Complete Vizibility to your Incentive Plans

USER GUIDE
SALES MANAGER

Table of Contents

ABOUT THIS GUIDE

This document contains the definition of terms and the general use of IncentViz by sales management. The Sales Manager Dashboard within IncentViz provides a user interface into Sales Plans and provides the ability for the user to access the sales performance, quota credit (attainment), commissions earned/due/paid, and generate commission statements, for salespersons assigned to the sales manager, on-demand and in real-time.

NOTE: It's important to understand that only qualifying transactions from the host-ERP system that meet the conditions defined within a Sales Plan as "commissionable" and have been invoiced, will be available for quota credit and payment reporting for a salesperson.

Intended Audience

This document is to be used by any person playing the role of Sales Manager.

Required Knowledge / Pre-requisites

The following content should be reviewed prior to proceeding with the material in this guide:

- IncentViz – User Interface Guide
- IncentViz – Understanding a Sales Plan
- IncentViz – How it Works

Contacting Single Source Systems

If you have questions about IncentViz submit an email and send 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.

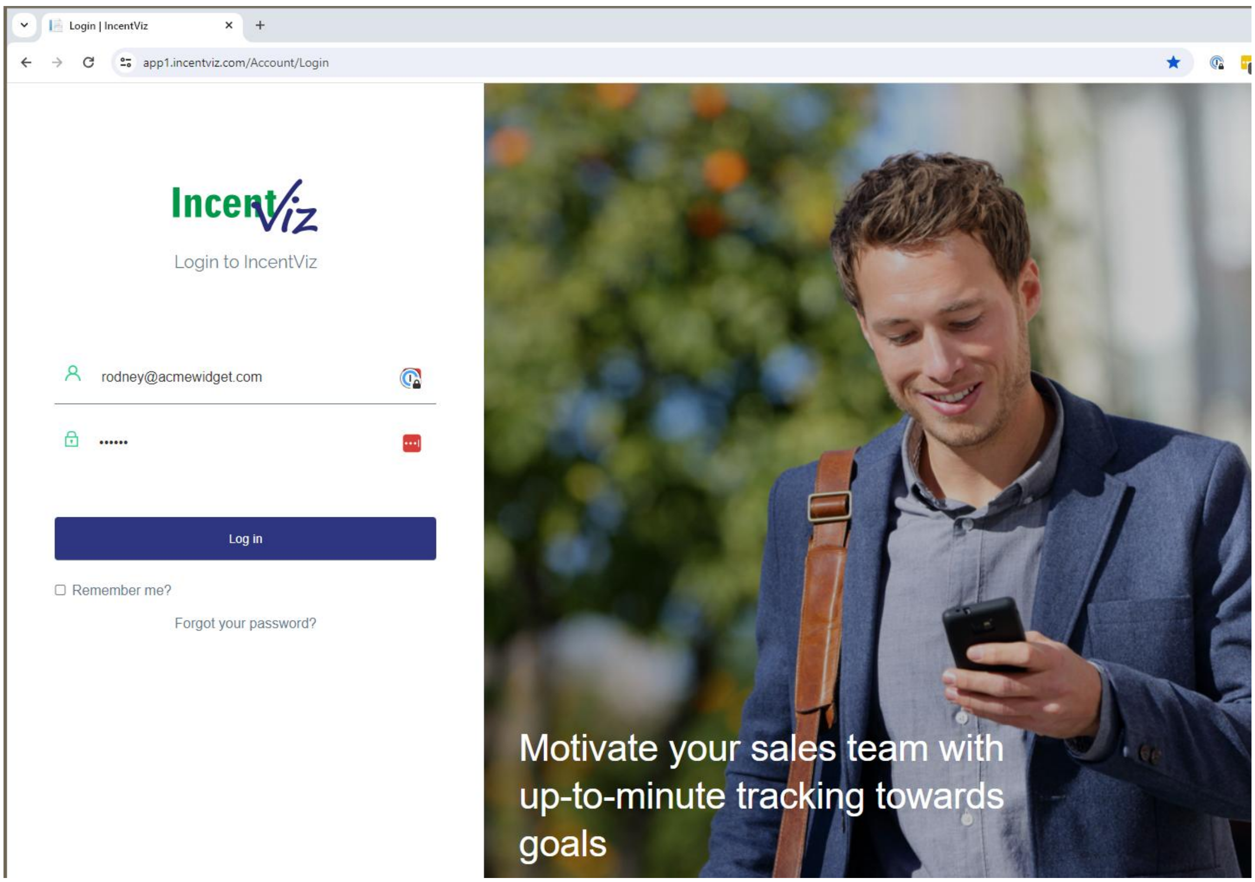
Qualified Transactions Only!

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.

