Be sure to note the following when enabling payee payment consolidation:

- When you run the calculation for a subset of positions, be sure to do so for all positions held by a participant. Otherwise, the calculation results data will be incorrect.
- Business unit security might be compromised in situations where a participant holds positions in separate business units within the same processing unit (if processing units are enabled). In such cases, a Commissions user might be able to view balances, deposits, and incentives related to a business unit other than the one they are assigned to.
- If a participant is assigned to more than one position and those positions are assigned to plans associated with different calendars, payee payments are not consolidated.
- When you enable payee payment consolidation, you do so for all positions in the system.
- If processing units are enabled, payment consolidation is limited to the confines of a processing unit. For example, if a participant is assigned to multiple positions and those positions are in different processing units, payment consolidation only occurs for the positions that are in the same processing unit.
- If payee payment consolidation is enabled, you cannot do a related search from positions to payments, or vice versa. You can search for related payments from participants.

22.5.2 About Payee Payment Consolidation

From the Participants workspace, you can select a participant and perform a related search to the positions that the participant is assigned. You can also directly view that participant's payments by selecting the participant and performing a related search to payments. In the Payments workspace, when you click the Supporting Details tab, Commissions displays the position information for each deposit. When you expand the payment details, you can see the results data from multiple positions.

Following are some example calculations, to show you how balancing works with multiple positions and Consolidate Payee Payments enabled. The following calculations start from the scenario where all periods prior to January are finalized, and negative payments are not allowed. The following table lists the results as you would see them in the Payments workspace, Supporting Details tab for the specified position in January. There are two balances brought over from the prior December period, one of -\$500 for the Commission earning group and another \$500 balance from the Bonus earning group.

Calculation Run#1: Compensate and Pay, January run

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|---|----------------------------------|--|---------|---|
| Commission | | -\$500 balance posted (unapplied) in December | -\$500 | \$350 - Position1 -\$850 - Position2 |
| If negative payments were allowed, there would be a trial payment in the amount of -\$400 for the Commission earning group. | | \$100 | \$100 | \$100 - Position1 |
| Bonus | | \$500 balance posted (unapplied) in December | \$500 | \$500 - Position2 |
| \$500 trial payment for January | | | | |
| Revenue | \$1000 trial payment for January | | \$1000 | \$1000 - Position1 |

Calculation Run #2: Compensate and Pay (re-run), January run

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|---------------|---------|--|---------|---|
| Commission | | -\$500 balance posted (unapplied) in December | -\$500 | \$350 - Position1 -\$850 - Position2 |

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|---|---------------------------------|--|---------------------------------------|--------------------|
| If negative payments were allowed, there would be a trial payment in the amount of -\$350 for the Commission earning group. | | \$150 | \$100 - Position1 \$50 - Position2 | |
| Bonus | | \$500 balance posted (unapplied) in December | \$500 | \$500 - Position2 |
| \$595 trial payment for January | | \$95 | \$25 - Position1 \$70 - Position2 | |
| Revenue | \$900 trial payment for January | | \$900 | \$900 - Position1 |

i Note

Underlined items indicate changes from the previous table.

The second calculation run is a re-run of Compensate and Pay, without Post. In this second calculation run of January, Commissions generates a new trial payment of \$595 for the Bonus earning group. The \$150 in Earnings generated for the participant for the Commission earning group is not created as a payment because the prior period balance is negative and larger than the current period earnings. The Revenue earning group's earnings changed to \$900 and generated a \$900 trial payment.

Calculation Run #3: Post stage, January run

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|---|---------|---|---------------------------------------|---|
| Commission | | -\$500 balance posted (unapplied) in December | -\$500 | \$350 - Position1 -\$850 - Position2 |
| If negative payments were allowed, there would be a trial payment in the amount of -\$350 for the Commission earning group. | | \$150 | \$100 - Position1 \$50 - Position2 | |
| Bonus | | \$500 balance posted (applied) in December | \$500 | \$500 - Position2 |

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|----------------------------------|----------------------------------|------------------------|--------------------------------------|--------------------|
| \$595 posted payment for January | | \$95 | \$25 - Position1 \$70 - Position2 | |
| Revenue | \$900 posted payment for January | | \$900 | \$900 - Position1 |

After running the Post stage, the trial status earnings and payments are marked as posted, except for the \$150 trial earnings for the Commission earning group. In the Commission earning group, because the prior period balance is negative and the earnings amount does not balance out the negative portion, no payment can be generated (the option to allow negative payments is not enabled). This earnings amount stays in trial status. Later, when the period is finalized, the earnings amount is created as a balance and is available for use in the next period.

Calculation Run #4: Compensate and Pay (re-run), January run

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|---|----------------------------------|---|---------------------------------------|---|
| Commission | | -\$500 balance posted (unapplied) in December | -\$500 | \$350 - Position1 -\$850 - Position2 |
| If negative payments were allowed, there would be a trial payment in the amount of -\$350 for the Commission earning group. | | \$150 | \$100 - Position1 \$50 - Position2 | |
| Bonus | | \$500 balance posted (applied) in December | \$500 | \$500 - Position2 |
| \$595 posted payment for January | | \$95 | \$25 - Position1 \$70 - Position2 | |
| Revenue | \$900 posted payment for January | | \$900 | \$900 - Position1 |
| \$90 trial payment for January | | \$90 | \$40 - Position1 \$50 - Position3 | |

The participant gets assigned to a third position, and Compensate and Pay is re-run for January. The third position generates new earnings of \$50 in the Revenue earning group, and this along with an additional \$40 generated in the Revenue earning group by Position1 generates a trial payment of \$90 for the Revenue earning group.

Calculation Run #5: Post stage run, January

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|---|----------------------------------|--|---------------------------------------|---|
| Commission | | -\$500 balance posted (unapplied) in December | -\$500 | \$350 - Position1 -\$850 - Position2 |
| If negative payments were allowed, there would be a trial payment in the amount of -\$350 for the Commission earning group. | | \$150 | \$100 - Position1 \$50 - Position2 | |
| Bonus | | \$500 balance posted (applied) in December | \$500 | \$500 - Position2 |
| \$595 posted payment for January | | \$95 | \$25 - Position1 \$70 - Position2 | |
| Revenue | \$900 posted payment for January | | \$900 | \$900 - Position1 |
| \$90 posted payment for January | | \$90 | \$40 - Position1 \$50 - Position3 | |

After running the Post stage, the trial earnings and payments for the Revenue earning group are marked as posted, except for the trial earnings for the Commission earning group. Other items are unchanged.

Calculation Run #6: Finalize stage run, January

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|----------------------------------|----------------------------------|--|---------------------------------------|---|
| Commission | | -\$500 balance posted (unapplied) in December | -\$500 | \$350 - Position1 -\$850 - Position2 |
| \$150 balance posted in January | | \$150 | \$100 - Position1 \$50 - Position2 | |
| Bonus | | \$500 balance posted (applied) in December | \$500 | \$500 - Position2 |
| \$595 posted payment for January | | \$95 | \$25 - Position1 \$70 - Position2 | |
| Revenue | \$900 posted payment for January | | \$900 | \$900 - Position1 |

| Earning Group | Payment | Balance (Prior Period) | Earning | Deposit & Position |
|------------------------------------|---------|------------------------|------------------|--------------------|
| \$90 posted payment for January | | \$90 | \$40 - Position1 | |
| | | | \$50 - Position3 | |

After Finalize is run, the trial status earnings of \$150 for the Commission earning group is marked as posted and converted to a balance. If February is run next, there are two unapplied posted balances from the prior January period (-\$500 and \$150) in the Commission earning group.

23 Deletion Policies Overview

When deleting an object that is referred to by another object, Commissions does one of the following:

- Deletes both the object and the referring object.

For example, if you delete a category, Commissions automatically deletes the category's subcategories.

- Disallows deleting the object.

For example, Commissions does not allow you to delete a title if it is assigned to a position because deleting it would essentially “break” the owning object. Similarly, you cannot delete objects that are associated with results data (credits, measurements, incentives, deposits, and payments).

- Deletes the object and disassociates it from the referring object.

For example, if you delete a position, Commissions retains participants that were associated with the position and disassociates the participants from the position.

Related Information

- [Deleting Reference Data \[page 350\]](#)
- [Deleting Administrative Data \[page 354\]](#)

23.1 Deleting Reference Data

When you delete a reference data object, SAP Commissions marks all versions of that object as removed from the Repository. For example, if you delete the participant Michael Robinson on January 15, 2008, his data is removed for all versions both before and after that date. After an object is deleted, you can find information about the object only from the *Audit Log* workspace. The following tables summarizes the actions taken by SAP Commissions when you delete reference data (organization data, classification data, plan data, and rules elements) that is not associated with results data.

Deleting a Participant

| Referring Object | When you delete a Participant, Commissions' Policy is to: |
|------------------|---|
| Position | Disassociate the position from the participant |

Deleting a Title

Referring Object **When you delete a Title, Commissions' Policy is to:**

| | |
|----------|--|
| Position | Disallow deleting the title if a position holds it |
|----------|--|

| | |
|------|---|
| Plan | Disassociate the plan refers from the title |
|------|---|

| | |
|---------------------|--------------------------------|
| Variable Assignment | Delete the variable assignment |
|---------------------|--------------------------------|

Deleting a Position

Referring Object **When you delete a Position, Commissions' Policy is to:**

| | |
|-------------|--|
| Participant | Disassociates participants from the position |
|-------------|--|

| | |
|-------|---------------------------------------|
| Title | Disassociates title from the position |
|-------|---------------------------------------|

| | |
|---------|---|
| Manager | Disassociates the Manager from the position |
|---------|---|

| | |
|----------------|---|
| Position group | Disassociates position groups from the position |
|----------------|---|

| | |
|------|---------------------------------------|
| Plan | Disassociates plans from the position |
|------|---------------------------------------|

| | |
|--------------|--|
| Subordinates | Disassociate the subordinate positions from the position |
|--------------|--|

| | |
|----------------------------------|--|
| Relationships to Parent position | Delete the relationship to the parent position |
|----------------------------------|--|

| | |
|----------------------|---------------------------------|
| Variable Assignments | Delete the variable assignments |
|----------------------|---------------------------------|

| | |
|--------------|---|
| Results Data | Disallow deleting the position if the position has associated results |
|--------------|---|

Deleting a Position Group

Referring Object **When you delete a Position Group, Commissions' Policy is to:**

| | |
|----------|--|
| Position | Disallow deleting the position group if it contains the position |
|----------|--|

Deleting a Relationship

Referring Object **When you delete a Relationship, Commissions' Policy is to:**

| | |
|-----------------|--|
| Source position | Disassociate the source position from the relationship |
|-----------------|--|

| | |
|-------------------|--|
| Receiver position | Disassociate the receiver position from the relationship |
|-------------------|--|

| | |
|-----------|--|
| Roll Type | Disassociate the roll type from the relationship |
|-----------|--|

Deleting a Plan

| Referring Object | When you delete a Plan, Commissions' Policy is to: |
|-------------------------|---|
| Rules | Disassociate the rules from the plan |
| Calendar | Disassociate the calendar from the plan |
| Positions, Titles | Disallow deleting the plan if any positions or titles refer to it |
| Variable Assignment | Delete the variable assignment |

Deleting a Rule

| Referring Object | When you delete a Rule, Commissions' Policy is to: |
|-------------------------|---|
| Rule Elements | Disassociate the rule elements from the rule |
| Input References | Delete the input references |
| Output References | Delete the output references |
| Plans | Disallow deleting the rule if any plans refer to it |
| Calendar | Disassociate the calendar from the rule |

Generic attributes are only referenced by rules. Deleting the rule does not delete the attribute.

Deleting a Formula

| Referring Object | When you delete a Formula, Commissions' Policy is to: |
|-------------------------|--|
| Rules | Disallow deleting the formula if any rules refer to it |
| Rule Element | Disallow deleting the formula if any rule elements refer to it |

Deleting a Variable

| Referring Object | When you delete a Variable, Commissions' Policy is to: |
|-------------------------|---|
| Default element | Disassociate the default element from the variable |
| Required period type | Disassociate the period type from the variable |
| Assignments | Disallow deleting the assigned variable |
| Rules | Disallow deleting the variable if any rules refer to it |
| Rule Element | Disallow deleting the variable if any rule elements refer to it |

Deleting a Variable Assignment

| Referring Object | When you delete a Variable Assignment, Commissions' Policy is to: |
|-------------------------|--|
| Owner | Disassociate the owner from the variable assignment |
| Variable | Disassociate the variable from the variable assignment |
| Rule element | Disassociate the rule element from the variable assignment |

Deleting a Territory

| Referring Object | When you delete a Territory, Commissions' Policy is to: |
|-------------------------|--|
| Variable assignments | Disallow deleting the territory if it is assigned to a variable. |
| Variables | Disallow deleting the territory if a variable refers to it. |
| Rules | Disallow deleting the territory if any rules refer to it |

Deleting a Rate Table

| Referring Object | When you delete a Rate Table, Commissions' Policy is to: |
|-------------------------|---|
| Variable assignments | Disallow deleting the rate table if it is assigned to a variable |
| Variables | Disallow deleting the rate table if a variable refers to it |
| Rules | Disallow deleting the rate table if a rule refers to it |
| Rule Element | Disallow deleting the rate table if any rule elements refer to it |

Deleting a Lookup Table

| Referring Object | When you delete a Lookup Table, Commissions' Policy is to: |
|-------------------------|---|
| Rules | Disallow deleting the lookup table if any rules refer to it |
| Rule Element | Disallow deleting the lookup table if any rule elements refer to it |

Deleting a Fixed Value

| Referring Object | When you delete a Fixed Value, Commissions' Policy is to: |
|-------------------------|---|
| Rules | Disallow deleting the fixed value if any rules refer to it |
| Variable assignments | Disallow deleting the fixed value if it is assigned to a variable |

| Referring Object | When you delete a Fixed Value, Commissions' Policy is to: |
|-------------------------|--|
| Variables | Disallow deleting the fixed value if a variable refers to it |
| Rule Element | Disallow deleting the fixed value if any rule elements refer to it |

Deleting a Classifier

| Referring Object | When you delete a Classifier, Commissions' Policy is to: |
|-------------------------|--|
| Category hierarchy | Disassociate the category from the classifier |
| Transactions | Disallow deleting the classifier if it has transactions associated with it |
| Territory | Disallow deleting the classifier if any territory refers to it |
| Rule | Disallow deleting the classifier if any rule refers to it |

Deleting a Category

| Referring Object | When you delete a Category, Commissions' Policy is to: |
|-------------------------|---|
| Category hierarchy | Disassociate the category from the category hierarchy. |
| Parent category | Disassociate the parent category from the category |
| Subordinate categories | Delete the subordinate categories |
| Classifiers | Disassociate the classifiers from the category |
| Rule | Disallow deleting the category if any rule refers to it |
| Territory | Disallow deleting the category if any territory refers to it |

23.2 Deleting Administrative Data

There is no general deletion policy for Administrative Data objects. See the Commissions Administrator Online Help for information about deleting these objects.

