Pricefx Accelerators

Accelerate Sales Compensation 1.0.0

January 2022

Accelerate Sales Compensation (SC)

The Sales Compensation Accelerator provides a solution for fast implementation of the company's sales compensation plan.

The package includes:

- Common compensation types
- Approval workflow for compensation agreements, agreement records and payout values
- Output templates for documents like Sales Compensation Agreement, configuration overview and progress reports
- Dashboards with information about progress towards the plan
- Dedicated views for compensation agreements and agreement records

In this section:

Search for configuration, manuals or reference information.

Search

Product Info (SC)

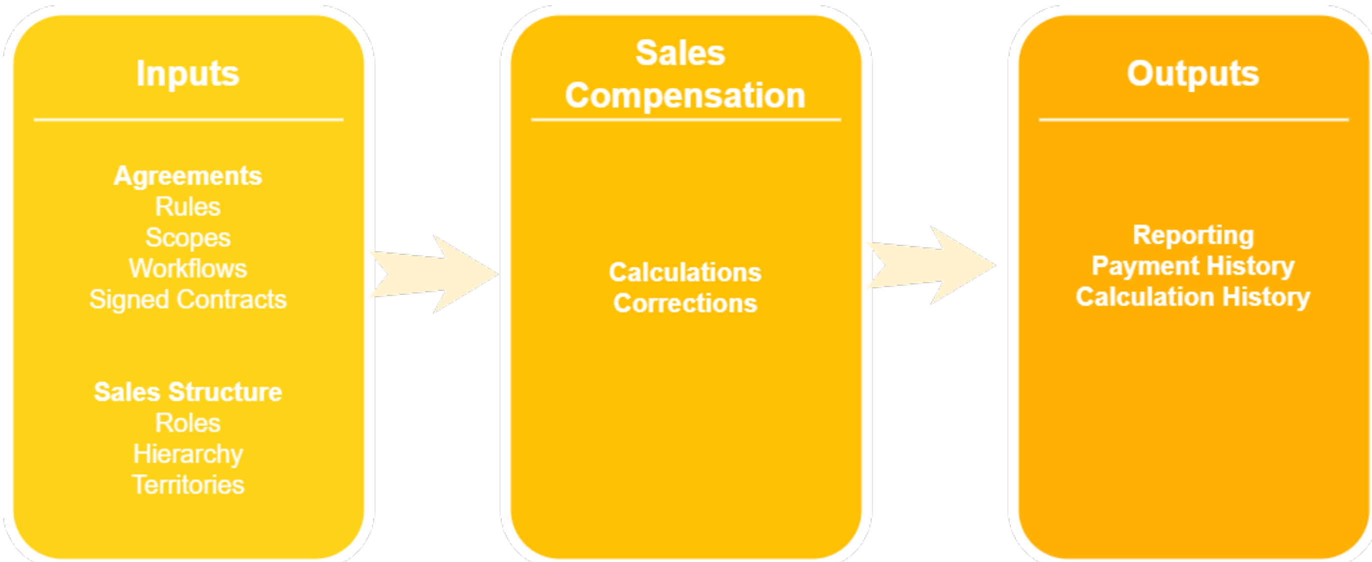
The Sales Compensation Package provides a solution for the fast implementation of the company's sales compensation plan. Its purpose is to maintain, control and evaluate execution with the Pricefx application.

In this section you will find:

Sale Compensation Plan

It outlines the sales agent's base salary as well as the company's commission and incentive program with strategy. Commission, bonus, and incentive structure incentivize sales force to reach their objectives in order to earn a deserved reward. Final pay mix together makes up On-Target Earnings. In other words, the amount of money a salesperson is paid in the end.

Sales compensations encourage positive behaviors in your sales teams that are necessary to achieve your overall organizational goals and results.



Business Roles

The following business roles and individuals participate in the processes surrounding the Accelerator's usage activities.

Sales Compensation Administrator

A person who is responsible for the smooth working of all elements. This person takes the plan from the company's representatives and ensures that individual Sales Managers can create agreements. The person makes sure all salespeople are in the system and individual compensation types and calculation logics that the company uses are present in the system. Sales team changes, adjustments or running plans, contract revisions for a new cycle, or global reporting are activities in their agenda.

Typically, this person is from Finance or SalesOps department closely cooperating with Sales Managers, HR, and legal team.

Sales Manager

A person who is responsible for the actual creation of individual Compensation Agreements. The person enters conditions into agreements, negotiates details with Sales Agents, and is able to watch progress towards set goals. The Sales Manager also generates reports for those who are not able to access the system on their own. It could be an alternative name for Team Lead.

Sales Agent

A person who actually sells and is also the main recipient of compensations. It could be an alternative name for a Sales Representative, SalesRep, or Salesperson.

Scope of Usage

The Accelerator is a tool used in agendas of the above-mentioned roles. It helps them simplify, automatize, track or define compensation-related work tasks.

Creating Compensation Agreement

Compensation Agreement is one unit of the main Sales Compensation Plan. It can encapsulate one or more rules, conditions, exclusions, and time spans that are used for the calculation of the final sum for the payee. This definition can represent a legal contract.

Reporting Progress

Reporting is an activity that can be done on an agreement level or with a scope of several Sales Agents. Provided reports and dashboards are used for the analysis of the progress of the plan.

Plan Maintenance

Corrections of wrongly accounted transactions, new agreement revisions, definitions for a new period of a year, or replacements in the sales team are common activities associated with a well-defined plan.

Reporting and Dashboards

The ability to accurately track and compare progress towards defined goals is an important aspect of successful strategy execution. The package is distributed with a dashboard and set of reports supporting those processes.

Compensation Dashboard

Interactive reporting in dashboards is used for a deeper understanding of compensation agreements.

Users are restricted to see data of their subordinates and their own. You can read more on Dashboards Description (SC).

Overview Report

A document summarizing definitions of an agreement with results for each agreement line and total compensation value. This is the one-pager for the agreement in numbers.

YTD Report

It is a simple document showing agreement progress in the current calendar year. It goes into fewer details about each agreement line but focuses on results for the year.

Transaction List

This report is used for checking all transactions that are included in the calculation of the selected compensation agreement.

