Complete Vizibility to your Incentive Plans

USER GUIDE
HOW IT WORKS

Publication Information

Publication Date: June 30, 2025

Document code: IncentViz – How It Works User Guide

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ABOUT THIS GUIDE

This document provides a high-level overview and flow diagram describing "How IncentViz Works" in business terms.

Intended Audience

This document is for all users of IncentViz but is particularly important to those responsible for reviewing and processing credits and payments for any commission, rebate, or royalty program.

Required Knowledge / Pre-requisites

No prior knowledge or pre-requisites are required before proceeding with the content in this User Guide.

NOTE: More information can be found in the *IncentViz - Understanding Sales Plans* related to the configuration of Sales Plans, Quota Credits, and Quota Payments as referenced herein.

Contacting Single Source Systems

If you have questions about IncentViz submit an email and send it to Success@singlesrc.com.   A support ticket will be created, and a support resource will contact you.

For the latest documentation, select the Help option from the main menu in IncentViz. We recommend that you check this website periodically for updated documentation. If you have comments about the documentation, contact Success@singlesrc.com.

START HERE -- DEFINITIONS

The following terms are used within the IncentViz application. Please review for understanding and reference as you work through this user guide.

Sales Plan: Sales Plans are configured within IncentViz and align with the organization's sales goal for a salesperson or entity that will receive some type of payment (Commission, Bonus, Rebate, Royalty). Sales Plans are composed of an Effective Date, one or more Quota assignments, Quota Credit definition(s), and Payment definition(s). Definitions for these terms are described below.

Credit Record: a record created and stored in IncentViz that represents the "credit" earned for a Qualified Transaction. Accumulated credits can represent the percentage of attainment (actual) when compared to an assigned Quota (planned).

Effective Date: Represents the Start and End Dates of a Sales Plan.

Host-ERP System: the ERP system your company uses to process orders and invoices.

Qualified Transaction*:* any order or invoice that meets the conditions set forth in a Sales Plan to make the transaction eligible for a commission, bonus, rebate, or royalty credit and/or payment.

Quota: The dollar amount (goal) a salesperson or entity is expected to transact (sell, write, buy, or work) during the Effective Date as defined within a Sales Plan.

Quota Credit: The individual or aggregate amount of quota or credit earned based on the order or invoice value for a Qualified Transaction.

Payments Earned: The individual or aggregate value of *all* Payment Records that have been calculated for all Qualified Transactions.

Payments Due: The individual or aggregate value of *all* Payment Records that have been calculated, but not paid, for all Qualified Transactions.

Payment Record: a record created and stored in IncentViz that represents the payment amount earned for a Qualified Transaction. In addition to the amount and other details related to the transaction, Payment Records have a status of earned, due, and paid.

Release Condition: a configurable condition that must be met before a Payment Record is release for payment. *(See also IncentViz User Guide – How It Works)*

Payee: a party (department, sales manager, customer, vendor, etc…) other than the Salesperson that receives a payment (commission, bonus, rebate, royalty) based on a Qualified Transaction**.**

Payments Paid: The individual or aggregate value of *all* Payment Records that have been calculated, and have been paid, for all Qualified Transactions.

Period: Typically represents the Effective Date of a Sales Plan but can also represent a Timeframe.

Salesperson: person identified on an order or invoice responsible for a sales transaction.

Timeframe: Start and End Dates that may be specified in a Sales Plan or filtering criteria used in the View Quota or View Payments dashboard views.

UNDERSTANDING INCENTVIZ

Your Sales Plan

Sales Plans are typically defined and assigned by the company's executive and/or sales management. Sales Plans are the key component of how IncentViz behaves and are assigned to any person or entity that will receive some type of compensation or payment and be managed within IncentViz. IncentViz uses the Sales Plan to track order and invoice transactions then accumulates quota credits (attainment amounts) and calculates compensation (commissions, bonuses, spiffs, rebates, or royalties) related to transactions that meet the condition(s) (qualify) according to the Sales Plan definition.

A Salesperson or entity is assigned at least one (1) Sales Plan but could be assigned *multiple* Sales Plans as defined by the company's sales or accounting department.

