



USER INTERFACE GUIDE

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ABOUT THIS GUIDE

This document contains a collection of user interface features that will enhance the user experience and productivity when using IncentViz.

Intended Audience

This document is for all users of IncentViz.

Required Knowledge / Pre-requisites

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

Contacting Single Source Systems

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

For the latest documentation, go to incentviz.singlesrc.com/help. We recommend that you check this website periodically for updated documentation. If you have comments about the documentation, contact Success@singlesrc.com.

BROWSER FEATURES

IncentViz uses a browser-based interface therefore many standard browser functions can be utilized while using IncentViz.

Zoom In/Out (enlarge/contract)

- Use the Zoom feature in the browser menu to scale the content.
- Use the wheel on your mouse. Hold down the Ctrl key and spin the mouse wheel to scale the content.

Open New Form / Tab

Multiple forms can be opened simultaneously in IncentViz by launching the form in a new tab on the browser.

- *Hold down the Ctrl key while clicking* on an IncentViz menu selection or Action Button to open a new form and tab.
- *Hover over a menu selection or Action Button and right-click.* Select desired the option (open new tab, open new window, copy link) from the browser menu.

Open a Duplicate copy of the Current Form

The same form can be opened multiple times in IncentViz. To open a duplicate copy of a form, most browsers offer a Duplicate option.

- Hover over the desired browser tab at the top of the browser window, then *right-click and select Duplicate* to open the same form in a new tab.
- Highlight & copy the current form URL, open a new tab in the browser and paste the URL into the new browser tab. This will open another copy of the form.

Back to Previous Form / History

Using the standard “back” feature in your browser, you can return to a previous form that was opened. In addition, you can utilize the History menu in your browser to jump to a previously opened form.

Vertical Scrolling

Most of the forms in IncentViz display data that requires more than space than is provided on the monitor. Use the vertical scroll bar (right side of window) to scroll and view more content or data displayed in the window.

INCENTVIZ FIELD FEATURES

Filter Fields

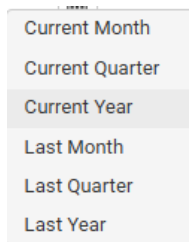
Many forms within IncentViz have fields for which a specific record or a group of records can be retrieved. For example, if Cust Name or Cust ID is a field available on a form, by populating this field, IncentViz will retrieve all Customer records of the value specified that have records in the current form.

Date Field

Data can be entered into a Date field by placing the cursor at the desired location in the field and overriding the data. A calendar feature can also be accessed by clicking on the calendar button on the right side of the field.

QUOTA CREDIT & PAYMENTS PERIOD FILTER

An additional feature is available on these typw forms when setting the date or filter value on the Start or End Date on these forms. While hovering over a date field, right-click to access the Period Submenu.



From this menu you can select any of the above periods for which the data will be filtered.

Pulldown Lists

Data in a pulldown list, such as a Salesperson, can be selected using one of two methods.

- Click on the triangle on the right side of the pulldown list then using your mouse wheel, scroll until the desired value is identified and left-click to select.
- Quickly jump to a value by clicking on the triangle on the right side of the pulldown list then begin typing. The point in the list will immediately jump to the key combination typed in.

INCENTVIZ GRIDVIEWS

Many forms within IncentViz utilize Grid Views to display the data. Grid Views display data in a table format of rows and columns very similar to what is displayed in a spreadsheet.

Search Filters

Data can be filtered in Grid View using standard IncentViz filtering options (see IncentViz Field Features above). Once the data has been retrieved based on base filtering, further searching, filtering, and sorting can be applied to the Data Table.

Search Filters

NEW

Cust Name: select name...
Cust ID: select customer...
Start Stmt Date: 6/1/2025

Order: select order...
Invoice: select invoice...
End Stmt Date: 10/31/2025

Grid View Display

Grid Views have columns with column titles, and each individual record is displayed as a row within the table.

QUOTA CREDITS

Search Filters

NEW

RESET

	Plan	Person	Name	Invoic...	Invoice Line	Quota Code	Credit Code	Earned Amount	Earned Quanti...	Invoice Date	State
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	15	ESCALATOR	RSMESCALATE	\$10,887.50	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	10	ESCALATOR	RSMESCALATE	\$7,671.50	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	5	ESCALATOR	RSMESCALATE	\$225,756.50	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	10	SALES	RSMBPCT	(\$7,671.50)	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	25	SALES	RSMBPCT	\$10,500.00	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	20	SALES	RSMBPCT	\$3,500.00	10	06/04/2025	06/03

Page 3 of 3 25 Items per page 51 - 58 of 58 items

Grid View – Page Control

Typically, a high number of records will accumulate over time, and the number of records will exceed the page length on the grid. The Page Control exists at the bottom of the Grid View.