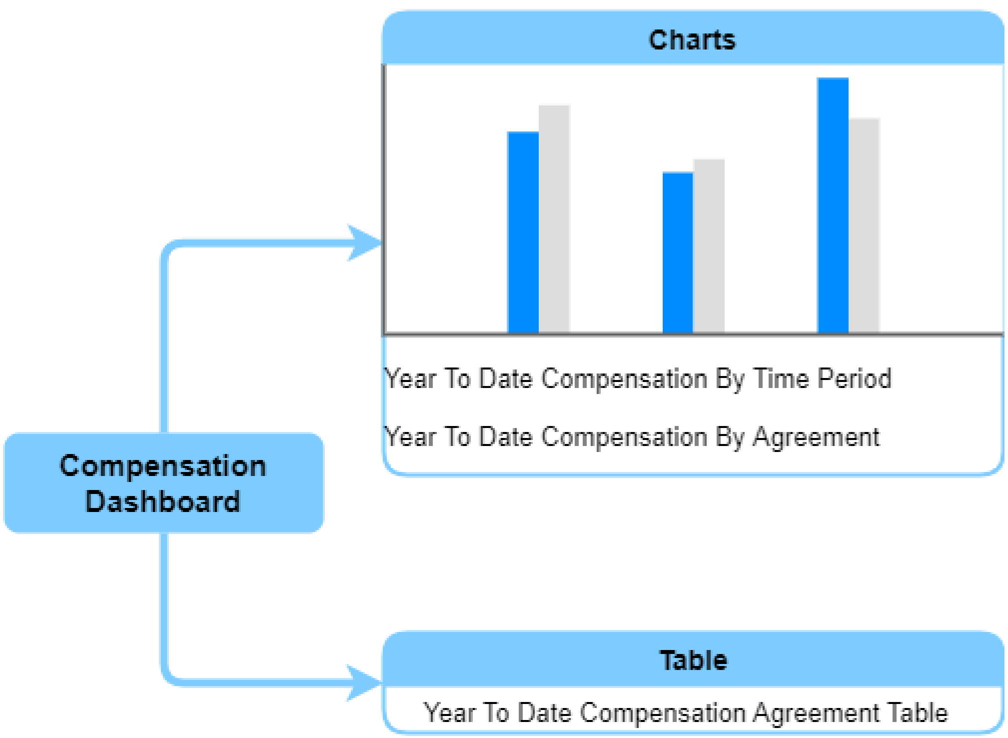
It can be used as an audit supporting tool or document generated when an agreement is fulfilled, see example SC_Transaction_List_Report_SAMPLE.pdf.

Dashboards Description (SC)

The section provides an overview of dashboards and their portlets. It lists filter inputs and describes their effect on portlets.

Overview

Sales Compensation has one dashboard which provides a progress overview for individual sales agents for the current year.



Analysis

Description of portlets with an explanation of analysis that should be done for the graph or table.

Year To Date Compensation

A bar chart aggregating all compensations for the selected Sales Agent in time periods. If no specific Compensation Agreement was selected, one bar combines all Compensation Agreements together giving a total compensation sum which was paid out to the Sales Agent.

Be careful, 'Time Period' input provides an aggregation period, e. g. Quarterly would show increments only in 2 bars if the compensation had a semi-annual payment period.

Year To Date Compensation By Agreement

A bar chart showing the total sum of all compensations in one agreement as a bar on the X-axis. The graph is more impactful for visualization of differences between more Compensation Agreements.

Year To Date Compensation Agreement Table

A summary table showing the breakup of Compensation Agreements through Line Items down to Agreement Records in a single table. A user is able to see which lines or periods are outliers.

User Inputs

Table describing inputs and their values for data filter.

Input Filter Name	Values	Notes
Seller	One Sales Agent	• Mandatory field • 'Compensation Agreement' input is affected by the selected value.
Compensation Agreement	Empty or one specific agreement	• Empty value compares all agreements that are assigned to the agent from the Seller input.
Time Period	Monthly, Quarterly, Semi-Annually, Annually	• Sets an aggregation period for the 'Year To Date Compensation' portlet.

Get Started (SC)

- Installation (SC)
- Configuration (SC)

Installation (SC)

This tutorial will guide you through the installation of the Sales Compensation Accelerator.

In this section:

Pre-requisites

Before you start, ensure that you have:

- Access to a partition on the Pricefx server (8.0 or newer). You will need:
  - Server URL
  - Partition name
  - Username and password for a partition user with sufficient rights for using the Accelerator
  - License on the partition must cover the Analytics and Rebates modules
- Access to Pricefx PlatformManager
  - Username and password for PlatformManager user
  - The user must have the following permissions for your partition (to which you plan to deploy the Accelerator):
    - Permission *Marketplace Templates - deploy*
- Transaction data in the Datamart structure with required fields containing the following data:

Requirement description	Deployment label
The field name of a Value Base field is used to calculate the base value. In most cases, it will be a revenue, margin or gross margin field.	Baseline Value
The field name contains an identification of a sales agent.	Seller Id
The field name contains a customer ID in the Datamart.	Customer Id
The field name contains a product ID in the Datamart.	Product Id
The field name contains a product name. It is used for the *Transaction List* report only.	Product Name
The field name contains a pricing date in the Datamart.	Pricing Date
The field contains the main Datamart currency.	Currency

The package contains several components and their technical description is provided on the Components (SC) page.

Installation Steps

Select Partition for Deployment

1. In PlatformManager, navigate to **Marketplace > Accelerator Packages**, find the *Sales Compensation.*
2. Click **Deploy** and select a partition to which you want to deploy the package.
3. Click **Deploy**.
4. A warning dialogue will appear. After you read the warning text and you agree with the conditions, you can click **Continue**.
   If you need to leave the deployment process before it is finished, you can always come back later. The wizard will offer you to either start again, or continue in the previously started process.
5. Set up datamart mapping of required fileds from datamart and default values for a few parameters.

Settings

Datamart

SC_TransactionData

Customer Id

Customer Id

Product Id

Product Id

Seller Id

Seller Id

Baseline Value

Gross Margin

Pricing Date

Pricing Date

Currency

Currency

Product Name

ProductName

Payout Days

30

Payment Period

Quarterly

Target For

Payment Period

Deposit Scheme

Non-Cumulative

6. The deployment is complete. Go to your partition and continue with the manual steps required after deployment.

Post-installation Steps

After the package is deployed to your partition and all automatic installation steps are done, you need to do a few manual tasks before you start with configuration and package adjustments to your specific business needs.

Adjust Sellers Master table filed labels

Sellers Master table is used for keeping sales personnel structure together with additional context information.

Changing labels will simplify the work of administrative workers who will not be forced to remember which attribute was used for which purpose.

1. From the **Master Data** menu go to the **Sellers** section.
2. Update fields according to the table from the Components (SC) | Sellers Attributes.

Enable React UI

The package is designed to work with the latest UI engine in the RebateManager module. For proper functionality is necessary to enable it manually.

1. From the **Administration** menu go to the **Feature Flags** section.
2. Activate the following Feature Flags:
   `dashboard.useReactDashboard`
   `useReactFor.advancedFilter`
   `useReactFor.rebateAgreementList`
   `useReactFor.rebateAgreementDetail`
3. Log out and log back in for the changes to take effect.

Change Names and Application Texts

The package is a modification set of the RebateManager module and it adds a new functionality on top of the original rebates. For better convenience of users, it is recommended to update application texts and names with a prepared file.