24 About Modeling

Commissions Modeling provides customers with tools to better predict the impact of any proposed changes and plan for a number of scenarios leading to enhanced control over compensation spend. It extracts period-over-period trends in primary measurements and creates model data from this historical data. After designing a model, Commissions Modeling helps to perform a model run. A model run is similar to a calculation run and generates model period data from historical primary measurements based on the modeling specifications provided. With enhanced modeling, compensation administrators can design, test and implement incentives rapidly.

Related Information

- [Modeling Workspace \[page 355\]](#)
- [Modeling Procedure \[page 358\]](#)

24.1 Modeling Workspace

Select the *Models* tab in the Commissions to open the *Models* workspace. After you select, the summary pane populates with all existing models.

In the production environment modeling is enabled, eliminating the need of separate sandbox environment for plan simulation scenarios. Model plans are virtually sandboxed in the same instance. Also administrators can model individual or selected plans and selected participants.

The workspace consists of the following panes:

- The Summary pane - displayed in the List view
- The Detail pane - displayed in the Detail view
- Search and Related search panes to the right

These components of the Modeling workspace are described in more detail in the following sections.

Toolbar

The workspace toolbar provides access to the actions described in Table 1.

| Name | Function |
|---------------|---|
| Create Model | Creates a new model. |
| Delete Model | Deletes a model. |
| Save | Saves Model created in the Detail View. |
| Cancel | Clears unsaved Model details. |
| Run | Starts a model run. |
| Clear Results | Clears results of the last model run. |
| Promote Model | Promotes the model. |

Table 1: Toolbar Options

Search Pane

The action panes provide access to the following actions:

| Name | Function |
|--------|---|
| Search | Enter search term in the entry field and click Go for a name-based search. Click Search to access the Simple and Advanced Search dialogs. |

Table 2: Action Pane

Summary Pane

The Summary pane displays search results and can be used to select items to show in the *Detail* pane. Scroll to the right to view all of the columns in the *Summary* pane.

Detail Pane

The *Detail* pane displays information and options related to the model selected in the *Summary* pane. This pane contains two tabs: Model tab and Results tab, which are shown in the following sections.

Model Basics

The figure above shows a model. The detail view includes the fields described in Table 3.

| Name | Function |
|---------------------------|---|
| Model Name | A unique name given for this model. |
| Description | A detailed description of this model. |
| Calendar | Calendar for the source/planning periods. |
| Status | Status of the model. |
| Processing Unit | Allows you to filter model data through a processing unit. This option is only available if the Use Processing Units option is selected in Calculation Preferences. |
| Budget | Budget for the model period. |
| Budget Value | |
| Planning Periods | Period for which the model is planned to be rolled into production. |
| Source Periods | The period range from which actuals are obtained and model data is created. |
| Model Periods | The period range for which model data is planned to be promoted. |
| Transaction Inputs | |
| Uplift source period data | Used for mass adjusting selected input for the model. |

Results Tab

Table 4: Fields in the *Results* Tab

i Note

The indicator about the model has been changed since the last run.

Results tab is only available for models in the *Run* status. Click the *Results* tab. You see the rollup results summary from the last model run for the selected model. Click the sign next to each result type to expand it and view the aggregation by result name.

i Note

If there are transactions or incentives of different unit types, the model results summary panel for a model will show total values as "Various".

24.2 Modeling Procedure

It is required to have existing production data in order to use the modeling feature.

Creating a Model

1. Select the *Models* tab to open the *Commissions Modeler* workspace. The *Summary* panel populates with all the models.
2. Click *Create Model*.
3. Enter a unique model name in the *Model Name* field.
4. Enter a description of the model in the *Description* field. This field is optional.
5. Select the *Calendar*.
6. Select the *Processing Unit* if processing units are enabled.
7. Select the *Budget* (optional)
 - Budget for Model Period (or)
 - Calculate budget as % of transaction value
8. Perform the following:
 1. Select the *Source Date* for Model. Choose a starting planning period(Effective date of model if promoted to production) under *From* and a last planning period under *Through*.
 2. Select the *Source Periods* (Source Date for Model). Choose a starting planning period under *From* and a last planning period under *Through*.

Planning Period and Source Period

A **Source** period has the following main functions:

- Determining which plans can be added as part of the model.
- Historical organization and classification reference data from the Source period is used in the model.
- Historical transaction or measurement data from the Source period can be used as an input to the model (simulated data or projected data can also be used as an input to the model).
- Model calculation results are created in the Source period, but under the model context.

A **Planning** period (Effective date of model if promoted to production) defines the period for which you plan to roll the changes into production. The planning period selected does not impact model reference data and results.

Model Inputs Options, Model Transactions, and Uplift

A model can be based on source period transactions, uploaded model transactions or source period primary measurements.

- The *Use transactions from the source period* option allows reusing existing source period transactions during the model run. Optionally, additional uploaded transactions can be used along with source period transactions. Model run recalculates results starting from credits.
- The *Use only measurements from the source period* option allows to reuse existing source primary measurements during the model run. Model run recalculates results starting from secondary measurements.
- The *Use new model transactions only* option allows to use only transactions uploaded for this model. Model run recalculates results starting from credits.
- Uploaded transactions exist in model context only and are not available outside the model. Model run executes Classification stage for all uploaded transactions. Production transactions are not reclassified during the mode run. To upload model transactions, click on either the first or last option under *Transaction Inputs* to make the *Upload Transactions* option active.
- Use the *Upload Transaction* option to upload transactions. To upload Sales transactions, in the *Orders and Transactions* workspaces for Results, and the Participants, Positions; *Titles* workspaces for Organization, and Categories, Products, Customers, Postal Codes for Classification, upload data contained in an Excel worksheet template matching the columns used in the workspace. You can also manually create model transactions, in the *Transactions* workspace. Click on the related transactions link in the *Related* bin to open *Transactions* workspace in the model context, and create model sales transactions manually.
- Once model transactions are uploaded, the link to *Transactions* workspace from the model details gets enabled. The link also displays the number of created model transactions. (You can also perform a model *uplift*. This allows mass adjusting the selected input for the model only for historical data. Newly uploaded model transactions are not adjusted. Adjusting historical data here does not impact the live data. This option can be used to simulate market growth. For example: if you assume that market has grown by 10%since the historical periods, then use 10% for this field to adjust all inputs.)
- To review the uploaded transactions, click on the *Uploaded Transactions* link in the *Model Definition* tab, or *Transactions* link in the *Related* bin.

Adding a Plan

1. Save the *Model Definition* before simulating a plan in the same tab.
2. Click *Modeled Plans*.
3. Use simple query dialog to select a plan or type a plan name, and select the plan to be added to the model from the drop down.
4. Save the *Model* definition.

i Note

More than one plan can be added to a Model. The copy of the plan and all plan-related compensation elements are created when adding a plan.

Editing a Model/Plan

1. Click any model to edit its name.
2. Click *Model Name* option and rename the model accordingly in the *Model Definition*.

i Note

Model source periods cannot be updated if there are model results and simulated plans. Simulated plans can be edited. Any change to the modeled objects does not affect production objects. New objects, created in the model context, are not visible in production as well.

Deleting a Model/Plan

1. Select the *Plan* to be deleted in the *Models* tab.
2. Click *Delete*.

To Delete a Model

1. Click a model to delete in the list view.
2. Click *Delete Mode*.

Generating Results for a Model/Model Run

After a model is created, you can generate results for that model by performing a model run. The model input selection decides the stage that would run. Once the input options are selected, then the model is run.

- If the *Use source period PMs* option is selected, then model runs CreateDefaultData and Reward.
- If the *Use txns* option is selected as a model input, it runs CreateDefaultData, Classify (for model transactions only), Allocate and Reward.

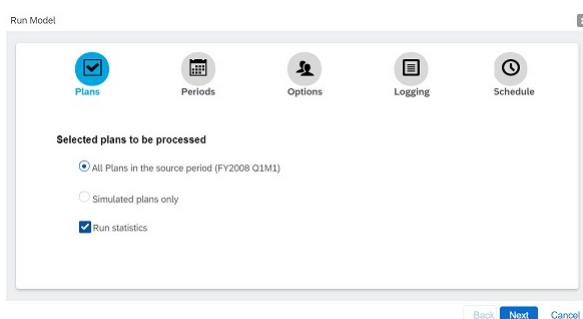
To Generate Model Results

Select the model you want to run and click *Run*. A dialog appears warning you that performing a model run removes any associated results for the model period(s).

If you do not have any results data for the model period(s), or you have results data that can be overwritten, click *Yes*. If you do not want to overwrite data in the model period(s), click *No* to exit.

Steps to Run a Model

1. Go to *Plan Data > Models*.
2. Select the model you want to run and click *Run*.
3. Click *Yes* in the warning dialog to clear associated results and proceed.
4. Perform the following steps in the *Run Model* dialog.



1. Select the Plans to be processed. You can choose to process *All Plans in the source period* or *Simulated plans only*. When *Run Statistics* is enabled, statistics are gathered as part of model runs, resulting in up-to-date statistics after every model run. Unselect the *Run Statistics* option if you do not want to gather statistics. Click *Next*.
 2. In *Periods*, choose the periods that you want to run the pipeline for. Click *Next*.
 3. In *Options*, choose who you want to run the calculation for. You can select *Process all transactions for all* or specify the Positions to be processed. Click *Next*.
 4. In *Logging*, specify if you want to enable advanced logging. Select *Yes* or *No*. Click *Next*.
 5. In *Schedule*, schedule the *Calculation Run*. Select *Run Now* to run the calculation immediately. Select *Schedule to run on the following time* to schedule the calculation.
 6. The *Summary* dialog displays a preview of the selected options. Click *Start* to run the Model.
5. After the model run is initiated, you will be redirected to the *Calculation* workspace automatically. Alternatively, you can check the status of the model run from the command line by entering the following command from the < Commissions_HOME>\pipeline\bin directory: CommissionsGrid showPipelineStatus tenantId=<tenantId>. For each period you chose to model, a calculation run is listed.

i Note

- Do not run a model if KPR processing is enabled.
- Model results can be cleared by selecting the model and clicking on *Clear Results* in the *Results* tab.
- Administrators can modify plans and simulate the effects of proposed changes before rolling out the changes to production. Users can perform macro level modeling for overall cost impact or micro level modeling for individual impact.

Comparing Models

Users can review model results in the *Model Results* tab in Commissions and also compare and contrast multiple models in Reporting & Analytics in a custom Web intelligence report.

Promoting Models

- Be careful with promotions because the promotion updates production objects. The promotion is final and cannot be reverted.
- Special user role permission is needed in order to promote a model. The permission is disabled by default.
- Compensation Administrators can seamlessly promote the individual plans to production.
- Verify if model elements refer to missing classification objects, prior to promotion.
- Do not change the Input/Return type of the simulated rule elements, if these rule elements are used in production rules.
- Model promotion validation and promotion metrics count internal objects. The number of objects to promote might be higher than user expects.
- Promoting territories with dates not in the period boundaries, is the same as other rule elements (rate tables, formulas), except that the intra-version dates for period boundaries do not need to be adjusted. For example:

Start = 1/10/2006 and End = 3/22/2006?

Territory TER1 has three versions that overlap Jan 2006 - Mar 2006 source periods:

1/07/2006 - 1/16/2006

1/16/2006 - 3/22/2006

3/22/2006 - 4/05/2006

Promoting the model to January - June 2007 (shift = 365 days):

1/01/2007 - 1/16/2007

1/16/2007 - 3/22/2007

3/22/2007 - 4/01/2007

1/01/2007 and 4/01/2007 dates are the result of "stretching" to cover promotion periods, but 1/16/2007 and 3/22/2007 dates are derived from "365 days" shift and not adjusted to period boundaries.

To Promote a Model

1. Click a model to promote.
2. Click *Promote Model* in the *Results* tab. The *Promotion* dialog is displayed.
3. Select *promotion periods* if required.
4. Validate and review promotion validation metrics.
5. Promote the model if validation is successful. Provide more details such as promotion periods, validation, validation metrics, promotion, and promotion metrics.