The screenshot shows the IncentViz QUOTA CREDITS page. It includes a search filter section with fields for Cust Name, Cust ID, Start Stmt Date, Order, Invoice, and End Stmt Date. Below the filters is a table with columns: Plan, Person, Name, Invoice, Invoice Line, Quota Code, Credit Code, Earned Amount, Earned Quanti..., Invoice Date, and State. The table contains six rows of data. At the bottom, there is a page control bar showing 'Page 3 of 3' and '25 items per page'. A red box highlights the page control area.

	Plan	Person	Name	Invoice	Invoice Line	Quota Code	Credit Code	Earned Amount	Earned Quanti...	Invoice Date	State
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	15	ESCALATOR	RSMESCALATE	\$10,887.50	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	10	ESCALATOR	RSMESCALATE	\$7,671.50	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	5	ESCALATOR	RSMESCALATE	\$225,756.50	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	10	SALES	RSM8PCT	(\$7,671.50)	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	25	SALES	RSM8PCT	\$10,500.00	10	06/04/2025	06/03
DETAILS	CALRSM25	CAL-RSM1	Regional Sales Mgr 1	CAL-40326	20	SALES	RSM8PCT	\$3,500.00	10	06/04/2025	06/03

The number of records on a page can be changed by clicking the Items per Page pop-up list.

The screenshot shows a close-up of the grid view. A pop-up list is open next to the 'Items per page' dropdown, showing options: 25, 50, 100, 250, 500, 1000, and 2000. The page control at the bottom shows 'Page 1 of 3' and '25 items per page'.

Pages can be navigated by clicking the forward and back buttons on the page control.

The screenshot shows the page control bar with navigation buttons: a back button (left arrow), a forward button (right arrow), and a page number '1' of '3'.

Grid View – Column Control

In addition to the Search Filters described above, additional features are available for each column in the Grid View.

Columns can be Sorted in Ascending or Descending order and can also be enabled/disabled from displaying in the grid by checking/unchecking the desired column title.

Invoice Date	Customer Name	Earned Am
10/14/2022		\$219.42
09/29/2022		\$166.11
07/16/2022		\$611.03
07/31/2022		
03/31/2022		
06/28/2022	Twinkles Department	
06/13/2022	Peach Tree Travel	
05/03/2022	Instant Printing	
06/06/2022	Field's Catalog	
10/07/2022	Steveson Sporting G	
04/30/2022	Internal Customer	
08/17/2022	Van Tecknologies	
07/09/2022	Peach Tree Travel	\$166.11

Sort Ascending

Sort Descending

Columns

Filter

☒CommPlanId

☒Statement Date

☒Invoice Date

☒Customer Name

☒Earned Amount

☒Invoice

☒Invoice Line

☒Order

☒Order Line

☒Customer

☒Plan

☒Notes

You can also apply individual filters to each column to narrow your search criteria even further using the Filter wizard.

Invoice Date	Customer Name	Earned Amount
10/14/2022	Sort Ascending	\$219.42
09/29/2022	Sort Descending	\$166.11
07/16/2022	Columns	\$611.03
07/31/2022	Filter	\$143.16
03/31/2022	Twinkles Department	
06/28/2022	Peach Tree Travel	
06/13/2022	Instant Printing	
05/03/2022	Field's Catalog	
06/06/2022	Stevenson Sporting Goods	
10/07/2022	Internal Customer	
04/30/2022		

Show items with value that:

Is after or equal to

8/1/2022

And

Is before or equal to

08/31/2022

Filter

Clear

This is helpful when searching for a group or range of records.

GRID VIEW – Details Button

The DETAILS button **DETAILS** in the left column of the Grid View provides a form view of the same data in the line that is selected in the Grid View.

The screenshot shows the IncentViz Quota Credits interface. On the left, there is a 'Search Filters' section with dropdowns for 'Plan' (CALRSM25) and 'Person' (CAL-RSM1). Below these are several 'DETAILS' buttons. The main area displays a grid of quota credit records. A modal window titled 'Quota Credit Details' is open, showing the following information:

Plan	CALRSM25	Extended Price	\$225,756.50
Person	CAL-RSM1	Extended Cost	\$135,453.90
Quota Code	ESCALATOR	Margin	\$90,302.60
Invoice Date	06/04/2025	Base Amount	\$225,756.50
Customer	CAL-P004010 DELTA WARE INC.	Split Percent	100.00%
Invoice	CAL-40326 5	Split Amount	\$225,756.50
Order	CAL-40326 5	Credit Percent	100.00%
Credit Code	RSMESCALATE	Earned Amount	\$225,756.50
Credit Source	Invoice Sold	Earned Qty	10.0000
Value	Price		

Below the details modal, there is a 'Credit Filters' section with a 'Description' dropdown and a 'Filter' button. The bottom of the interface shows pagination information: 'Page 0 of 0', '25 Items per page', and 'No items to display'.