SC_internationalization-8.0.0.xlsx

1. From the **Administration** menu go to the System **Configuration** section.
2. Switch to **Internationalization**.
3. Ensure you are on the Partition-wide tab.
4. Click the **Import** button and follow instructions with the provided ‘SC_internationalization.xlsx’ file.
5. Adjust other texts according to your specifications.
6. Click **Save** and confirm changes.
7. Log out and log back in for the changes to take effect.

You can find more information about application text changes in the Pricefx documentation: Internationalization.

Upload Publishing Templates

The package offers prepared templates for reporting and legal document drafts.

> ⚠ Templates need to be manually uploaded to your partition if the Rebate Manager accelerator was installed or updated after this accelerator. The same aplies in the oposite direction.

1. Download DOCX template files at https://gitlab.pricefx.eu/accelerators/sales-compensation-accelerator/-/tree/master/PublishingTemplate and store them.
   - You will need them in the seventh step.
   - ⚠ Access to the repository is restricted. You may request necessary files through support channels.
2. From the **Administration** menu go to the System **Configuration** section.
3. Switch to **Publishing Templates**.
4. From the picker select ‘Rebate & Compensation Agreements’ (‘Rebate Agreements’ for default application names).
5. Click Add for adding a new template.
6. Enter information from the table below. Each line represents a template.
7. Click the Upload Template button to upload the template file.
8. Choose the template file which is mentioned in the last column.
9. Select Upload to import the file.
10. Repeat steps 4 to 8 for all remaining templates.

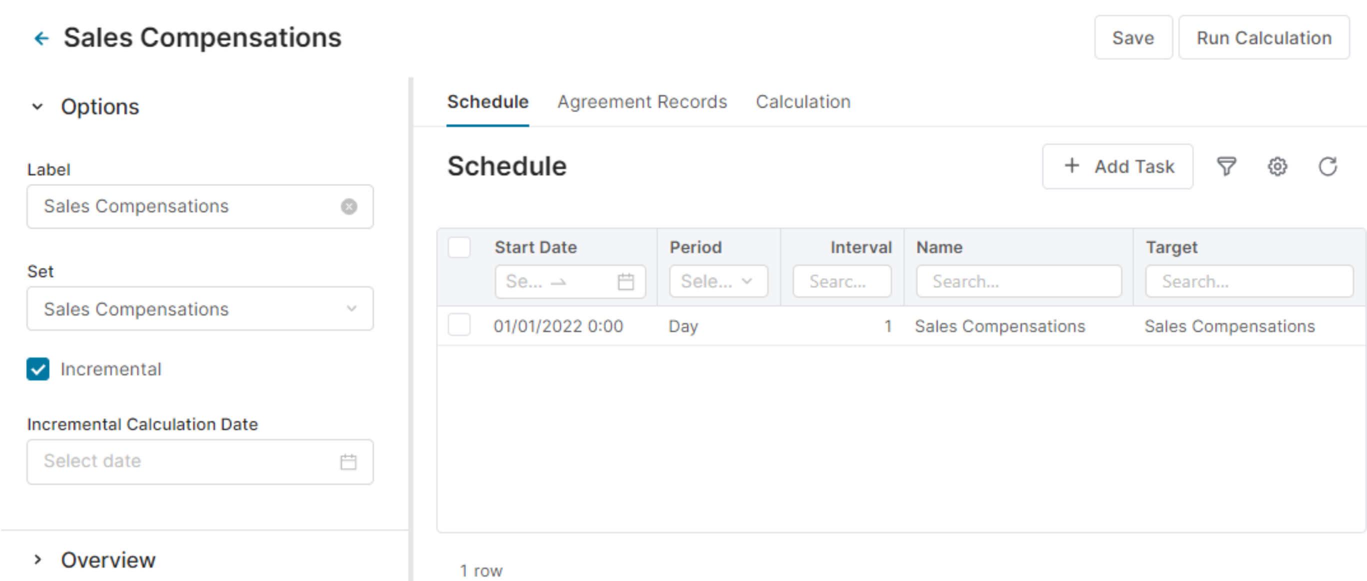
Name	Convertible to PDF	Preprocessing Logic	Template File Name
[SC] Sales Compensation Agreement	✔	SC_SalesCompensationAgreementReport	publishingTemplates_RBA_[SC] Sales Compensation Agreement.docx

[SC] Overview Report	✓	SC_OverviewReport	publishingTemplates_RBA_[SC] Overview Report.docx
[SC] Transaction List	✓	SC_TransactionsReport	publishingTemplates_RBA_[SC] Transaction List.docx
[SC] YTD Report	✓	SC_YTDReport	publishingTemplates_RBA_[SC] YTD Report.docx

Schedule Calculation Task

Agreement records need to be calculated in regular intervals. In this step, you will create a task for the calculation scheduler.

1. Go to **Rebates & Compensations** > **Calculations**.
2. Add a new calculation.
3. Enter a label, e.g. 'SC_Calculation'.
4. Select a set 'Sales Compensations' and click the **Add** button.
5. Click the label of the newly added line.
6. Go to the Calculation tab.
7. As Feeder Formula choose 'SC_CompensationRecordClaculationFeeder'.
8. (optional) Enter StartDate and EndDate.
    - Leave empty unless the need to calculate some specific time frame.
9. Click **Save** in the left upper corner.
10. Enable **Incremental** calculation on the left side of your screen.
11. Schedule, a calculating task according to your data, e.g. daily.
12. In the Overview, you can schedule this job to run at a suitable interval.



Assign Access to Users

The package comes with three predefined business roles which speed up configuration. You can adjust their default configuration and assign them to the users who have access to the system.

A detailed description of role definitions and their meaning is described in Product Info (SC) | Business roles.

1. From the **Administration** menu go to the **Access Admin > Business Roles Admin** section.

2. Check if all roles with the '[SC] ' prefix correspond with your expectations for minimal access and adjust them to your use cases.
3. Assign user accounts to their business roles from the Users tab of each role.

At this point, you completed the installation. Now, you should configure the package for specific business needs and get familiar with its use. The last thing to consider is the integration with a system that processes output compensations.

Configuration (SC)

This tutorial will guide you through the configuration steps. After you have completed the installation, you can start with the configuration of the Sales Compensation (SC) Accelerator. You can customize the default configuration, extend types or remove those that are not needed.

In this section:

Global Package Configuration

The global configuration data for the package are stored in an element of Advanced Configuration Options. Many of those parameters can be overridden on the Condition Type.

1. From the **Administration** menu go to the System **Configuration** section.
2. Switch to **Advanced Configuration Options**.
3. Search for the `SC_AcceleratorConfig` element where you can adjust the parameters listed below.
4. Adjust configuration keys according to your specifications.

A list of all parameters, their descriptions, possible values, and other notes are in Components (SC) | Advanced Configuration Options.