24.3 Quotas

Special treatment of Quotas in Modeling:

- Modeled Quota structure cannot be changed.
- The existence of positions with quota values in the promotion period should be insured prior to the promotion.
- Non-leaf period quota values are promoted keeping the period range, so it can change production results outside promotion periods. For example, if the promotion period is January 2013 and the yearly quota is updated in modeling, the quota value is going to be changed for the year of 2013 after promotion. It is not going to be changed for January 2013 only. Please add examples to illustrate the above statements.

i Note

Cloned quota only shows values for the position originally assigned to the simulated plan.

For example:

- Assign one position to a plan.
- Populate quota values for this position and another position.
- Model the plan - modeled quota has values for the assigned position only.
- Go to production. Assign the second position to the plan
- Go back to the model - the second position shows up in the plan assignment, but still no quota values.

Lookup Tables

Special treatment of Lookup Tables in Modeling:

- Modeled lookup table structure cannot be modified. Cell values can be modified.
- The lookup table structure is extended to the promotion period(s), if needed, along with all dimensions and only indexes, which are falling into the model source period(s).

For example, the lookup table has the following structure:

- Dimension A Index A1 is defined from January 2011 to February 2011
- Dimension A Index A2 is defined from January 2011 to end of time
- Dimension A Index A3 is defined from February 2011 to December 2011

Model a plan which is using this lookup table. Set model source period to March 2011. Make changes and promote the model from March 2012 to end of time. As a result,

- Dimension A Index A1 is defined from January 2011 to February 2011 and not extended
- Dimension A Index A2 is defined from January 2011 to end of time
- Dimension A Index A3 is defined from February 2011 to end of time (extended)

i Note

Administrators will be able to model all plan components including rules, quotas, territories, rate tables.

25 References to Measurements and Incentives

Each measurement and incentive generated by the Calculation is associated with a period. When using measurements or incentives in rules, you must consider whether:

- The associated period is at the leaf-level or a higher level period. The leaf-level is the smallest period unit of your calendar, usually a month or two weeks. When you reference the non-leaf value of a measurement, you are asking for the sum of leaf values that span the referenced higher-level period.
- The value of measurements or incentives is synthetic or persistent; stored in the database or available dynamically.
- The rule is references values that it generated (self-referencing).

Measurement or incentives are referred to using Name: period notation. For example, a reference to the quarter-based version of the GolfPM measurement looks like GolfPM:quarter: UnitType. Persistent values are the period-based versions of measurements and incentives that Commissions stores in the database. For example, the month-based output of a primary measurement rule is a persistent value. Synthetic values are the higher-level period versions of measurements and incentives that Commissions calculates automatically but does not store them in the database. Synthetic values are created to make processing faster. Commissions calculates synthetic values during calculation run's and do so regardless of whether the synthetic values are referenced in any rules. For example, the quarter- and year-based versions of a primary measurement are synthetic values.

Related Information

- [Primary Measurements \[page 364\]](#)
- [Secondary Measurements and incentives \[page 365\]](#)
- [Period Type Parameters and Rate Tables \[page 370\]](#)

25.1 Primary Measurements Overview

All primary measurements are aggregates of credits, and therefore primary measurements are leaf-period values themselves. Credits from multiple leaf periods don't aggregate into a primary measurement; however, held credits can be aggregated. For example, credits calculated in January and held until February are aggregated to the February primary measurement along with February credits.

A primary measurement represents credits for just the leaf period (for example, a month's worth of credits). There can be many different primary measurements for a particular period. In most cases, each primary measurement represents an aggregate of different types of credits; however, depending on the compensation rule, you can have multiple primary measurements from the same types of credits. There's a separate primary measurement for each leaf period (for example, a month).

Related Articles

- [References to Synthetic Versions of Primary Measurements \[page 365\]](#)

25.1.1 References to Synthetic Versions of Primary Measurements

While primary measurements are always based on the leaf period's business activity, a rule can point to a synthetic version (non-leaf version) of a primary measurement. The value of a primary measurement's synthetic version is the sum of the leaf periods within that higher level period, period-to-date. The synthetic version of a primary measurement includes the current leaf-period value when the offset is 0; however, depending on the compensation rule, you can also set an offset to 1 quarter and the synthetic value then includes leaf period values of the prior quarter. For example, in January the value of GolfPM:quarter is only the January business activity, even if February and March monthly values have already been calculated and you are rerunning January.

When Commissions calculates the leaf period values, it automatically calculates the higher level period values, such as quarter and year versions of primary measurements. These are synthetic values and Commissions does not store these higher level period values in the database. For example, when Commissions calculates the monthly value for April (GolfPM:month), it automatically calculates the higher level period values (GolfPM:quarter and GolfPM:year). GolfPM:quarter and GolfPM:year are available for use in rules and calculations, but they are not stored in the database. They are available during a calculation run.

In April, the value of GolfPM:quarter is \$550. This value represents the quarter-to-date revenue for the second quarter. To summarize, the synthetic version of a primary measurement represents the period-to-date value. This includes the current leaf period value if the offset is not used (0).

i Note

For most references, the current period's value is included. The exception is for self-references.

25.2 Secondary Measurements and Incentives Overview

Secondary measurements and incentives are also calculated monthly, and they can represent business activity either for a distinct leaf period or over multiple leaf periods. A secondary measurement can aggregate the data from other primary measurements. An incentive can aggregate the data from measurements or other incentives. The following figure illustrates an example of a secondary measurement that represents a month's worth of business activity.

In the example illustrated previously, the Total Revenue secondary measurement aggregates the monthly GolfPM and AircraftPM values. The following figure illustrates an example of a secondary measurement that represents a quarter-to-date amount of business activity.

This is a secondary measurement that is based on three months' worth of data for two product lines (quarter to date). This secondary measurement calculates monthly but represents the quarter to date total. Every month, this secondary measurement calculates the quarter-to-date value so far for the current quarter.

Related Articles

- [Persistent and Synthetic Versions of Measurements \[page 366\]](#)
- [Persistent and Synthetic Versions of Incentives \[page 366\]](#)
- [References to Measurements and Incentives \[page 367\]](#)
- [Issues with References to Secondary Measurements and Incentives \[page 367\]](#)

25.2.1 Persistent and Synthetic Versions of Measurements

For primary and secondary measurements, Commissions creates the persistent version for the leaf level period (for example, month). Commissions also calculates the synthetic, higher level period values for the measurement (for example, quarter and year versions).

25.2.2 Persistent and Synthetic Versions of Incentives

Commissions generates persistent and synthetic versions of incentives similar to those for measurements. However, incentives are not necessarily based on the leaf period. When you create an incentive rule, you specify the period type for the output of the rule. Commissions generates synthetic versions of incentives only for those periods that are of a higher level than the period type of the incentive itself.

For example, you can have a quarterly incentive rule that pays out a bonus once a quarter. For this rule, Commissions would calculate and store a persistent value for the quarter period, and would calculate a synthetic value for the year period. In this case, Commissions would not create a month-based version for a quarterly incentive rule.

As shown, Commissions stores the quarterly GolfBonus value with the quarter period. Each month, Commissions calculates the GolfBonus value and overwrites the previous month's calculation within the quarter, until the last month in the quarter when the bonus is released for deposit. An incentive based on a higher-level period is available for deposit during the last leaf period within the specified higher level period type. The last leaf period of a higher level period is determined by the period type of the higher level period. For example, a quarterly incentive is available for deposit during the last month in each quarter.

❖ Example

Example: In January, the GolfBonus value is \$50. In February, Commissions overwrites the January calculation and stores the February calculation, which is now \$115. In March, Commissions overwrites the February calculation and stores the March calculation of \$155. Because March is the end of the quarter, the quarterly GolfBonus is released for deposit in March.

Each month Commissions calculates the quarterly bonus, but each month in the quarter it overwrites the previous month's calculation. Commissions releases the bonus for deposit in the last month of the quarter.

25.2.3 References to Measurements and Incentives

A reference is a method of including a measurement or incentive value in another rule or in a formula. The reference acts as a placeholder for the measurement or incentive from the specified period type relative to the current processing period. The following figure illustrates an example of a quarterly incentive rule that refers to the quarter-based version of a primary measurement.

For example, to use the quarter-based version of the GolfPM measurement in an incentive rule called GolfBonus, you include a reference to the GolfPM measurement in the GolfBonus rule, and you specify "quarter" as the period type. When the GolfBonus rule runs in March, it gets the quarter-based version of the GolfPM measurement that is calculated in March, which is essentially a quarter-to-date value. The March quarter-based version of the GolfPM measurement includes the monthly values from January, February, and March. When the GolfBonus rule runs in May, it gets the quarter-date amount of the GolfPM measurement. The May quarterly version of the GolfPM measurement includes the monthly values from April and May.

For references to measurements, you specify the period-based version by specifying the measurement.

For references to incentives, you specify the period-based version by specifying the incentive period.

25.2.4 Issues with References to Secondary Measurements and Incentives

You can include a reference to the leaf or higher-level period versions of primary measurements. Because primary measurements always represent business activity from one leaf period, both the leaf or higher-level period versions make sense to use. However, unlike primary measurements, secondary measurements and incentives frequently represent data that crosses leaf period boundaries.

For example, you can include a reference to the quarterly value of the GolfPM measurement to get the sum of the monthly values in a particular quarter. As another example, a secondary measurement can, each month, calculate the Golf Revenue quarter-to-date, as shown in the following figure. This secondary measurement calculates a quarter-do-date amount each month. The leaf-level versions already represent an aggregation of data. If you refer to a non-leaf level version of this secondary measurement, you are referring to a redundant aggregation of data $(\text{Jan.}) + (\text{Jan.} + \text{Feb.}) + (\text{Jan.} + \text{Feb.} + \text{Mar.})$.

For secondary measurements and incentives, you can refer to either the leaf or non-leaf versions of them. However, referring to the non-leaf version only makes sense when the referenced secondary measurement or incentive represents data from a single leaf period.

If you reference a secondary measurement or incentive in a way that uses a redundant aggregation of data, your payees you are likely to be overcompensate. For example, as shown in the following figure, suppose you want to specify a measurement reference in an incentive rule and that you have two measurements to choose from:

- A primary measurement that calculates a month-to-date revenue.
- A secondary measurement that calculates quarter-to-date revenue

In this example, if you create a bonus rule to calculate 10% of the measurement value, the result varies depending on which measurement value you choose.

Calculation Based on Different Measurements

| Measurement | Calculation |
|--------------------|--|
| GolfPM:quarter | $10\% \times \text{GolfPM:quarter} = (\text{GolfPM:month (April)} + \text{GolfPM:month (May)} + \text{GolfPM:month (June)})$ $= 10\% \times (55 + 45 + 70) = 10\% \times 170 = \17 bonus |
| GolfRevQTD:month | $10\% \times \text{GolfRevQTD:month (June)} = 55 + 45 + 70 = 10\% \times 170 = \17 bonus |
| GolfRevQTD:quarter | $10\% \times \text{GolfRevQTD:quarter} = 55 + (55 + 45) + (55 + 45 + 70) = 55 + 100 + 170 = 10\% \times 325 = \32.50 bonus |

If you use GolfPM:quarter or GolfRevQTD:month for the measurement, the bonus is calculated as \$17. If you use the GolfRevQTD:quarter measurement, the bonus is calculated as \$32.50. When you use the quarter-to-date measurement, the result is an overpayment because the measurement results in the redundant aggregation of credits.

25.3 Self-Referencing Rules

You can create a rule that is self-referencing, meaning that the rule creates a measurement or incentive and refers back to the value of that measurement or incentive. You might need to create a self-referencing rule if you need to verify if the value exists already. For example, you want to pay an Over Quota Bonus that fulfills the following requirements:

- In the first period that performance is over quota, pay a \$5000 bonus.
- If the bonus has already been paid during the current fiscal year, do not pay the bonus again.
- If the bonus has already been paid but performance goes below quota in a later period (such as from a debooking), recover the bonus.

The Over Quota Bonus pays as illustrated in the following figure.

To handle the Over Quota Bonus, create two incentive rules: one to handle the creation of the bonus, and the other to handle the recovery of the bonus. The following figure shows the definitions of each of these rules.

Incentive Rules for Bonus Generation and Recovery

| | Rule #1 | Rule #2 |
|-------------|--|--|
| rule name | OverQuotaBonusGeneration | OverQuotaBonusRecovery |
| output name | OverQuotaBonus | OverQuotaBonus |
| period type | month | month |
| condition | if revenue.year > quota.year AND (OverQuotaBonus.year > 0) | if (revenue.year < quota.year) AND (OverQuotaBonus.year > 0) |

| Rule #1 | Rule #2 |
|--------------|--------------------------------|
| bonus amount | \$5000 - (OverQuotaBonus.year) |

In Rule#1, the self-reference is in a monthly incentive rule, and the reference is to the year-based version of the rule's output. In Rule#2, the output is the same name as the output from Rule #1. The two rules have outputs of the same name because they handle all conditions for generating and recovering the same bonus.

To continue the self-reference example, here are the rule output values for January through July:

Bonus Output Values

| | Jan | Feb | Mar | Apr | May | Jun | Jul |
|----------------------|----------------|----------------|----------------|----------------|------------|------------------|----------------|
| over quota? | not over quota | not over quota | not over quota | not over quota | over quota | still over quota | not over quota |
| OverQuotaBonus.month | 0 | 0 | 0 | 0 | \$5000 | 0 | -\$5000 |
| OverQuotaBonus.year | 0 | 0 | 0 | 0 | \$5000 | \$5000 | 0 |

In May, the payee's revenue first exceeds the quota.