Within a Sales Plan, a Salesperson may have more than one Quota assignment(s). An example might be a separate quota for selling Machines, one for selling Accessories, and another for selling Consumables.

A **Quota Credit** definition of the Sales Plan specifies the business rule (conditional logic) that must be met for an order or invoice to be considered a Qualified Transaction.

A **Quota Payment** definition of the Sales Plan specifies the structure and calculation method for payments earned for an order or invoice that meets the Quota Credit criteria.

Multiple Quota Credits and Quota Payments can be defined within a single Sales Plan to generate different payments for different salespersons or payees.

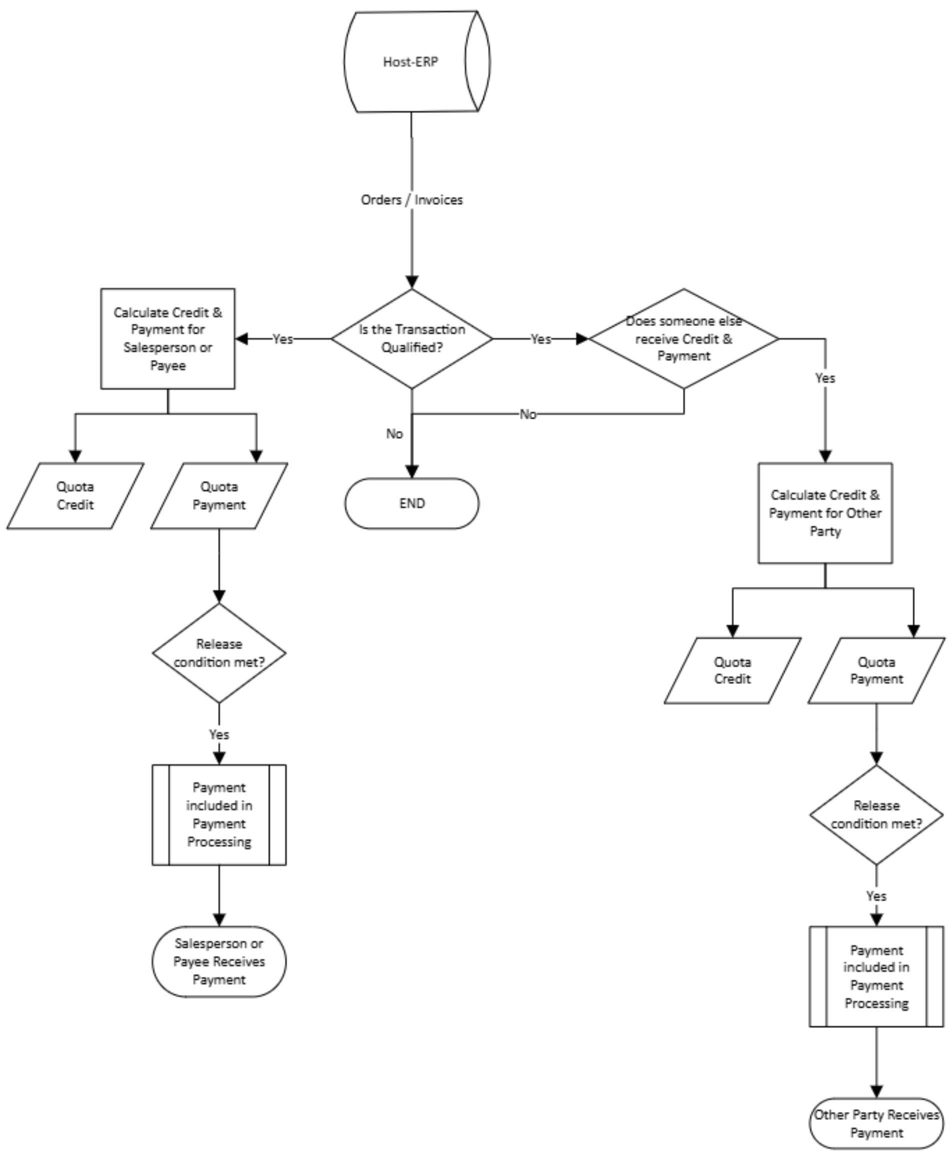
All questions related to the definition, structure, and calculations of a Sales Plan should be directed to your company's sales management or accounting department.