Sample of 'SC_CompensationConfig':

```
{
  "datamartName": "SC_TransactionData",
  "datamartBaselineFieldName": "GrossMargin",
  "datamartSellerIDFieldName": "SellerId",
  "datamartCustomerIDFieldName": "CustomerId",
```

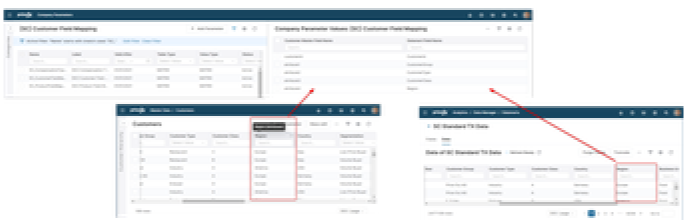
```
    "datamartProductIDFieldName": "ProductId",
    "datamartProductNameFieldName": "ProductName",
    "datamartPricingDateFieldName": "PricingDate",
    "datamartCurrencyFieldName" : "Currency",
    "payoutDays": 30,
    "paymentPeriod": "Quarterly",
    "targetFor": "Annual",
    "depositScheme": "Non-Cumulative"
  }
```

Company Parameters

To be able to apply a Customer filter input and Product filter input in a compensation agreement, you need to update the mapping fields between Product/Customer master and Datamart fields.

Based on the Datamart structure and Product/Customer master in your partition, you need to update or add more mapping in two Company Parameters:

- SC_CustomerFieldMapping
- SC_ProductFieldMapping



Agreement Header Types

The package is deployed with a single header and does not require any action.

How to Set a Default

The Rebates module hosts two functionalities but only one logic can be the default.

1. From the **Administration** menu go to the **Logics** section.
2. Switch to **Header Logics** > **Rebate & Compensation Agreements** (‘Rebate Agreements’ for default application names).
3. Select a new value in the ‘Default Rebate & Compensation Agreement Header logic’ dropdown (‘Default RA Header logic’ for default application names).
4. Confirm the dialogue by clicking the OK button.
5. Go to **Rebates & Compensations > Agreement Header Types** and follow customized steps on the first (default) line.
    - If you have just one Header Type, you can delete the original and keep just a default line. Users will then skip one selection step while creating a new compensation agreement.

How to Customize Your Types

1. Go to **Rebates & Compensations** > **Agreement Header Types**.
2. Look for items with the ‘Sales Compensation Header’ type.
3. Select the line you want to edit.
4. Click the Edit button to open the customization dialogue.

5. Adjust parameters according to your needs by replacing default values with custom logic.
6. Click Save Changes to save and confirm changes.

A list of all parameters, their descriptions, possible values, and other notes are in Components (SC).

Sample of the 'Agreement Header Type' which is deployed with the package:

```
Name (uniqueName): [SC] Sales Compensation
Header Logic (headerFormulaName): Sales Compensation Header
Agreement Workflow (workflowFormulaName): [SC] Sales Compensation
Agreement
Agreement Record Workflow (recordWorkflowFormulaName): [SC] Agreement
Record
Filtering logic (rebateTypeFilterFormulaName): SC_ConditionTypeFilter
```

Condition Types

This chapter describes procedures for manipulation with LineItem elements which are primary blocks of calculation for compensations inside the individual agreement.

How to Customize Your Types

1. Go to **Rebates & Compensations** > **Condition Types**.
2. Look for items with the 'Compensation Logic' in the 'Pricing Logic (formulaName)' column.
3. Select the line you want to edit.
4. Click the Edit button to open the customization dialogue.
5. Adjust parameters according to your needs by replacing default values with custom ones.
6. Click Save Changes to confirm changes.

How to Add a New Type

1. Go to **Rebates & Compensations** > **Condition Types**.
2. Click 'Add Condition Type' and a configuration dialogue will open.
3. Fill in fields you want to have specifically defined in the condition type.
    - ⚠️ Be aware, parameters can inherit default values from Advanced Configuration Options. Empty field means the parameter inherits a value.
    - "Condition Type Name" shows a list of Rebate Manager and Sales Compensation types. Options compatible with this package are listed in Type Overview (SC) | Condition Types.
4. Click Add to save your new type.

A list of all parameters, their descriptions, inheritance, possible values, and other notes are in section Components (SC) | Condition Type Attributes.

Adjust Publishing Templates

In this step, you can customize document templates. Typically you may want to change the header, footer, and document design like fonts or some texts to comply with company graphical identity.

1. From the **Administration** menu go to the System **Configuration** section.
2. Switch to **Publishing Templates**.
3. From the picker select 'Rebate & Compensation Agreements' ('Rebate Agreements' for default application names).
4. Select a template you want to customize.

5. Click the Download Template button to download the source file.
    - Keep the line selected, you will continue from here.
6. Customize the downloaded file in an editor.
7. Back in a web browser, click the Upload Template button to upload the customized file.
8. Select Open to import the file.
9. Repeat steps 4 to 8 for templates you want to customize.

Define Approval Workflows

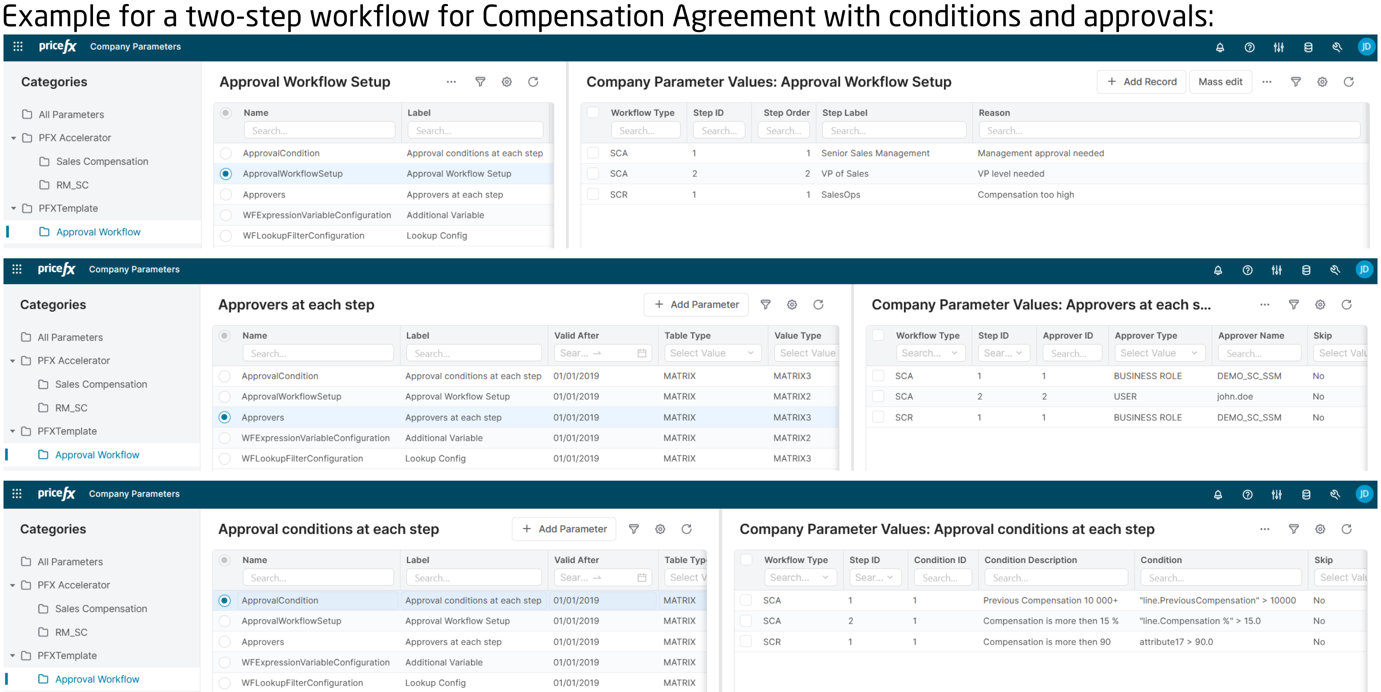
Two types of approval workflows can be configured to support business conditions and flow inside an organization. The installation package already deployed and configured workflow types (SCA and SCR) in Administration > Logics > Workflow Logics > General Workflow. You just need to convert your business rules to workflow parameters in Company Parameters.