Revenue.year > quota.year, so OverQuotaBonus.month = \$5000 - OverQuotaBonus.year = \$5000 - 0 = \$5000

i Note

Because this is a self-reference, the year-based version in May does not include May's monthly value. The value that's used is the same amount as the April value.

In June, the payee's revenue is still over quota:

Revenue.year > quota.year, so OverQuotaBonus.month = \$5000 - OverQuotaBonus.year = \$5000 - \$5000 = \$0

In July, a debooking occurs that results in the payee's revenue now being under quota.

(Revenue.year > quota.year) AND (OverQuotaBonus.year > 0), so OverQuotaBonus.month = \$0 - OverQuotaBonus.year = \$0 - \$5000 = -\$5000

i Note

The year-based version of this self-reference does not include July's value. The value that's used is the same as the June value.

The OverQuotaBonusRecover rule runs instead of the OverQuotaBonusGeneration rule.

i Note

A self-referencing rule cannot refer to the same period-based version as the rule itself creates. For example, if you create a quarterly bonus rule, then if you refer to the output of the rule, you can only refer to the year-based version of the bonus.

25.4 Synthetic Values and Sum Functions

To obtain values to use to determine performance progress so far during a period, use the functions Sum Measurements Period to Date and Sum Incentives Period to Date. These functions show accumulation period to date. The values returned by these functions shows accumulation toward a goal that you can compare, usually through a condition, to something else to determine attainment. The details indicate which value and how much of it to sum. Use a synthetic value instead of a sum period to date function whenever possible. It is faster to process a reference to a synthetic object if you want to include a higher-level period version of a measurement or incentive. For example, to use the year-to-date value of a revenue measurement, you can either reference the synthetic value of the year-to-date measurement, or use the Sum Measurements Period to Date function. The latter option requires calculation and a call to the database.

25.5 Period Type Parameters and Rate Tables Overview

When you create an incentive rule with a rate table, you must specify additional period versions, for example, in a step commission rule. When you create an incentive rule with a rate table, you must specify the following period type parameters:

- Measurement period

The period type that specifies the performance measurement for which the participant should be paid. For example, if the incentive rule's measurement period = month, the commission rates (in the rate table) apply to the incoming revenue measurement for each month.

- Attainment period

The period type for which attainment is measured; the attainment level determines the applicable rate (from the rate table). For example, an incentive rule could determine the attainment level by the quarter-to-date performance (attainment period=quarter), while paying for just the new revenue each month (measurement period=month).

Period Type Parameters for Use with Rate Tables

| Period Type Parameter | Is the answer to the following question: |
|-----------------------|---|
| Measurement Period | For what incremental revenue does the participant get paid this period? |
| Attainment Period | What revenue period to date is compared to the quota to calculate the attainment? |
| | What revenue period to date represents the attainment? |

25.5.1 Period Type Parameter Examples

The examples in this section illustrate the effects of specifying different combinations of measurement period and attainment period for a sample monthly incentive rule that uses a rate table to calculate the commission.

Measurements and Rate Tables: Scenario 1, Good Practice

In this example, the following period type parameters are specified:

Period Type Parameters: Scenario 1, Good Practice

| Period Type Parameter | Value |
|-----------------------|---------|
| measurement period | month |
| attainment period | quarter |

This scenario pays commission on the monthly revenue, and the pay rate is determined by the quarter-to-date performance. This scenario pays appropriately.

The following table lists the calculations that occur for this incentive rule for the four sample months, January through April. Commissions are appropriate to the generated revenue (neither overpaid or underpaid).

Scenario 1 Commission Calculations

| | Attainment | Measurement Revenue | Commission |
|---|---|---------------------|--|
| January | =2500/6000 = 41.67% | 2500 | 1st tier = 2500 X 5% = \$125 commission |
| February | = (2500 + 3000)/6000 = 5500/6000 = 91.67% | 3000 | 1st tier = 500 X 5% = \$25 2nd tier = 2500 X 10% = \$250 total commission = \$275 |
| March | = (5500 + 1800)/6000 = 7300/6000 = 122% | 1800 | rest of 2nd tier = \$500 X 10% = \$50 3rd tier = \$1300 X 15% = \$195 total commission = \$245 |
| April | = 3500/7000 = 50% | 3500 | 1st tier = 3500 X 5% = \$175 commission |
| Total Commissions January through April | = \$820 | | |

Measurements and Rate Tables: Scenario 2, Bad Practice

In this example, the following period type parameters are specified:

Period Type Parameters: Scenario 2, Bad Practice

| Period Type Parameter | Value |
|-----------------------|---------|
| measurement period | quarter |
| attainment period | quarter |

This scenario pays commission on quarter-to-date revenue each month, and the pay rate is determined by the quarter-to-date performance. This scenario overpays, by paying on the January revenue three times, and the February revenue two times.

The following table lists the calculations that occur for this incentive rule for the four sample months, January through April. Commissions are not appropriate to the generated revenue, as commissions are paid multiple times for January and February.

Scenario 2 Commission Calculations

| | Attainment | Measurement Revenue | Commission |
|-----------------------|--|---------------------|--|
| January | =2500/6000 = 41.67% | 2500 | 1st tier = 2500 X 5% = \$125 commission |
| February | = (2500 + 3000)/6000 = 5500/6000 = 91.67% | 5500 | 1st tier = 3000 X 5% = \$150 2nd tier = 2500 X 10% = \$250 total commission = \$400 |
| March | = (5500 + 1800)/6000 = 7300/6000 = 122% | 7300 | 1st tier = 3000 X 5% = \$150 2nd tier = \$3000 X 10% = \$300 3rd tier = \$1300 X 15% = \$195 total commission = \$645 |
| April | = 3500/7000 = 50% | 3500 | 1st tier = 3500 X 5% = \$175 commission |
| Total Commissions | = \$1345 | | |
| January through April | | | |

Measurements and Rate Tables: General Guideline Summary

To summarize, when you create an incentive rule that uses a rate table, be careful about the period versions that you specify. A secondary measurement rule can calculate year-to-date revenue on a monthly basis (attainment period=month). To use this kind of measurement with a rate table in an incentive rule, you would use an annual quota (quota period=year).

25.6 Using Period-Based Versions of Measurements and Incentives Summary Guidelines

- When you reference the non-leaf value of a measurement, you are asking for the sum of leaf values that span the referenced higher-level period.

- For all non-self-referencing measurements and incentives, the reference includes the current period if the offset is not used.
- Self-referencing measurements and incentives can never include the current period.
- If the secondary measurement or incentive calculates data that crosses leaf-period boundaries, 99% of the time you should use the leaf-period version.
- For references to measurements for use in a rate table, attainment period is an additional criterion.
- Use a synthetic value whenever possible instead of a sum to date function.

26 Integration

In this section, you can find information about integrations related to SAP Commissions.

The target audience of this integration help content includes SAP customers, partners, consultants, and employees. It provides information and support for the following roles in an integration project:

- Integration project managers and team members
- SAP customer system administrators
- SAP Commissions consultants

26.1 Integration with SAP SuccessFactors Employee Central

- [Prerequisites \[page 374\]](#)
- [Configuring SAP Cloud Integration \[page 374\]](#)
- [Initial Load vs. Delta Load \[page 376\]](#)
- [Triggering the Initial Load \[page 377\]](#)
- [Monitoring \[page 378\]](#)
- [Related Articles \[page 378\]](#)

This section describes how to integrate SAP SuccessFactors Employee Central with SAP Commissions using Cloud Platform Integration (CPI) and Commissions Data Loader (CDL). This section describes how to use CPI to trigger the employee replication process. This integration passes Participant, Position, and Title information to SAP Commissions.

Prerequisites

The following are prerequisite tasks that must be completed before proceeding with this integration:

- Deploy required user API credentials for SuccessFactors Employee Central system
- Deploy SFTP user's private key and public key in known hosts of security material
- Provide necessary directory access in SFTP for the user

Configuring SAP Cloud Integration

In the *Design* tab of your SAP Cloud Integration system tenant, open the package SAP SuccessFactors Employee Central with SAP Commissions. This package includes the following three iFlows:

- Participant Replication to SAP Commissions

- Position Replication to SAP Commissions
- Title replication to SAP Commissions

i Note

For more information about the iFlows, visit the [SAP API Business Hub](#).

To configure the integration:

1. Once you have opened the integration package, select the respective iFlow in the package and click on **► Action > Configre** to start the configurations.
2. Configure the Timer Event. Repeat this step for all three iFlows.

The screenshot shows the SAP Integration Studio interface with the 'Timer' tab selected. The configuration details are as follows:

- Schedule:** Schedule Replication Of Position to Commissions System [StartEvent_8]
- Run Type:** Schedule to Recur (selected)
- Frequency:** Daily
- Time Interval:** Every 1 hr, Between 00:00 and 24:00
- Time Zone:** (UTC 1:00) Central European Time(Europe/Berlin)

3. Configure the Employee Central (EC) system user and API URL. Repeat this step for all three iFlows, however, you must use the same credentials and SF API URL for each iFlow.

The screenshot shows the SAP Integration Studio interface with the 'Receiver' tab selected. The configuration details are as follows:

- Receiver:** EC
- Adapter Type:** SuccessFactors
- Connection:**
 - Address: https://qacand-api.lab-rot.ondemand.com
 - Select button
 - Proxy Type: Internet
 - Authentication: Basic
 - Credential Name: BPECSALCOM01
- Processing:**
 - Pagination: Server Snapshot-Based
 - Page Size: 500
 - Timeout (in min): 2

4. Configure the SFTP destination.

The SFTP directory path is different for each iFlow, so you must complete this step for each iFlow and provide the correct directory path.

! Restriction

SAP Commissions must have position information available before assigning manager to positions, therefore for iFlow "Position Replication to SAP Commissions" you will have two folders as follows:

1. without manager assignment

2. with manager assignment

Commissions Data Loader (CDL) imports position information, first from the “without_manager” folder and on success CDL will proceed further with manager assignment by importing from the “with_manager” folder.

The screenshot shows the SAP Fiori interface for configuring a receiver. The 'Receiver' tab is active. The configuration details are as follows:

- Receiver: SFTP
- Adapter Type: SFTP
- Target
 - Directory: /files/Participants
 - Address: 35.247.5.179:2223
 - Proxy Type: None
 - Authentication: Public Key
 - User Name: exchangefiles
 - Timeout (in ms): 10000

- Configure the name of the file and Initial load date-time. Repeat this step for each iFlow. The Execution Timestamp (initial load) should be the same for all three iFlows to maintain consistency. Execution Timestamp is the date-time base upon which employees are pulled from Employee Central for the initial load. After the initial load, the iFlow will automatically run in delta mode and pulls employees from the last successful run. Provide the date as per the following format yyyy-MM-ddTHH:mm:ss.SSSZ.

The screenshot shows the SAP Fiori interface for configuring more parameters. The 'More' tab is active. The configuration details are as follows:

- Type: All Parameters
- ExecutionTimestamp: 2000-01-01T00:00:00.000Z
- FilenamePrefix: SAPS_OGPT_DEV

- Click **Save** to save the settings and deploy if you want to start the replication as per the schedule you created in the Timer Event.

Initial Load vs. Delta Load

In integration scenarios, it is a common practice to distinguish the replication of data between systems as follows:

- Initial load – Date-time from which you want all the data relevant on the source system to be replicated to the target system.
- Delta load – Date-time to ensure all recent changes (post initial load) are replicated from the source system to the target system periodically.

A good practice is to have an initial load to run once so that all data that exists in the source system from the pre-configured time stamp are now part of the target system. Then based on the business use case, you can

occasionally schedule delta replication, as needed. For example, if the frequency of employee record changes happen more on a daily basis, then schedule iFlows to run every 4 hours so that data between the systems are up-to-date.

For this integration content, you can find the current delta load time stamp by checking the value stored in the following variables that are available in .

| Overview / Manage Variables | | | |
|---------------------------------|--------------------------|------------|------------------|
| Variables (3) | | | |
| Name | Content | Visibility | Integration Flow |
| SAP_EC_LastExecutionTime | 2019-05-02T09:00:00.151Z | Global | |
| SAP_EC_Pos_Last_Execution | Download | Global | |
| SAP_EC_Title_Last_ExecutionTime | | Global | |

Triggering the Initial Load

If for some business reason you want to retrigger the initial load, that is, do a refresh of all participants, positions and titles, you must delete the three variables available under Operations View in .

Caution

We do not encourage re-initial load to be performed since it can cause inconsistency.

| Name | Visibility | Integration Flow | Updated At | Retain Until | Actions |
|---------------------------------|------------|------------------|------------------------|------------------------|---------|
| SAP_EC_LastExecutionTime | Global | | May 02, 2019, 14:30:04 | Jun 05, 2020, 14:30:04 | |
| SAP_EC_Pos_Last_Execution | Global | | May 02, 2019, 14:30:08 | Jun 05, 2020, 14:30:08 | |
| SAP_EC_Title_Last_ExecutionTime | Global | | Apr 23, 2019, 17:15:19 | May 27, 2020, 17:15:19 | |

Monitoring

Monitoring information is available in .

| Overview / Monitor Message Processing | | | | | |
|--|--------------|-----------------------|----|---|------------|
| Time: | Status: | Artifact: | or | | |
| May 02, 2019, 15:33:54 - May 02, 2019, 16:33:54 | All | All Integration Flows | | | |
| <hr/> | | | | | |
| Messages (4) | << | < | 1 | / | 1 > >> C |
| Artifact Name | Status | | | | |
| Replicate Position from Employee Central to Commissions | Failed | | | | |
| May 02, 2019, 16:30:08 | 8 sec 110 ms | | | | |
| Replicate Participant from Employee Central to SAP Commissions | Failed | | | | |
| May 02, 2019, 16:30:03 | 3 sec 783 ms | | | | |

Related Articles

- [Integration with S/4 \[page 378\]](#)

26.2 Integration with S/4 (Cloud)

The steps described in this section are part of the process to integrate with SAP S/4HANA. This integration is part of a larger integration between SAP Commissions, SAP S/4HANA, and SAP SuccessFactors Employee Central and Employee Central. For more information about this integration, see [SAP Best Practices Explorer](#).

i Note

As a prerequisite, all org data and transactional data must already be available in SAP Commissions.