Qualified Transactions Only!

As a reminder, it's important to understand that only Qualified Transactions from the host-ERP system, are eligible for Quota Credit and Payment reporting. Non-qualified transactions will not appear in IncentViz.

INCENTVIZ FLOW DIAGRAM

This flow diagram represents the primary processes and decision points used by IncentViz to convert qualified transactions (Orders and/or Invoices from the Host-ERP system) into credits and payments for salespeople and/or other parties. For brevity, the first decision point is labeled “Is the Transaction Qualified?” Any order or invoice that meets the conditions for a commission, rebate, or royalty to be generated is considered *qualified*.



PROCESSES AND DECISION POINTS

1. PROCESS: Orders & Invoices are transmitted from host-ERP to IncentViz

All orders and invoices and related lines from the host-ERP system are transmitted to IncentViz during the regularly scheduled synchronization service. This service runs in the background, and the frequency (typically every 2 hours) is configurable by your system administrator.

Orders/Lines are synchronized when any of the following actions occur:

- Order Creation: At time of Order Entry
- Order Update: anytime an existing order is changed, the new updates are synchronized with the existing order in IncentViz. Updates that trigger synchronization include:
    - Changes to the Order Header
    - Salesperson ID
    - Order Line Item / Product ID (changed, added or deleted)
    - Order Line Quantity, Price, Discount

Invoices/Lines are synchronized when the invoice is created and saved in the host-ERP. Changes to existing invoices are typically not allowed once the invoice has been generated, so invoices are synchronized only once upon creation in the host-ERP.

2. DECISION POINT: Is the Transaction Qualified?

Once the order and/or invoice is received by IncentViz, it immediately compares the transaction to all Sales Plans where the Sales Plan STATUS = *Active*. During the comparison of each Sales Plan, IncentViz determines if the transaction meets any of the criteria as defined by each Quota Credit on the Sales Plan. The criteria can apply to a commission, rebate, or royalty. If the condition is met, IncentViz considers the transaction a *qualified* transaction and IncentViz continues with step 3 below. If the transaction does not meet the conditions of any of the Quota Credits, the process ends.

3. PROCESS: Calculate Credit & Payment for Salesperson or Payee

Based on the conditions defined in the Quota Credit, corresponding Quota Credit and Quota Payment records will be generated. The calculated value for the Quota Credit record is based on the configuration settings within the Quota Credit. Again, these records can be created for a commission, rebate, or royalty. The calculated value of the Quota Payment record is based on the associated Quota Payment configuration that relates to the Quota Credit. *(See Understanding Sales Plans for details on Quota Credits and Quota Payment settings)*

4. DECISION POINT: Does someone else receive Credit & Payment

Certain Sales Plans may include giving credit for the sale and a payment for someone other than the salesperson or party of a rebate or royalty program (payee). Examples include commission override for sales managers or other personnel within the company. Again, IncentViz determines if the transaction meets any of the criteria as defined by each Quota Credit on the Sales Plan. If the condition is met, IncentViz continues with step 5 below.

5. PROCESS: Calculate Credit & Payment for Other Party

Based on the conditions defined in the Quota Credit from step 4 above, corresponding Quota Credit and Quota Payment records will be generated. The calculated value for the Quota Credit record is based on the configuration settings within the Quota Credit. The calculated value of the Quota Payment record is based on the associated Quota Payment configuration that relates to the Quota Credit. *(See Understanding Sales Plans for details on Quota Credits and Quota Payment settings)*

6. DECISION POINT: Is the Release Condition Met?

Although the Payment record (commission, rebate, royalty) has been created, IncentViz will not include the payout in Payment Processing until the "Release Condition" is met. The Release Conditions are separated into three groups: Sales Order, Service Order, or Invoice and are configured by setting the *Source* field in the Quota Credit section of the Sales Plan. Below are some examples of when a Release Condition is met based on the Source value:

Sales Orders

- When the Order is created
- When the Order meets a specific status (ie. Booked, Released, Shipped)

Service Order

- As soon as the work is performed and the Service Order is invoiced
- When partial A/R payment is received from the customer
- When full A/R payment is received from the customer

Invoice

- When the Sales Order is invoiced
- When partial A/R payment is received from the customer
- When full A/R payment is received from the customer

When any of the above conditions are met, the payment is released and will be included in the next Payment Processing event that occurs.