Compensation Agreement Approval Workflow

In this step, you should configure workflow conditions for the Compensation Agreement. You will follow detailed steps from the manual for the Accelerate Approval Workflow Package (AWP) which is part of this package.

1. Go to **Company Parameters** in the top menu.
2. Locate PFXTemplate -> Approval Workflow.
3. Define workflow steps in the 'ApprovalWorkflowsSetup' parameter.
    - 'Workflow Type' must be *SCA*.
4. Define conditions in the 'ApprovalConditions' parameter.
    - The list of variables is on the Workflow Variables (SC) | Compensation Agreement approval workflows page.
5. Define approvals in the 'Approvers' parameter.
6. Test your workflow.
    - You don't need to submit an agreement to test it. Just recalculate and verify that the workflow is prepared to be triggered.

Example for a two-step workflow for Compensation Agreement with conditions and approvals:



Agreement Record Approval Workflow

This workflow type configuration is identical to the one above. It uses **SCR** as the 'Workflow Type'.

An example from the previous step shows one step workflow configuration. The list of variables is on the Workflow Variables (SC) | Agreement Record approval workflows page.

To check the approvals for Agreement Records, you must approve the Compensation Agreement first.

Reference (SC)

Type Overview (SC)

The section provides an overview and calculation examples for types that are distributed in the package.

Agreement Header Types

List of available types with information about input and outputs.

Name	Header Logic	Input	Payout	Description
[SC] Sales Compensation	[SC] Sales Compensation Agreement	Seller (single person)	Seller (single person)	Compensation is tracked for one Sales Agent who receives all payout money.

Condition Types

List of available types with their default setup. Below you will find how to modify the setup.

Type	Name	Classification	Target Type	Target Unit	Compensation Unit

Conditional	[SC] Single Target Amount	Maintain	Single	$	$
	[SC] Single Target Percent	Maintain	Single	$	%
Growth	[SC] Growth Absolute Amount	Growth	Multi	$	$
	[SC] Growth Absolute Percent	Growth	Multi	$	%
	[SC] Growth Percent Amount	Growth	Multi	%	$
	[SC] Growth Percent Percent	Growth	Multi	%	%
Stepped	[SC] Stepped Amount	Maintain	Multi	$	$
	[SC] Stepped Percent	Maintain	Multi	$	%

The dollar $ sign represents a currency in general, not an actual USD.

Calculation Examples

[SC] Single Target Amount

Inputs in the agreement:

- Target - $
- Compensation - $

Example

Target [input]	Compensation [input]	Base Line	Compensation [output]
$100,000	$1,000	$110,000	$1,000
$100,000	$1,000	$90,000	$0

[SC] Single Target Percent

Inputs in the agreement:

- Target - $
- Compensation Value - %

Example

Target [input]	Compensation Value [input]	Base Line	Compensation [output]
$100,000	1%	$110,000	$1,100

$100,000	1%	$90,000	$0

[SC] Growth Absolute Amount

Comparison to some previous period – Month, Quarter, Year, Custom.

Inputs in the agreement:

- Target(s) – $
- Compensation Value(s) – $

Example

Definition:

Target – Growth Tier	Compensation Value
$10,000	$100
$25,000	$300
$100,000	$10,000

Result:

Growth Base Line (Current – Previous)	Compensation
$5,000	$0
$30,000	$300
$150,000	$10,000

[SC] Growth Absolute Percent

Comparison to some previous period – Month, Quarter, Year, Custom.

Inputs in the agreement:

- Target(s) – $
- Compensation Value(s) – %

Example

Definition:

Target – Growth Tier	Compensation Value
$10,000	1%
$25,000	2%
$100,000	5%

Result:

Base Line	Compensation
$5,000	$0
$25,000	$500
$150,000	$7,500

[SC] Growth Percent Percent

Comparison to some previous period – Month, Quarter, Year, Custom.

Inputs in the agreement:

- Target(s) – %
- Compensation Value(s) – %

Example

Definition:

Target – Growth Tier %	Compensation Value
2%	1%
5%	3%
10%	5%

Result:

Base Line	Calculation Base Line	Compensation
1%	$10,000	$0
2%	$100,000	$1,000
11%	$100,000	$5,000

[SC] Growth Percent Amount

Comparison with some previous period – Month, Quarter, Year, Custom.

Inputs in the agreement:

- Target(s) – %
- Compensation Value(s) – $

Example

Definition:

Target – Growth Tier %	Compensation Value
2%	$1,000

5%	$10,000
10%	$25,000

Result:

Base Line	Compensation
1%	$0
2%	$1,000
11%	$25,000

[SC] Stepped Amount

Inputs in the agreement:

- Target(s) – $
- Compensation Value(s) – $

Example

Definition:

Target – Step	Compensation Value
$10,000	$100
$50,000	$500
$100,000	$5,000

Result:

Base Line	Compensation
$5,000	$0
$15,000	$100
$110,000	*$100 + $500 + $5,000* = $5,600

[SC] Stepped Percent

Inputs in the agreement:

- Target(s) – $
- Compensation Value(s) – %

Example

Definition:

Target – Step %	Compensation Value

$10000	1%
$50000	3%
$100000	10%

Result:

Base Line	Compensation
$5000	$0
$15000	$150
$110000	*($40,000 * 1%) + ($50,000 * 3%) + ($10,000 * 10%) = $400 + $1,500 + $1,000 =* $2,900

Agreement Records Calculation

Payout Value Calculation

The “Annual” target needs a Deposit Scheme. The scheme decides if the calculation is split by the number of periods in the target time span.