See [About Transactions \[page 308\]](#) for more information.

To set up the integration, you must complete the following steps within SAP Commissions:

1. Load employee data into SAP Commissions. See [Integration with SAP SuccessFactors Employee Central \[page 374\]](#) for details.
2. Set Up Commissions Pipeline Rules [\[page 378\]](#)
3. Run Calculations [\[page 378\]](#)
4. Set Up Integration Mapping [\[page 379\]](#)

26.2.1 Set Up Commissions Pipeline Rules

Before you run calculations for commissions in Commissions, you must set up the rules for credits and so on. As a prerequisite, all org data and transactional data must already be available in Commissions. See [About Transactions \[page 308\]](#) for more information.

Set up rules for the following:

- Credits
- Measurements
- Incentives
- Deposits

Once you have set up all of the necessary pipeline rules, begin the calculations process in Commissions as described in [Run Calculations \[page 378\]](#).

26.2.2 Run Calculations

As part of the integration process, you must run calculations in SAP Commissions. The process to run calculations is described in [Run Calculation](#).

Once you have run calculations, complete the additional integration mapping steps described in [Set Up Integration Mapping \[page 379\]](#).

Related Articles

- [Set Up Integration Mapping \[page 379\]](#)

26.2.3 Set Up Integration Mapping

In the integration between SAP Commissions and S/4 Settlement Management, SAP Commissions calculates commissions and passes the data to Settlement Management. Settlement Management uses the data to create a payfile for the Commissions payments.

To successfully complete this integration, you must set the Earning Group Codes and Global Field Numbers, which can be done, respectively, in the [Earning Group Codes \[page 379\]](#) workspace and [Payfile Mappings \[page 382\]](#) workspace.

i Note

The Earning Group Codes and Payfile Mappings workspaces are only available to those who have purchased the integration between SAP Commissions and S/4 Settlement Management.

Related Articles

- [Earning Group Codes \[page 379\]](#)
- [Payfile Mappings \[page 382\]](#)

26.2.3.1 Earning Group Codes

Quick Links

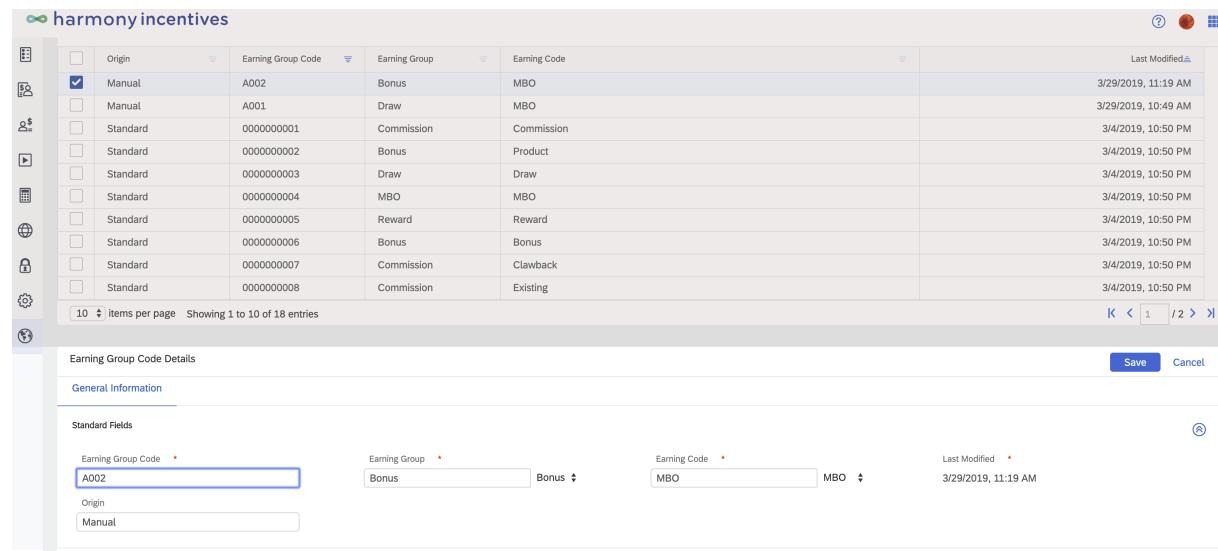
- [Default Earning Group Codes \[page 380\]](#)

SAP S/4 Settlement Management uses Earning Group Codes to identify the payment type so that it can generate a payfile for SAP Commissions data. To integrate SAP Commissions with S/4, every Earning Group-Earning Code combination must be mapped to one, and only one, Earning Group Code. Several Earning Group Code mappings are provided out-of-box, however, you can also add custom Earning Group Codes and map each code to an Earning Group-Earning Code combination.

You can view out-of-box Earning Group Codes, as well as add custom Earning Group codes, in the Earning Group Codes workspace.

To open the Earning Group Codes workspace, in the side menubar, click  >  [Global Field Numbers](#) > [Earning Group Codes](#).

In this workspace, every Earning Group Code is mapped to an Earning Group-Earning Code combination. Each Earning Group Code has an Origin, which is a non-editable field that can either be Standard or Manual. Any Earning Group Code that comes out-of-box has an Origin value of Standard, while custom Earning Group Codes have an Origin value of Manual.



The screenshot shows the SAP Fiori interface for managing Earning Group Codes. At the top, there's a navigation bar with icons for Home, Global, and other applications. Below it is a search bar with the text 'harmony incentives'. The main area contains a table with columns: Origin, Earning Group Code, Earning Group, Earning Code, and Last Modified. There are 18 entries listed. The first entry, 'Manual' (Origin), maps to 'A002' (Earning Group Code), 'Bonus' (Earning Group), and 'MBO' (Earning Code). The last entry, 'Standard' (Origin), maps to '0000000008' (Earning Group Code), 'Commission' (Earning Group), and 'Existing' (Earning Code). Below the table is a pagination bar showing 'Showing 1 to 10 of 18 entries'. To the right of the table is a 'Save' and 'Cancel' button. On the left, there's a sidebar with icons for Home, Global, and other applications. At the bottom, there's a 'General Information' section with fields for Earning Group Code (A002), Earning Group (Bonus), Earning Code (MBO), and Last Modified (3/29/2019, 11:19 AM).

Default Earning Group Codes

There are 16 predefined Earning Group Codes that have been mapped to an Earning Group and Earning Code combination. These predefined Earning Group Codes have numeric values. They cannot be deleted.

Note

Currently, only Earning Group Code 0000000001 and 0000000002 are supported on S4. All other Earning Group Codes will result in errors. More Earning Group Codes will be supported in upcoming releases.

The following table lists the 16 predefined Earning Group Codes, along with the Earning Group and Earning Code to which each is mapped.

| Earning Group | Earning Code | Earning Group Code |
|---------------|--------------|--------------------|
| Commissions | Commissions | 0000000001 |
| Bonus | Product | 0000000002 |
| Draw | Draw | 0000000003 |

| | | |
|-------------|-----------------|------------|
| MBO | MBO | 0000000004 |
| Reward | Reward | 0000000005 |
| Bonus | Bonus | 0000000006 |
| Commissions | Clawback | 0000000007 |
| Commissions | Existing | 0000000008 |
| Commissions | New | 0000000009 |
| Commissions | Product | 0000000010 |
| Commissions | Renewal | 0000000011 |
| Commissions | One Time | 0000000012 |
| Bonus | SPIFF | 0000000013 |
| Bonus | Team | 0000000014 |
| Bonus | Presidents Club | 0000000015 |
| Salary | Salary | 0000000016 |

You can also add custom Earning Group Codes.

To create a custom Earning Group Code:

1. In the *Earning Group Code* workspace, click the  (create) icon.
2. In the *Earning Group Code* details, select an earning Group from the dropdown list.
3. Select an earning code from the dropdown list.

Note

The Earning Group and Earning Code combination can not already be mapped to another Earning Group Code. An error appears when you try to save a mapping for a combination that already exists.

Note:

4. Enter the earning Group Code. The code must be alphanumeric with the format [1 ALPHA]-[9 NUMERIC], e.g. A-100029833.
5. Click *Save*. The system checks if the Earning Group-Earning Code combination has already been mapped. If it has not, the new Earning Group Code is saved. Note that the Origin field for custom fields is automatically set to Manual.

To edit a custom Earning Group Code:

1. Select an Earning Group Code in the Earning Group Code Summary page.
2. Click the  edit icon in the Earning Group Details section. You can edit the Earning Group, Earning Code, and Earning Group Code, as needed.
3. Click *Save*.

Related Articles

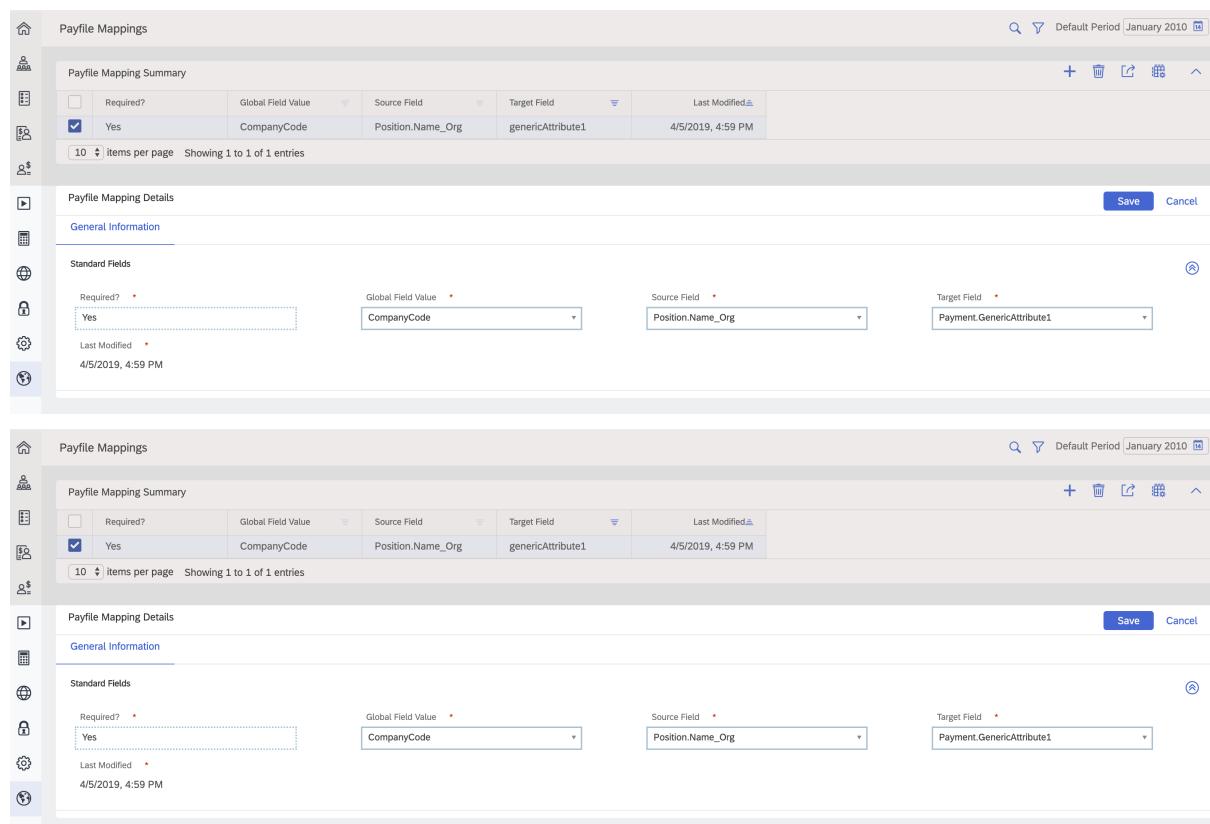
- Set Up Integration Mapping [page 379]
- Payfile Mappings [page 382]

26.2.3.2 Payfile Mappings

S/4 requires a UserID and Company Code to absorb SAP Commissions payment data accurately. This ensures that payment data is associated with the correct person on the S/4HANA side. You can map Position source fields to generic Payment fields within SAP Commissions' Payfile Mappings workspace for a seamless integration with S/4. There are two predefined payment attributes that are available for mapping:

Payment.GenericAttribute1 and Payment.GenericAttribute2. You cannot add additional payment attributes to map. Note that in the Payfile Mappings workspace, the Required? field is preset to Yes, because both Payment attributes must be mapped.

To access the Payfile Mappings workspace, in the side menubar, click on  [Global Field Numbers](#)  [Payfile Mappings](#).



| Required? | Global Field Value | Source Field | Target Field | Last Modified |
|-------------------------------------|--------------------|-------------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> | CompanyCode | Position.Name_Org | genericAttribute1 | 4/5/2019, 4:59 PM |

To map a position attribute to a payment attribute:

1. In the Payfile Mappings Workspace, select a payment attribute to map. The Payfile Mapping Details section opens with the Target Field set to the selected payment attribute.