7. PROCESS: Payment Included in Payment Processing

Payment Processing typically occurs at the end of the period (month, quarter, year). Any commission, rebate, or royalty that has met its Release Condition will be included in the payment batch. Upon finalization of the payment batch, both the Quota Credit and Quota Payment records are marked "paid" and locked by IncentViz. No further changes can be made to these records.

8. END: Salesperson, Payee, or Other Party Receives Payment

The actual payments are typically performed by H/R (commission payments included in P/R) and accounting (rebate and royalty payments process for the customers or vendors). This is the final step in the payment process.

APPENDIX

STANDARD DATA SYNCHRONIZED FROM HOST-ERP SYSTEM

Below is the list of tables that are synchronized and stored in IncentViz from the host-ERP system. Although the table and column names are unique to each host-ERP, the below list reflects the *generic/business* names of the table, rather a name that is specific to your host-ERP.

As part of the initial configuration, IncentViz will perform an initial data load by which all the below data is copied and stored from the host-ERP into IncentViz. Once the initial data load has occurred, IncentViz monitors the host-ERP and synchronizes any changes that occur in the host-ERP and updates the related data in IncentViz thereby keeping it synchronized. The synchronization process occurs every 2-4hrs and is configurable within IncentViz.

IncentViz stores the data locally eliminating network traffic which helps maintain performance during calculation processing and reporting.

TABLE NAME (GENERIC)	DEFINITION
CUSTOMERS	Data related to a Customer master record. Customers purchase goods & services and are assigned to an order (sales or service) and invoice.
CUSTOMER BILL-TO / SHIP-TO	If stored separately from the Customer record, both Bill-To and Ship-To address information is synchronized.
CUSTOMER "CODES"	Certain "code"/secondary tables related to the Customer Master are synchronized - Customer Type - End User Type - National Account - Territory / Region / Location
ITEM / PRODUCT MASTER	Data related to an Item/Product. Items/Products are goods & services listed on an order (sales or service) and the invoice.
ITEM "CODES"	Certain "code"/secondary tables related to the Item Master are synchronized - Commodity Code - Family Code - Product Code

TABLE NAME (GENERIC)	DEFINITION
INVOICE / LINES	Data on the invoice header and line detail generated by the host-ERP.
ORDER / LINES	Data on the order header and line detail generated by the host-ERP.
SALESPERSON	Salesperson data and department. Salespersons are specified on an order and invoice and are responsible for sales activities.

NON-STANDARD DATA SYNCHRONIZED FROM HOST-ERP SYSTEM

IncentViz does not synchronize the entire data set from the host-ERP system. It only synchronizes data it needs to perform the conditional checking for Qualified Transactions and calculate payments based on a company's incentive program(s).

The primary data IncentViz synchronizes by default is listed in the above section (*Standard Data Synchronized from the Host-ERP System*.) On occasion a company uses custom, user defined data, or even standard data in their incentive program(s). If any of this data is not included in the default synchronization, IncentViz can access and include this data ("Non-Standard") through the native integration without modifying the connector.

Any Non-Standard required to support a Sales Plan can be configured in the IncentViz connector, automatically synchronized, and will be stored as a custom field inside IncentViz. Once stored in IncentViz, it can be used by a Sales Plan to perform conditional checking and payment calculations.

DATA EXTERNAL TO THE HOST-ERP SYSTEM

Unfortunately, data stored in systems outside of the host-ERP ("External Data") cannot be used by IncentViz. External Data may include data from a CRM, Time & Attendance, or other external system. For this data to be utilized by IncentViz, it must be stored and maintained in the host-ERP system.

END OF DOCUMENT