Input information:

- Condition Type: [SC] Single Target Amount
- Payment Period: Quarterly
- Target For: **Annual**

Target input:

- Target Input: 100,000.0
- Compensation Input: 1,000.0

As the payment period is each quarter, we have 4 agreement records with the following data:

Agreement (Rebate) Record	Period	Period Sale	Cumulative Sale
RR01	Q1	90,000	90,000
RR02	Q2	11,000	101,000
RR03	Q3	49,000	150,000
RR04	Q4	50,000	200,000

Non-Cumulative Example

The calculation is driven by following an execution pattern.

```
If ( Cumulative_Sale > Target_Input ) then
    Compensation_Value = Compensation_Input / 4
end
```

Note: Number 4 stands for a number of agreement records (Rebate Records without internalization applied).

Agreement (Rebate) Record	Period	Compensation Value
RR01	Q1	0
RR02	Q2	250
RR03	Q3	250
RR04	Q4	250

Cumulative Example

The calculation is driven by following an execution pattern.

```
If ( Cumulative Sale > Target_Input ) then
    Compensation_Value = ( Compensation_Input / 4 ) *
Current_Period_Index - Accrual
end
```

Notes:

- Number 4 stands for a number of agreement records (Rebate Records without application text changes).
- Current Period Index starts with 1.
- Accrual is the cumulative compensation.

Agreement Record	Period	Current Period Index	Accrual	Compensation Value
RR01	Q1	1	0	0
RR02	Q2	2	0	500
RR03	Q3	3	500	250
RR04	Q4	4	750	250

Components (SC)

On this page, you will find a technical description and a list of components used in the package.

Groovy Overview

Logics

Logic Name	Default Label	Description
SC_Compensation	[SC] Sales Compensation	This logic processes all compensation types. If you need to add more input/output elements for the compensation, add them in this logic.
SC_CompensationHeader	[SC] Header	Header logic for a personal compensations.
SC_CompensationRecordCalculationFeeder	[SC] Agreement Record Calculation Feeder	Finds and calculates agreement records.
SC_ConditionTypeFilter	[SC] Condition Type Filter	Filters only those condition types which are suitable for compensation agreement.
SC_Dashboard_Compensations	[SC] Compensation Dashboard	Input generation, portlet generation, data fetching, etc.
SC_Dashboard_Compensations_Configurator	[SC] Compensation Dashboard Configurator	Builds a Seller input for dashboards.
SC_OverviewReport	[SC] Overview Report	Logic supporting report of the same name.
SC_SalesCompensationAgreementReport	[SC] Sales Compensation Agreement Report	Logic supporting report of the same name.
SC_TransactionsReport	[SC] Transactions Report	Logic supporting report of the same name.

SC_YTDReport	[SC] Year To Date Report	Logic supporting report of the same name.

Libraries

Library Name	Default Label	Description
SC_Compensation ProcessingLib	[SC] Processing Library	Provides common functions used in the compensation package such as utilities for dates manipulation, inputs, record fetching, etc.
SC_Compensation TypesLib	[SC] Condition Type Library	Defines all compensation types. When you have a new condition type, add a new element to this library to define functions for this condition type.
SC_Compensation DashboardsLib	[SC] Dashboard Library	Provides common functions used in dashboards of the compensation package.
SharedLib		Provides common functions used in the compensation package. Provided by Shared Groovy Library dependency.
ApprovalWorkflow		Provides function for approval workflow logics. Provided by Approval Workflow Library dependency.
FormulaEvaluator		Used in Approval Workflow. Provided by Formula Evaluator Library dependency.
HighchartLibrary		Provides "Highcharts" functions used in dashboards. Provided by Dashboards Accelerator Library dependency.

Advanced Configuration Options

Package configuration is done from this central point in the system. Option values are configured mostly during a package deployment process and can be adjusted later. Some options can be overridden on a Condition Type or Line Item level where the lower level has a priority.
The following table shows a list of all configuration parameters stored in `SC_AcceleratorConfig`.

Name	Description	Condition Type overwritable
datamartName	Name of Datamart used to query and allocate the compensation value	
datamartBaselineFieldName	The field name of a Value Base field is used to calculate the base value. In most cases, it will be a revenue or margin field.	
datamartSellerIDFieldName	The field name contains an identification of a sales agent.	
datamartCustomerIDFieldName	The field name contains a customer ID in the Datamart.	

datamartProductIDFieldName	The field name contains a product ID in the Datamart.	
datamartProductNameFieldName	The field name contains a product name. It is used for the *Transaction List* report only.	
datamartPricingDateFieldName	The field name contains a pricing date in the Datamart.	
datamartCurrencyFieldName	The field contains the main Datamart currency.	
payoutDays	A number of days after the end date of the payment period when the payout happens. The parameter defines the default "Payout Days" for Condition Types that do not have it filled in directly.	✓
targetFor	The target defined on the line item is evaluated for each payment period (see *paymentPeriod*) or annually. The parameter defines the default "Target For" for Condition Types that do not have it filled in directly. Select one of these options: • **Payment Period** – Gets a base value for every period, then compares and calculates the compensation. • **Annual** – Gets a base value for the whole year, then compares and calculates the compensation.	✓
paymentPeriod	A parameter setting a frequency of payouts. The parameter defines the default "Payment Period" for Condition Types that do not have it filled in directly. The user can specify it also on a Line Item level. Values: "Monthly", "Quarterly", "Semi-Annually", "Annually"	✓
depositScheme	A parameter providing guidance on compensation accumulation across payment periods. If "targetFor" is "Annual", you need to define how to calculate the compensation value: • **Non-Cumulative** – The compensation value is calculated for the current period based on a cumulation of the base value, then divided by the number of periods (12 months or 4 quarters, 2 for semi-annually, 1 year). • **Cumulative** – The same as with calculation of Non-Cumulative above, but the compensation value of the previous period is excluded.	✓

Company Parameters

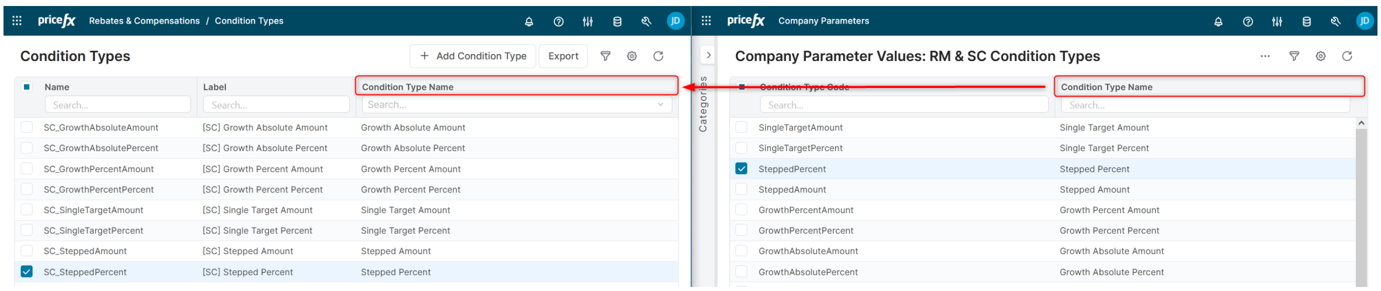
The following supporting configuration parameters are deployed with the package and are used for configuration.