2. Click  (Edit) in the Payfile Mapping Details section.
3. In Payfile Mapping Details, select the **Global Field Value** from the dropdown list. The two available options are SAP User ID and Company Code.
4. Select the **Source Field** from the dropdown list. The options available are standard and customized Position fields.
5. Click **Save**.

Related Articles

- [Set Up Integration Mapping \[page 379\]](#)
- [Earning Group Codes \[page 379\]](#)

26.2.4 Integration API

For more information about the integration API, see the ODATA API documentation. You can access it using the following URL as an example:

<https://{4 letter moniker}-{environment}.callidusondemand.com/APIDocument/odata/index.html>

For example: <https://cald-dev.callidusondemand.com/APIDocument/odata/index.html>

Fill in the URL with your 4 letter moniker and environment information, as appropriate.

Related Articles

- [Integration with S/4 \[page 378\]](#)

26.3 Integration with S/4 (On Premise)

The steps described in this section are part of the process to integrate with SAP S/4HANA On Premise. This integration is part of a larger integration between SAP Commissions, SAP S/4HANA, and SAP SuccessFactors Employee Central and Employee Central. For more information about this integration, see [SAP Best Practices Explorer](#).

i Note

As a prerequisite, all org data and transactional data must already be available in SAP Commissions. See [About Transactions \[page 308\]](#) for more information.

To set up the integration, you must complete the following steps within SAP Commissions:

1. Load employee data into SAP Commissions. See [Integration with SAP SuccessFactors Employee Central \[page 374\]](#) for details.
2. Set Up Commissions Pipelines Rules for On Premise [\[page 384\]](#)
3. Run Calculations for On Premise [\[page 384\]](#)
4. Set Up Integration Mapping for On Premise [\[page 385\]](#)

Related Articles

- [Integration with SAP SuccessFactors Employee Central \[page 374\]](#)

26.3.1 Set Up Commissions Pipeline Rules

Before you run calculations for commissions in SAP Commissions, you must set up the rules for credits and so on. As a prerequisite, all org data and transactional data must already be available in SAP Commissions. See [About Transactions \[page 308\]](#) for more information.

Set up rules for the following:

- Credits
- Measurements
- Incentives
- Deposits

Once you have set up all of the necessary pipeline rules, begin the calculations process in SAP Commissions as described in [Run Calculations \[page 384\]](#).

26.3.2 Run Calculations

As part of the integration process, you must run calculations in SAP Commissions. The process to run calculations is described in [Run Calculation](#).

Once you have run calculations, complete the additional integration mapping steps described in [Set Up Integration Mapping \[page 379\]](#).

Related Articles

- [Set Up Integration Mapping \[page 379\]](#)

26.3.3 Set Up Integration Mapping

In the integration between SAP Commissions and S/4 Settlement Management, SAP Commissions calculates commissions and passes the data to Settlement Management. Settlement Management uses the data to create a payfile for the Commissions payments.

To successfully complete this integration, you must set the Earning Group Codes and Global Field Numbers, which can be done, respectively, in the [Earning Group Codes \[page 379\]](#) workspace and [Payfile Mappings \[page 382\]](#) workspace.

i Note

The Earning Group Codes and Payfile Mappings workspaces are only available to those who have purchased the integration between SAP Commissions and S/4 Settlement Management.

Related Articles

- [Earning Group Codes \[page 379\]](#)
- [Payfile Mappings \[page 382\]](#)

26.3.3.1 Earning Group Codes

Quick Links

- [Default Earning Group Codes \[page 386\]](#)

SAP S/4 Settlement Management uses Earning Group Codes to identify the payment type so that it can generate a payfile for SAP Commissions data. To integrate SAP Commissions with S/4, every Earning Group-Earning Code combination must be mapped to one, and only one, Earning Group Code. Several Earning Group Code mappings are provided out-of-box, however, you can also add custom Earning Group Codes and map each code to an Earning Group-Earning Code combination.

You can view out-of-box [Earning Group Codes](#), as well as add custom Earning Group codes, in the [Earning Group Codes](#) workspace.

To open the Earning Group Codes workspace, in the side menubar, click   [Global Field Numbers](#)  [Earning Group Codes](#) .

In this workspace, every Earning Group Code is mapped to an Earning Group-Earning Code combination. Each Earning Group Code has an Origin, which is a non-editable field that can either be Standard or Manual. Any Earning Group Code that comes out-of-box has an Origin value of Standard, while custom Earning Group Codes have an Origin value of Manual.

The screenshot shows a SAP Fiori application titled "harmony incentives". At the top, there is a toolbar with icons for search, refresh, and navigation. Below the toolbar is a table listing 18 entries. The columns are: Origin, Earning Group Code, Earning Group, Earning Code, and Last Modified. The "Origin" column contains values like "Manual" and "Standard". The "Earning Group Code" column contains values such as A002, A001, 000000001, etc. The "Earning Group" column lists categories like "Bonus", "Draw", "Commission", "Product", etc. The "Earning Code" column lists specific codes like "MBO", "Draw", "Commission", "Product", etc. The "Last Modified" column shows dates like 3/29/2019, 11:19 AM. At the bottom of the table, there are pagination controls: "10 items per page", "Showing 1 to 10 of 18 entries", and navigation arrows. Below the table is a modal dialog titled "Earning Group Code Details". It has tabs for "General Information" and "Standard Fields". Under "Standard Fields", there are four input fields: "Earning Group Code" (A002), "Earning Group" (Bonus), "Earning Code" (MBO), and "Last Modified" (3/29/2019, 11:19 AM). There is also a dropdown menu for "Origin" set to "Manual". At the bottom right of the dialog are "Save" and "Cancel" buttons.

| Origin | Earning Group Code | Earning Group | Earning Code | Last Modified |
|--|--------------------|---------------|--------------|---------------------|
| <input checked="" type="checkbox"/> Manual | A002 | Bonus | MBO | 3/29/2019, 11:19 AM |
| <input type="checkbox"/> Manual | A001 | Draw | MBO | 3/29/2019, 10:49 AM |
| <input type="checkbox"/> Standard | 000000001 | Commission | Commission | 3/4/2019, 10:50 PM |
| <input type="checkbox"/> Standard | 000000002 | Bonus | Product | 3/4/2019, 10:50 PM |
| <input type="checkbox"/> Standard | 000000003 | Draw | Draw | 3/4/2019, 10:50 PM |
| <input type="checkbox"/> Standard | 000000004 | MBO | MBO | 3/4/2019, 10:50 PM |
| <input type="checkbox"/> Standard | 000000005 | Reward | Reward | 3/4/2019, 10:50 PM |
| <input type="checkbox"/> Standard | 000000006 | Bonus | Bonus | 3/4/2019, 10:50 PM |
| <input type="checkbox"/> Standard | 000000007 | Commission | Clawback | 3/4/2019, 10:50 PM |
| <input type="checkbox"/> Standard | 000000008 | Commission | Existing | 3/4/2019, 10:50 PM |

10 items per page Showing 1 to 10 of 18 entries

Earning Group Code Details

General Information

Standard Fields

Earning Group Code * A002 Earning Group * Bonus Earning Code * MBO Last Modified * 3/29/2019, 11:19 AM

Origin Manual

Save Cancel

Default Earning Group Codes

There are 16 predefined Earning Group Codes that have been mapped to an Earning Group and Earning Code combination. These predefined Earning Group Codes have numeric values. They cannot be deleted.

i Note

Currently, only Earning Group Code 000000001 and 000000002 are supported on S4. All other Earning Group Codes will result in errors. More Earning Group Codes will be supported in upcoming releases.

The following table lists the 16 predefined Earning Group Codes, along with the Earning Group and Earning Code to which each is mapped.

| Earning Group | Earning Code | Earning Group Code |
|---------------|--------------|--------------------|
| Commissions | Commissions | 000000001 |
| Bonus | Product | 000000002 |
| Draw | Draw | 000000003 |
| MBO | MBO | 000000004 |
| Reward | Reward | 000000005 |
| Bonus | Bonus | 000000006 |
| Commissions | Clawback | 000000007 |
| Commissions | Existing | 000000008 |

| | | |
|-------------|-----------------|------------|
| Commissions | New | 0000000009 |
| Commissions | Product | 0000000010 |
| Commissions | Renewal | 0000000011 |
| Commissions | One Time | 0000000012 |
| Bonus | SPIFF | 0000000013 |
| Bonus | Team | 0000000014 |
| Bonus | Presidents Club | 0000000015 |
| Salary | Salary | 0000000016 |

You can also add custom Earning Group Codes.

To create a custom Earning Group Code:

1. In the *Earning Group Code* workspace, click the  Create icon.
2. In *Earning Group Code* details, select an *Earning Group* from the dropdown list.
3. Select an *Earning Code* from the dropdown list. Note: The Earning Group and Earning Code combination can not already be mapped to another Earning Group Code. An error appears when you try to save a mapping for a combination that already exists.
4. Enter the *Earning Group Code*. The code must be alphanumeric with the format [1 ALPHA]-[9 NUMERIC], e.g. A-100029833.
5. Click *Save*. The system checks if the Earning Group-Earning Code combination has already been mapped. If it has not, the new Earning Group Code is saved. Note that the Origin field for custom fields is automatically set to Manual.

To edit a custom Earning Group Code:

1. Select an Earning Group Code in the *Earning Group Code Summary* page.
2. Click the  Edit icon in the Earning Group Details section. You can edit the Earning Group, Earning Code, and Earning Group Code, as needed.
3. Click *Save*.

Related Articles

- [Set Up Integration Mapping \[page 379\]](#)
- [Payfile Mappings \[page 382\]](#)

26.3.3.2 Payfile Mappings

S/4 requires a UserID and Company Code to absorb SAP Commissions payment data accurately. This ensures that payment data is associated with the correct person on the S/4HANA side. You can map Position source

fields to generic Payment fields within SAP Commissions' Payfile Mappings workspace for a seamless integration with S/4. There are two predefined payment attributes that are available for mapping: Payment.GenericAttribute1 and Payment.GenericAttribute2.? You cannot add additional payment attributes to map. Note that in the Payfile Mappings workspace, the Required? field is preset to Yes, because both Payment attributes must be mapped.

To access the Payfile Mappings workspace, in the side menubar, click on > [Global Field Numbers](#) [Payfile Mappings](#).

| Required? | Global Field Value | Source Field | Target Field | Last Modified |
|---|--------------------|-------------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> Yes | CompanyCode | Position.Name_Org | genericAttribute1 | 4/5/2019, 4:59 PM |

To map a position attribute to a payment attribute:

1. In the [Payfile Mappings](#) Workspace, select a payment attribute to map. The [Payfile Mapping Details](#) section opens with the Target Field set to the selected payment attribute.
2. Click (Edit) in the Payfile Mapping Details section.
3. In Payfile Mapping Details, select the [Global Field Value](#) from the dropdown list. The two available options are SAP User ID and Company Code.
4. Select the [Source Field](#) from the dropdown list. The options available are standard and customized Position fields.
5. Click [Save](#).

Related Articles

- [Set Up Integration Mapping \[page 379\]](#)
- [Earning Group Codes \[page 379\]](#)

26.3.4 Integration API

For more information about the integration API, see the ODATA API documentation. You can access it using the following URL as an example:

`https://{4 letter moniker}-{environment}.callidusondemand.com/APIDocument/odata/index.html`

For example: `https://cald-dev.callidusondemand.com/APIDocument/odata/index.html`

Fill in the URL with your 4 letter moniker and environment information, as appropriate.

Related Articles

- [Integration with S/4 \[page 378\]](#)

26.4 Integration with SAP IdP

This section describes the integration between SAP Commissions, Identity Authentication, and Identity Provisioning. This integration allows seamless login to users who are synced between these applications as well as user provisioning.

SAP Commissions supports integration with the following two applications:

- Identity Authentication - In this application, you can create different types of SAP Commissions users. Depending on the user synchronization approach, this application can behave either as the source or target system.
- Identity Provisioning - In this application, you can start the user sync job, and monitor the synchronization process.

Activating SSO

The single sign-on through SAP IdP is not turned on by default. When disabled, users can only access SAP Commissions through the SAP Commissions login page, using their user ID and password. To enable it, you need to contact the support team.

Once set up, users authenticated with Identity Authentication can log in to SAP Commissions without entering their ID or password. Unauthenticated Commissions users that attempt to access a Commissions URL will be redirected to the SAP Identity Access Management login page for authentication.

URL

You will be provided with two URLs:

1. Standard Commissions URL - Users can enter the user ID and password and access SAP Commissions.
2. SAP IdP based Commissions URL - This URL prompts users to enter their user ID and password via IdP and redirects users to SAP Commissions.

User Provisioning

The integration supports user provisioning both in the bottom-up and top-down user synchronization approach. In order to enable this, you need to define target and source systems in your environment. Depending on the user synchronization approach, the target system can either be SAP Commissions (top-down approach) or Identity Authentication (bottom-up approach).

To learn more about the integration between SAP IdP and the Sales Performance Management Suite, see [Sales Performance Management Single Sign-On Administrator Guide](#).

26.4.1 Bottom-Up User Synchronization with Identity Authentication

Introduction

This integration enables you to connect SAP Commissions to the Identity Authentication service to leverage the following benefits:

- Centralized Identity Management
- Single Sign On (SSO)
- Multi Factor Authentication (MFA)

Integration uses a bottom-up approach. Users are created in SAP Commissions and replicated to Identity Authentication. This is a one-way provisioning. No user information is replicated back from Identity Authentication to SAP Commissions.