RM_SC_ConditionTypes

This parameter saves the condition type code and condition type name. If the package supports a new condition type, you need to add a new row in this table.

The value of the “Condition Type Name” column will be shown in the “Condition Type Name” (attribute4) column from the Condition Types table from the Rebates module.

Column Name	Description
Condition Type Code	Must match the element name in Groovy Library “SC_CompensationTypesLib” (and “RebateTypesLib” from Rebate Manager if deployed together).
Condition Type Name	Will be shown in “Condition Type Name”.



SC_CustomerFieldMapping

This parameter maps the **Customers** master table attributes (source fields) with the datamart field names. You should check it and update based on the master table structure in your partition as explained in the configuration documentation.

Column Name	Column Label	Description
name	Customer Master Field Name	Attribute name (source field) in Customers
attribute1	Datamart Field Name	Map with a field name in Datamart

SC_ProductFieldMapping

This parameter maps the **Products** master table attributes (source fields) with the Datamart field names. You should check it and update based on the master table structure in your partition as explained in the configuration documentation.

Column Name	Column Label	Description
name	Product Master Field Name	Attribute name (source field) in Products
attribute1	Datamart Field Name	Map with a Field Name in Datamart

Dependency Parameters

List of parameters that come from dependencies and have an effect on the package behavior.

- CurrencySymbols
- ApprovalCondition
- ApprovalWorkflowSetup
- Approvers
- WFExpressionVariableConfiguration
- WFLookupFilterConfiguration

Attributes

This section enlists attributes for various elements used for the package functionality.

Agreement Header Type Attributes

No extra attributes are used for Agreement Header Types.

Condition Type Attributes

Condition type attributes are needed for the sales compensation logic to calculate the compensation value and agreement records.

The package deploys also attributes used for functions in the Rebate Manager Package. Those are shown in light grey color.

Attribute	Attribute Name	Default Label	Type	Description	Advanced Configuration override
formulaName	formulaName	Pricing logic	Drop-down list	Sets a logic to run. The value should be "Compensation Logic".	
attribute1	CustomerSelectionLevel	Customer Selection Level	Drop-down list		
attribute2	CustomerFilterLogic	Customer Filter Logic	Text field		
attribute3	PaymentPeriod	Payment Period	Drop-down list	Defines the payment period for a condition type. If users do not set a value for this attribute, there is the "Payment Period" input in the compensation agreement with the same values. Values: "Monthly", "Quarterly", "Semi-Annually", "Annually"	✔
attribute4	ConditionType Name	Condition Type Name	Drop-down list	Sets a condition type template for the current condition type. The value is set to "Condition Type Name" in Company Parameters.	
attribute5	PayoutDays	Payout Days	Number		✔

				Enter the number of days after the end date of the payment period when the user wants the payout.	
attribute6	BaseSource	Rebate Source Name	Text field		
attribute7	BaseFieldValue	Rebate Base Field Value	Text field		
attribute8	BaseFieldDate	Rebate Base Field Date	Text field		
attribute9	TargetFor	Target For	Drop-down list	Defines the target input for a period or annually. Values: "Payment Period", "Annual"	✓
attribute10	SourceType	Source Type	Drop-down list		
attribute11	DepositScheme	Deposit Scheme	Drop-down list	Defines the calculation type for a compensation value. If Target For = "Payment Period", users do not need to set a value for this attribute. Values: "Cumulative", "Non-Cumulative"	✓
attribute12	BaseFieldCustomer	Rebate Base Field Customer ID	Text field		
attribute13	BaseFieldProduct	Rebate Base Filed Product ID	Text field		
attribute14	BaseFieldQuantity	Rebate Base Field Quantity	Text field		
attribute15	ProductFilterLogic	Product Filter Logic	Text field		

Agreement Record Attributes

The following extra information is provided.

The package deploys also attributes used for functions in the Rebate Manager Package. Those are shown in light grey color.

Attribute	Attribute Name	Default Label	Description	Accelerator
attribute1	CurrentBaselineValue	Current Baseline Value	Baseline value (revenue or margin ...) in this period	SC, RM
attribute2	CurrentRebate	Current Rebate		RM
attribute3	PayToID	Pay To ID	The ID of a Sales Agent who will be paid	SC, RM

attribute4	CurrentBaselineQuantity	Current Baseline Quantity		RM
attribute5	ForecastBaselineValue	Forecast Baseline Value		RM
attribute6	ForecastQuantity	Forecast Quantity		RM
attribute7	Forecast	Forecast		RM
attribute8	AccrualForecastBaselineValue	Accrual Forecast Baseline Value		RM
attribute9	AccrualForecast	Accrual Forecast		RM
attribute10	TruesUp	Trues Up		RM
attribute11	AccrualMethod	Accrual Method		RM
attribute12	SalesGoalIncreasePct	Sales Goal Increase %		RM
attribute13	ForecastType	Forecast Type		RM
attribute14	AccrualForecastQuantity	Accrual Forecast Quantity		RM
attribute15	GeneralFilter	General Filter	Filter which was used as Compensation Agreement input.	SC
attribute16	Currency	Currency	Compensation Currency	SC
attribute17	CurrentCompensation	Current Compensation	Amount of money which will be paid	SC

Sellers Attributes

The following extra information is expected to be in the Sellers table.

Attribute	Label	Type
sellerId	Seller ID	String
name	Seller Name	String
attribute1	First Name	String
attribute2	Surname	String
attribute3	Reports To	String
attribute4	Pricefx User Account Id	String
attribute5	Active	String
attribute6	Team ID	String
attribute7	Team Name	String

Publishing Templates

The following templates are provided.

Name	Convertible to PDF	Preprocessing Logic	Template File Name
[SC] Sales Compensation Agreement	✓	SC_SalesCompensationAgreementReport	publishingTemplates_RBA_[SC] Sales Compensation Agreement.docx
[SC] Overview Report	✓	SC_OverviewReport	publishingTemplates_RBA_[SC] Overview Report.docx
[SC] Transaction List	✓	SC_TransactionsReport	publishingTemplates_RBA_[SC] Transaction List.docx
[SC] YTD Report	✓	SC_YTDReport	publishingTemplates_RBA_[SC] YTD Report.docx

Dashboards

Table of dashboards included in the package.

Name	Logic	Description
Compensation Dashboard	SC_Dashboard_Compensations	Shows a compensations value of each compensation type from the beginning of the year to the current date.

Access Management

A list of predefined business roles and user groups with minimal access rights.

Business Roles

- SC_Administrator
- SC_SalesManager
- SC_SalesAgent

User Groups

- SC_SalesManager

Other Components

Agreement Record Sets

- [SC] Sales Compensations - Default view that shows only Agreement Records which have Agreement Header Type starting with the "[SC]" prefix.

View Preferences

- [SC] Default - Default view for the package. It hides attributes that are not relevant for compensation context.

Approval Workflows

The Approval Workflow Library is part of the package as a dependency. It is extended with new types for sales compensation context. For details see Accelerate Approval Workflow Package (AWP).

Workflow Type	Workflow Name	Logic Name
SCA	Compensation **Agreement** Approval Workflow	SC_SalesCompensationAgreement
SCR	Agreement **Record** Approval Workflow	SC_AgreementRecord

Glossary (SC)

The page list specific terms, vocabulary, and definitions that are used in the context of the Sales Compensation package.

Term	Description
Compensation	A term used in the system as a final reward. In reality, it could be for some companies just a bonus, for other commission and in some cases incentives.
Incentive	An amount of money or non-monetary reward to motivate someone to achieve something.
Commission	Always in cash form, commission is an income payment. It could be a percentage of a product or service sold.
Sales Compensation Plan	It outlines sales agent' base salary as well as the company's commission and incentive program with strategy. Commission, bonus and incentive structure incentivize sales force to reach their objectives in order to earn a deserved reward.
Pay mix	The ratio of base salary to target compensations that make up On-Target Earnings (OTE).
On-Target Earnings (OTE)	Refers to an employee's pay mix made of basic salary and the additional variable component such as commission as their compensation.

Where To Go Next

- Glossary

Workflow Variables (SC)

This page provides a list of variables used for building conditions for approval workflows inside the package. It provides support information for Configuration (SC).

- Compensation Agreement Approval Workflows
- Agreement Record Approval Workflows

Compensation Agreement Approval Workflows

SCA is the name of Workflow Type that must be used for workflows you build on top of any Compensation Agreement. SCA must be used in ApprovalWorkflowSetup, ApprovalCondition and Approvers tables inside Company Parameters.

A list of all possible variables is available also in Element Name in Accelerators from Approval Workflow Package.

Header - Label	**Element Name**	**Example**
Start Date	startDate	startDate == "2021-01-31"
End Date	endDate	endDate == "2021-01-31"
Payout Date	payoutDate	payoutDate == "2021-01-31"
Seller	seller	Seller == "SC-001"
Currency	currency	header.currency == "EUR"
Header - Compensation Detail		
Previous Compensation	previousCompensation	previousCompensation >= 10000
Current Compensation	currentCompensation	currentCompensation >= 50000
Line Item - Label		
Condition Type	rebateType	rebateType = "SC_SingleTrargetPercent"
Input		
Target	line.Target	"line.Target" > 100
Compensation	line.Compensation	"line.Compensation" == 2.0
Compensation %	line.Compensation %	"line.Compensation %" > 10
Payment Period	line.Payment Period	"line.Payment Period" == "Annually"
Line Item - Compensation Detail		
Previous Baseline Value	line.PreviousBaselineValue	"line.PreviousBaselineValue" > 127
Current Baseline Value	line.CurrentBaselineValue	"line.CurrentBaselineValue" > 1200

Previous Compensation	line.PreviousCompensation	”line.PreviousCompensation” > 1000
Current Compensation	line.CurrentCompensation	”line.CurrentCompensation” >= 1200
Line Item - Compensation Type Info		
Target For	line.TargetFor	”line.TargetFor” == “Annual“
Deposit Scheme	line.DepositScheme	”line.DepositScheme” == ”Non-Cumulative”
Payment Period	line.PaymentPeriod	”line.PaymentPeriod” == ”Monthly”
Seller Name	line.SellerName	”line.SellerName” == ”John Doe”
General Filter	<not supported>	
Customer(s)	<not supported>	
Product(s)	<not supported>	

Agreement Record Approval Workflows

SCR is the name of Workflow Type that must be used for workflows you buildi on top of any Agreement Record. SCR must be used in ApprovalWorkflowSetup, ApprovalCondition and Approvers tables inside Company Parameters.

A list of all possible variables is available also in Element Name in Accelerators from Approval Workflow Package.

When the condition is set up, use the field name and do not add any prefixes; see the table below with examples having specific meaning for this package.

Label	Element Name	Example
Current Baseline Value	attribute1	attribute3 > 1000
Pay To Id	attribute3	attribute3 == “SC-001”
Currency	attribute16	attribute16 == “EUR”
Current Compensation	attribute17	attribute17 >= 1500

Upgrade (SC)

This tutorial will guide you through the upgrade of the Sales Compensation Accelerator.

In this section:

- Pre-requisites
- Upgrade Steps

Pre-requisites

Before you start, ensure that you have:

- Access to a partition on the Pricefx server (8.0 or newer). You will need:
  - Server URL
  - Partition name
  - Username and password for a partition user with sufficient rights for using the Accelerator
- Access to Pricefx PlatformManager
  - Username and password for PlatformManager user
  - The user must have the following permissions for your partition (to which you plan to deploy the Accelerator):
    - Permission *Marketplace Templates - deploy*
- Familiarize yourself with the steps required after the upgrade – Manual Upgrade Steps (SC).
- Optionally, read about changes in Release Notes (SC).

Upgrade Steps

Select Partition for Deployment and upgrade logics.

1. In PlatformManager, navigate to **Marketplace** > **Accelerator Packages**, find the *Sales Compensation - Upgrade.*
2. Click **Deploy** and select a partition to which you want to upgrade.
   Only logics are deployed. The configuration remains without changes.
3. Click **Deploy**.
4. A warning dialogue will appear. After you read the warning text and you agree with the conditions, you can click **Continue**.
5. The first part of the upgrade is complete. Go to your partition and continue with the manual steps required after the upgrade.
   The exact process depends on the original version of the package, you will find all details in Manual Upgrade Steps (SC).

Troubleshooting (SC)

In this section, you can find troubleshooting tips that will help you during the support procedure.

Where do I find a package version?

For efficient communication with the support team, you should know which package version is used.

1. Go to **Company Parameters**.
2. Search for the 'deployedAccelerators' parameter.
3. Find the key 'sales-compensation', its value contains 'templateVersion'.
4. Version is a value stored in 'templateVersion'.

Release Notes (SC)

- Manual Upgrade Steps (SC)

Manual Upgrade Steps (SC)

In this section, you will find all manual steps which need to be done while upgrading between versions. A description of the whole upgrade procedure is described in the Upgrade (SC) section. In addition, you can also check out the latest release notes.