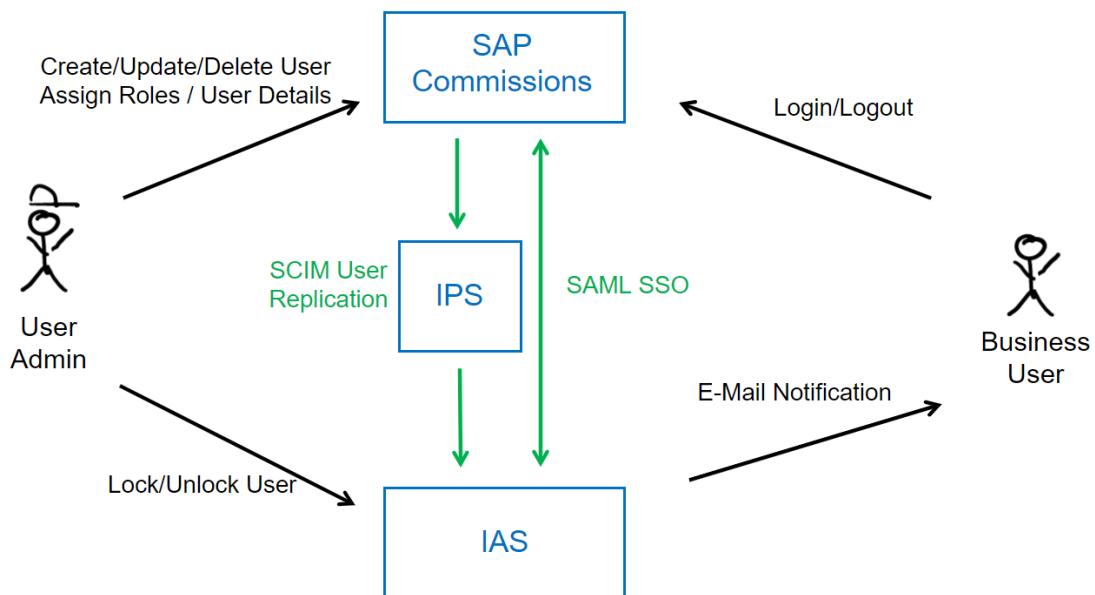
The user administrator mainly works in SAP Commissions. Users are maintained in SAP Commissions and replicated to Identity Authentication.

A typical sequence of steps is as follows:

1. The SAP Commissions User administrator creates new business user in Commissions.
2. The scheduled read job in Identity Provisioning reads the new user from SAP Commissions and creates a new user in Identity Authentication.

3. The Business User receives an onboarding email notification from Identity Authentication.
4. The E-Mail contains a link to the Identity Authentication User Profile. The Business User clicks on it and sets his/her password in Identity Authentication.
5. The Business User logs on to SAP Commissions. The user will access the Commissions SSO URL.
6. SAP Commissions redirects to the Identity Authentication login page where the business user logs in.
7. Identity Authentication redirects to the SAP Commissions Welcome Page on successful login.

Bottom-Up Integration SAP Commissions → IAS



26.4.1.1 Commissions User Management - Overview

SAP Commissions has two different types of users:

Sales Performance Portal Users

Example: Participants

Managed in [Sales Performance Home > User Administration](#)

Commissions Users

Example: Administrators that configure SAP Commissions

Managed in [Commissions > Manage Setup > Security > Users](#)

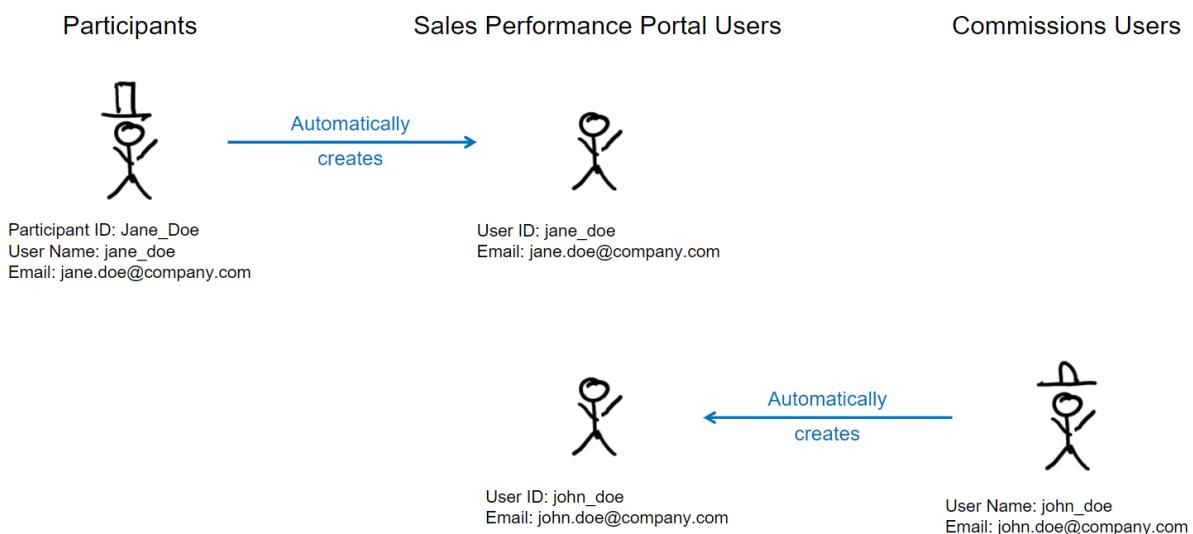
There are different ways to create users in SAP Commissions:

- Via the UI option available in **Sales Performance Home** and **Commissions** (mentioned in the section above).
- Via remote APIs.
- Via File Upload, for example, using Commissions Data Loader (CDL).
- Each Participant record automatically creates a new Portal user record.

- Each Commissions User record automatically creates a Portal user record.

The following image explains how the different records are linked with each other:

Overview Commissions User Management



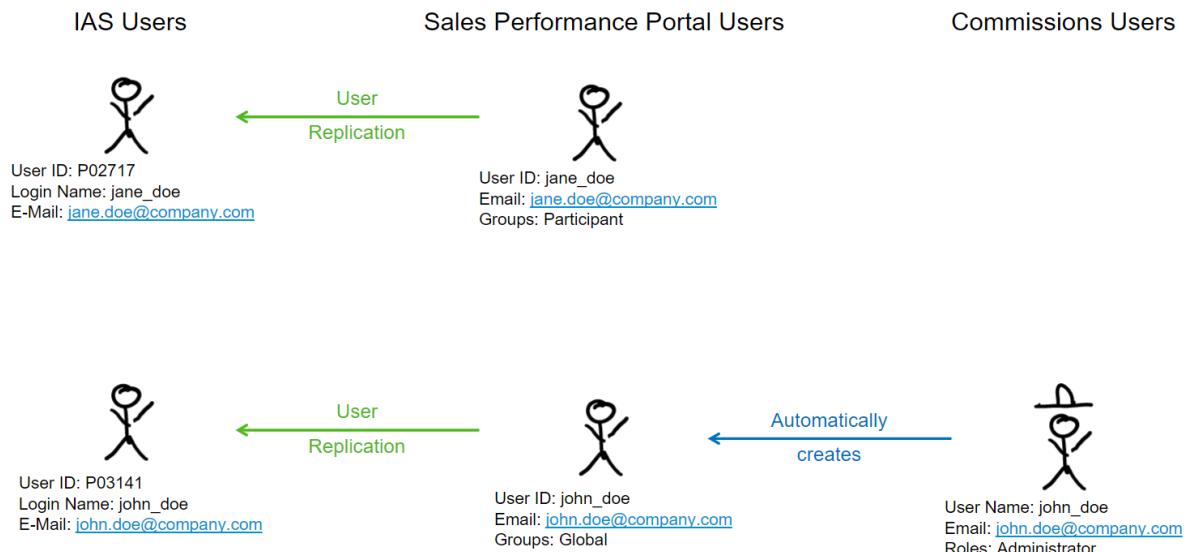
26.4.1.2 Sample Integration Scenarios and Configuration Details

This topic lists some sample integration scenarios between Commissions and the Identity Authentication service with the required configuration details.

Scenario 1: Single-Sign-On via Identity Authentication for All Commissions Users

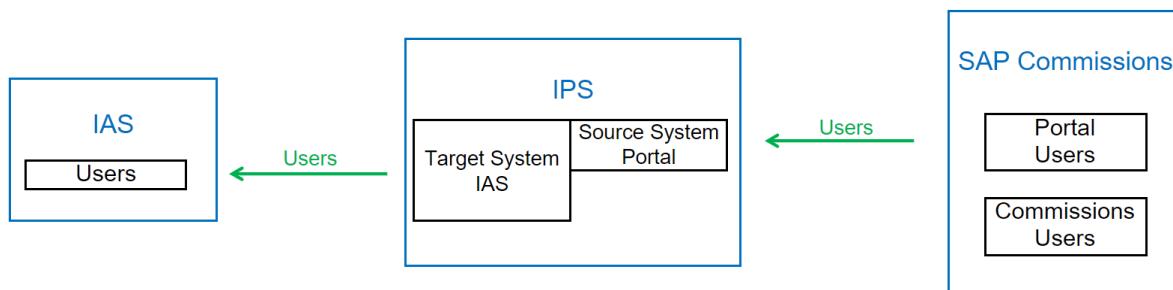
To enable Single-Sign-On via Identity Authentication for all Commissions Users, it is sufficient to replicate the Portal users. Replication of Commissions Users is not required. Replication of user to group/role assignments is also not required.

Replication of Portal Users



The setup in Identity Provisioning for this replication is as follows:

Configuration to Replicate Portal Users



We need one source system in Identity Provisioning for Commissions Portal that reads the Portal users and one target system for Identity Authentication to replicate the users into Identity Authentication.

Scenario 2: Enable Multi Factor Authentication for All Commissions Users

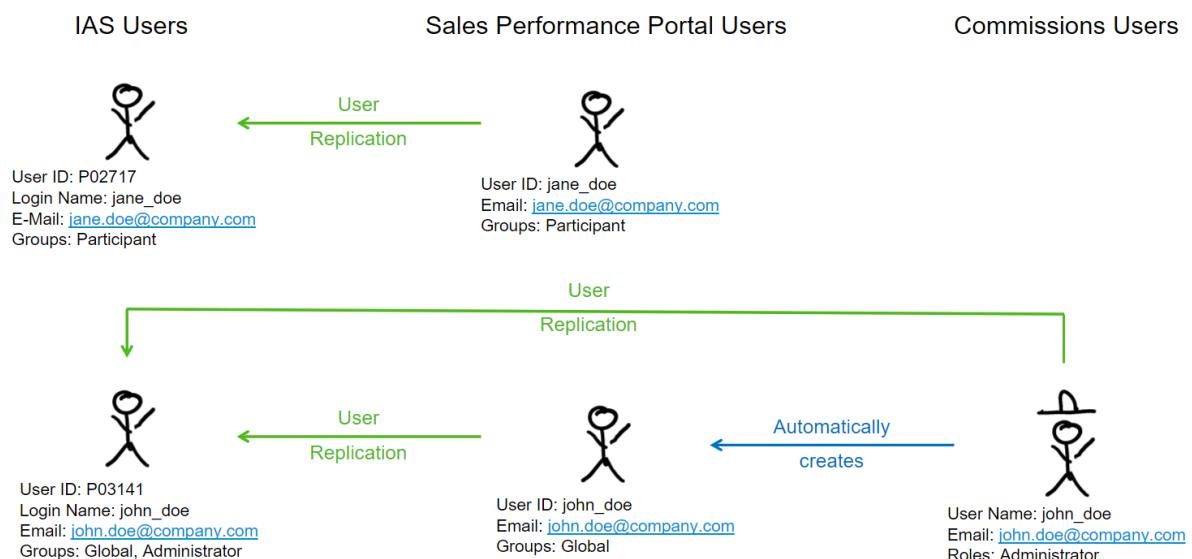
For this scenario, the user replication setup is the same as described in the **Scenario 1** above. The configuration of Multi Factor Authentication is done completely in Identity Authentication. See [Configure Risk-Based Authentication for an Application](#) for details on how to configure MFA in Identity Authentication.

Scenario 3: Enable Multi Factor Authentication for Commissions Administration Users

Let's assume the goal is to enforce MFA for Commissions Administration Users but not for all users, e.g. not for participants. Identity Authentication supports this case via "risk-based authentication". One can define a rule that all users with the role "Administrator" need to present a second factor when logging in.

The user replication will now look like this:

Replication of Portal and Commissions Users and Groups



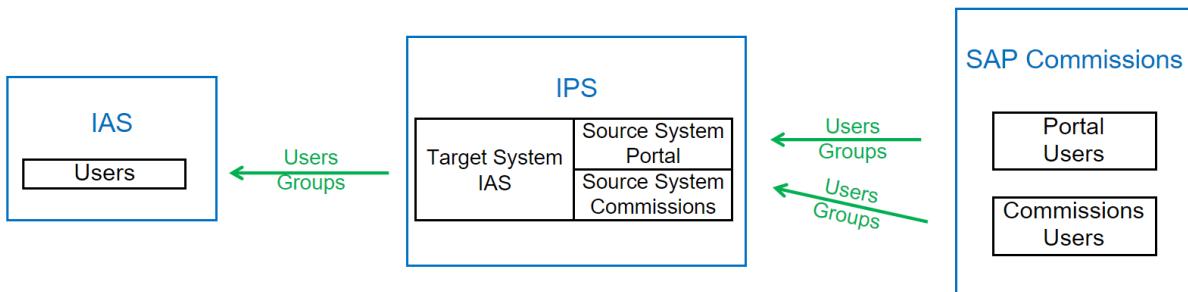
Additionally:

- Commissions User information is replicated
- Role/Group assignment both for the Portal user and the Commissions User are replicated and available in Identity Authentication.

Identity Authentication would decide, for example, based on the group "Administrator" that the user has presented a second factor to authenticate. Therefore, Identity Authentication needs to be aware of the group assignments done in Commissions.

The Identity Provisioning setup required for this scenario is as follows:

Configuration to Replicate Portal and Commissions Users and Groups



One needs an additional source system on Identity Provisioning for the Commissions Users. It is linked to the same target system for Identity Authentication. The SCIM standard defines two resources, Users and Groups. For this scenario, both resources Users and Groups are needed.

See [Configuration to Replicate Portal Users \[page 395\]](#) and [Configuration to Replicate Administration Users \[page 397\]](#) for details on configuring **User Replication** for the different scenarios that are illustrated in this topic.

26.4.1.3 Configuration to Replicate Portal Users

Configuration in SAP Commissions

Create a user in Portal user management with role as *Portal Admin*, then set *Authentication Type* to *Basic Authentication*, and set a password. Identity Provisioning will call the SAP Commissions SCIM API with this user.

i Note

- It is recommended to create a separate user for this integration instead of reusing an existing one. A separate user would mean better separation of concerns and better traceability in case of issues.
- As soon as Identity Provisioning supports Mutual TLS as authentication method (at the time of writing this document, it was not), it is recommended to use Mutual TLS as Authentication Type.

Configuration in Identity Provisioning

Source System for SAP Sales Performance Portal

The SAP Note 2999357 - SAP Commissions Bottom-Up Integration with SAP Identity Authentication - SAP ONE Support Launchpad  contains a sample configuration for the source system that one can upload to Identity Provisioning. Please download the attachment `Bottom-Up-Source-SAP-Commissions-Portal-v3.json`. The provided configuration is a recommendation and is optional to use.

The type of the source system to be created is **SCIM System**. Refer to the related Identity Provisioning documentation in: [SCIM System](#) and [Add a System](#).

i Note

Do not use the existing System Type "SAP Commissions"! This system type only works with an older version of the SAP Commissions SCIM API.

On the Source System Creation page, select the **Define from File** option and upload the file `Bottom-Up-Source-SAP-Commissions-Portal-V3.json` here. The source system is now populated with the values from this file. Then, perform the following changes:

Tab Details

Provide a system name.

Tab Transformations

In case you don't require groups and user to group assignments to be transferred, you can discard them using the transformation expression "ignore" as explained in [Transformation Expressions](#).

Tab Properties

Set these properties:

| Property Name | Value | Comment |
|--|---|---|
| <code>ips.trace.failed.entity.content</code> | true | Both values true and false are possible. Value true gives you better analysis options in case of errors. A potential setup is, for e.g., to use true in the Test environment and false in Production. |
| Password | < Password assigned in Portal> | Enter the password you assigned the Portal user. |
| URL | <code>https://<SAP Commissions Tenant URL>/CallidusPortal/services/v3/scim</code> | Replace <SAP Commissions Tenant URL> with the URL of your Commissions tenant. |
| User | < Portal user id of the user created above > | Enter the Portal user name created before. |

Target System for SAP Identity Authentication

Create a target system for SAP Identity Authentication if not already there. See [Identity Authentication](#).

The SAP Note 2999357 - SAP Commissions Bottom-Up Integration with SAP Identity Authentication - SAP ONE Support Launchpad  contains a sample configuration for the target system that one can upload to Identity Provisioning. Please download the attachment `Bottom-Up-Target-SAP-IAS-V3.json`. The provided configuration is just a proposal. It is optional to use it.

On the Target System Creation page, use the *Define from File* option and upload the file `Bottom-Up-Target-SAP-IAS-V3.json` here. The target system is now populated with the values from this file. Then, perform the following changes:

Tab Details

Provide a system name.

Add the source system for SAP Sales Performance Portal that you created in “Source Systems”.

Tab Properties

Set the properties as described in [Identity Authentication](#).

26.4.1.4 Configuration to Replicate Administration Users

Configuration in SAP Commissions

Create a user in the Commissions user management with role [Administrator](#), then set the [Authentication Type](#) to [Basic Authentication](#), and set a password. Identity Provisioning will call the SAP Commissions SCIM API with this user.

i Note

- The recommendation is to create a separate user for this integration instead of reusing an existing one. A separate user would mean better separation of concerns and better traceability in case of issues.
- As soon as Identity Provisioning supports Mutual TLS as authentication method (at the time of writing this document, it was not), it is recommended to use Mutual TLS as Authentication Type.

Configuration in Identity Provisioning

Source System for SAP Commissions

The [SAP Note 2999357 - SAP Commissions Bottom-Up Integration with SAP Identity Authentication - SAP ONE Support Launchpad](#) contains a sample configuration for the source system that one can upload to Identity Provisioning. Please download the attachment `Bottom-Up-Source-SAP-Commissions-Admin-v3.json`. The provided configuration is a recommendation and is optional to use.

The type of the source system to be created is [SCIM System](#). See related Identity Provisioning documentation here: [SCIM System](#) and [Add a System](#).

On the Source System Creation page, use the option *Define from File* and upload the file `Bottom-Up-Source-SAP-Commissions-Admin-V3.json` here. The source system is now populated with the values from this file. Later, perform the following changes:

Tab Details

Provide a system name.

Tab Transformations

In case you don't require groups and user to group assignments to be transferred, you can discard them using the transformation expression "ignore" as explained in [Transformation Expressions](#).

Tab Properties

Set these properties:

| Property Name | Value | Comment |
|---------------------------------|--|---|
| ips.trace.failed.entity.content | true | Both values true and false are possible. Value true gives you better analysis options in case of errors. A potential setup is, for e.g., to use true in the Test environment and false in Production. |
| Password | < Password assigned in Commissions > | Enter the password you assigned the Commissions user. |
| URL | https://<SAP Commissions Tenant URL>/ TrueComp-SaaS/services/v3/scim | Replace <Commissions Tenant URL> with the URL of your Commissions tenant. |
| User | < Commissions user id of the user created above > | Enter the Commissions user name created before. |

Target System for SAP Identity Authentication

Please reuse the target system defined above. Add the source system for SAP Commissions in "Source Systems" in the Details tab.

26.4.1.5 Initial Load of Users / Periodic Transfer of Users

To initially load all relevant SAP Commissions user records into Identity Authentication, go to the tab [Jobs](#) in the Identity Provisioning system and run a read job as explained in [Start and Stop Provisioning Jobs](#). Check the job logs as explained in [Manage Provisioning Job Logs](#).

You can schedule a periodic job for the ongoing automatic transfer of user changes from SAP Commissions to Identity Authentication. One can receive E-Mail alerts in case of errors.

You need to execute these activities for each source system.

26.4.1.6 Additional Information

This topic provides additional notes about Bottom-Up User Synchronization.

- In release 2012 Group Assignments for Portal users are NOT transferred from SAP Commissions to Identity Authentication. Group Assignments for Commissions users are correctly transferred.
- Commissions group ids are case-sensitive. For Example: COMM_ADMIN_1 and comm_admin_1 can exist in parallel in SAP Commissions. Identity Authentication does not support this and raises an error when two such groups are transferred from SAP Commissions.

- In Commissions several users with one and the same E-Mail address can exist. In Identity Authentication this is configurable. See [Configure Allowed Logon Identifiers](#). If Identity Authentication uses unique E-Mail addresses, Identity Authentication raises an error in case two users with the same E-Mail are transferred from SAP Commissions.
- This integration relies on a new version of the SCIM APIs, V3 that was added in release 2012. The OpenAPI specifications for these APIs are attached to the [SAP Note 2999357 - SAP Commissions Bottom-Up Integration with SAP Identity Authentication](#) and will be published on the SAP API business hub in a later release.

26.4.2 Top-Down User Synchronization

In the top-down user synchronization approach, users are created in the Identity Authentication application and pushed to SAP Commissions, using the Identity Provisioning application. In this process you can create users who belong to the following user groups:

- Participants
- Approvers
- Managers
- Administrators

26.4.2.1 Creating a Participant User Using the Top-Down Process

Participant records and the user records in SAP Commissions are separate records. They are linked by the user id (field name “User Name” in the Participant UI).

The [Identity Authentication > SAP Commissions](#) integration only creates Sales Performance Portal user records in SAP Commissions, not full-blown Participant records.

Participant records need to be created separately. They can be created in the UI, via the REST API or via file upload.

It doesn't matter if the Participant record is created first or if the user record is created first.

For example, when SAP Commissions Participant is created first:

1. A participant with participant id “Jane_Doe” is created. The user name is set to “jane_doe”.
2. The system automatically creates a Sales Performance Portal user with user id “jane_doe”.
3. A user “jane_doe” is created in Identity Authentication.
4. The Identity Authentication user is replicated from Identity Authentication to SAP Commissions. In SAP Commissions the existing Sales Performance Portal User “jane_doe” is updated with the data sent by Identity Authentication.

For example, when Identity Authentication User is created first:

1. A user “jane_doe” is created in Identity Authentication.
2. The Identity Authentication user is replicated to SAP Commissions. In SAP Commissions a new Sales Performance Portal User “jane_doe” is created with the data sent by Identity Authentication.

3. A participant with participant id “Jane_Doe” is created. The user name is set to “jane_doe”.
4. The system updates the existing user “jane_doe” with the user relevant information from the Participant record.

Procedure:

1. Log into Identity Authentication.
2. In the *User & Authorization* workspace choose *User Management*.
3. Click the *Add User* button.
4. Enter the following values:
 - First Name
 - Last Name
 - E-Mail
 - Login Name
 - User Type
5. Set the *Account Activation* to *Send activation email*.
6. Click the *Save* button.
7. Select the user that you created and click the *User Group* icon.
8. Click *Assign Group*.
9. Add the user to the COMM app and select the *Participant-COMM* group for the user and click *Save*.

The next part of the user creation process is conducted in the Identity Provisioning application. These steps are only relevant if there is no scheduled read job in Identity Provisioning that periodically replicates users from Identity Authentication to SAP Commissions.

1. Log into Identity Provisioning.
2. Go to *Source System* for Identity Authentication.
3. Go to the *Jobs* tab.
4. Run *Resync Job* in order to sync the user.

Log into SAP Commissions to verify that the participant user is successfully created.

Result: The Sales Performance Portal Participant User is now successfully added to SAP Commissions.

26.4.2.2 Creating an Administrator Using the Top-Down Process

Procedure:

1. Log into Identity Authentication.
2. In the *User & Authorization* workspace choose *User Management*.
3. Click the *Add User* button.
4. Enter the following values:
 - First Name
 - Last Name
 - E-Mail
 - Login Name
 - User Type

5. Set the *Account Activation* to *Send activation email*.
6. Click the *Save* button.
7. Select the user that you created and click the *User Group* icon.
8. Click *Assign Group*.
9. Add the user to the COMM app and select the Administrator-COMM group for the user and click *Save*.

The next part of the user creation process is conducted in the Identity Provisioning application.

1. Log into Identity Provisioning.
2. In the **Subaccounts** workspace locate your environment.
3. Go to ► *Services* ► *Identity Provisioning* ▶.
4. Click *Go to Service*.
5. Go to *Source System* > *Commissions* > **Jobs**.
6. Run *Resync Job* in order to sync the user.
7. Log into SAP Commissions to verify that the administrator user is successfully created.

Result: The administrator user is now successfully added to SAP Commissions.

26.4.2.3 Creating a Manager User Group Using the Top-Down Process

Procedure:

1. Log into Identity Authentication.
2. In the *User & Authorization* workspace choose *User Management*.
3. Click the *Add User* button.
4. Enter the following values:
 - First Name
 - Last Name
 - E-Mail
 - Login Name
 - User Type
5. Set the *Account Activation* to *Send activation email*.
6. Click the *Save* button.
7. Select the user that you created and click the *User Group* icon.
8. Click *Assign Group*.
9. Add the user to the COMM app and select the Manager-COMM group for the user and click *Save*.

The next part of the user creation process is conducted in the Identity Provisioning application.

1. Log into Identity Provisioning.
2. In the **Subaccounts** workspace locate your environment.
3. Go to ► *Services* ► *Identity Provisioning* ▶.
4. Click *Go to Service*.
5. Go to ► *Source System* > *Commissions* > **Jobs** ▶▶.
6. Run *Resync Job* in order to sync the user.

7. Log into SAP Commissions to verify that the user from the manager user is successfully created.

Result: The user from the manager user group is now successfully added to SAP Commissions.

26.4.2.4 Creating an Approver User Group Using the Top-Down Process

Procedure:

1. Log into Identity Authentication.
2. In the *User & Authorization* workspace choose *User Management*.
3. Click the *Add User* button.
4. Enter the following values:
 - First Name
 - Last Name
 - E-Mail
 - Login Name
 - User Type
5. Set the *Account Activation* to *Send activation email*.
6. Click the *Save* button.
7. Select the user that you created and click the *User Group* icon.
8. Click *Assign Group*.
9. Add the user to the COMM app and select the Approver-COMM group for the user and click *Save*.

The next part of the user creation process is conducted in the Identity Provisioning application.

1. Log into Identity Provisioning.
2. In the *Subaccounts* workspace, locate your environment.
3. Go to ► *Services* ► *Identity Provisioning* ▶.
4. Click *Go to Service*.
5. Go to ► *Source System* ► *Commissions* ► *Jobs* ▶.
6. Run *Resync Job* in order to sync the user.
7. Log into SAP Commissions to verify that the user from the approver user is successfully created.

Result: The user from the approver user group is now successfully added to SAP Commissions.

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