LET'S GET STARTED – LOGIN TO INCENTVIZ

IncentViz is a software-as-a-service (SaaS) application hosted in the cloud. To access the IncentViz login panel, open a web-browser and copy/paste or enter the IncentViz link provided by your sales, accounting, or IT department. A user ID and password will also be provided with the login link.

Once you have entered the web address for IncentViz, you will be prompted with a screen that looks like the following....



In the first field, enter your USER-ID

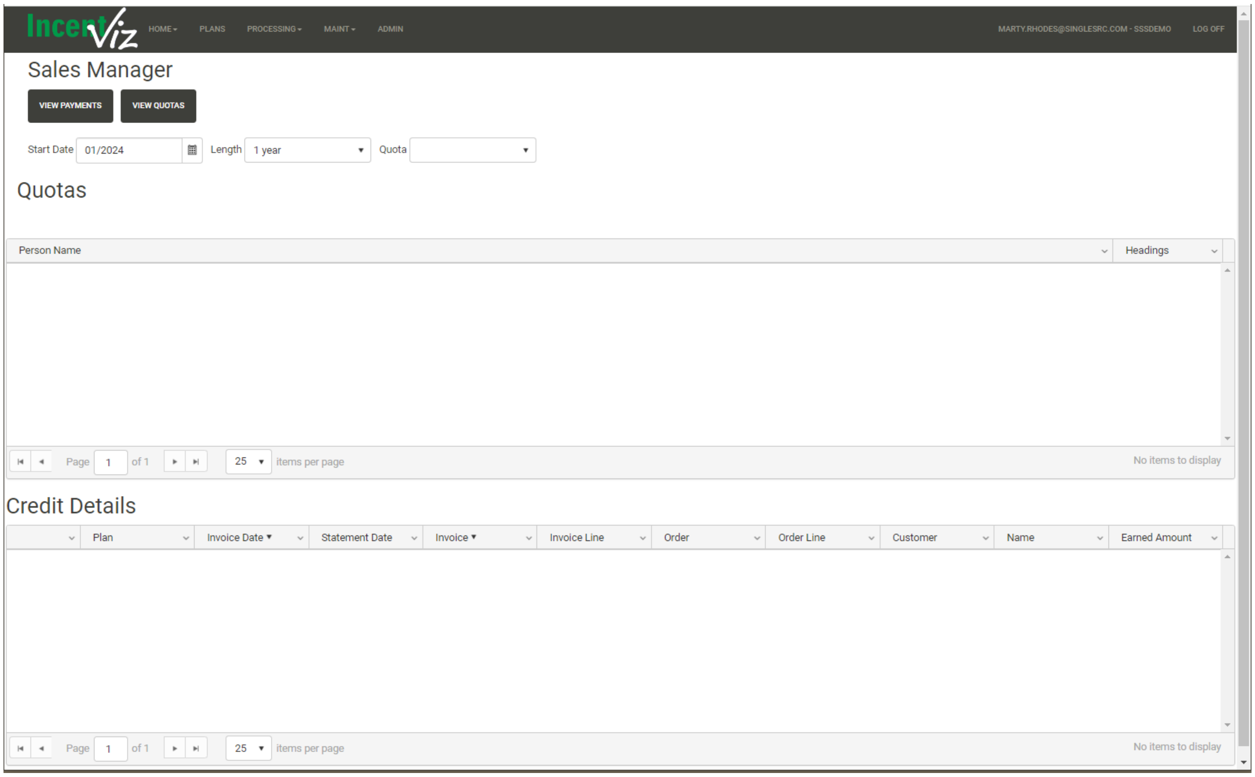
In the second field, enter your PASSWORD.

Click the LOGIN button to proceed into the application.

If you have forgotten your password, click the "Forgot your password?" link to reset your password. You will receive an email with instructions to perform the reset.

If you encounter any other problems with your login, please contact the department member responsible for administering IncentViz.

Upon successful login, you will be presented with the Sales Manager Dashboard that looks like the following:



Sales Manager Dashboard

Your screen will look a bit different depending on the amount of data that has been loaded into IncentViz.

USING THE SALES MANAGER DASHBOARD

OVERVIEW

Viewing and Maintaining Sales Plans

To view and maintain Sales Plans, select PLANS from the main menu. Sales Plans are established for a commission period (yearly, quarterly, monthly), define the conditions necessary for a transaction (order or invoice) to be commissionable, and contain the formula of how the commission payment will be calculated. For more information about Sales Plans, see the *IncentViz– Managing Sales Plans User Guide*.

Check Sales Performance and Quota Attainment (Credit)

Use the VIEW QUOTAS feature of the Sales Manager Dashboard to view and report on sales performance (Quota Credit) and compare the values to the specific Quota assigned to the various Salesperson(s).

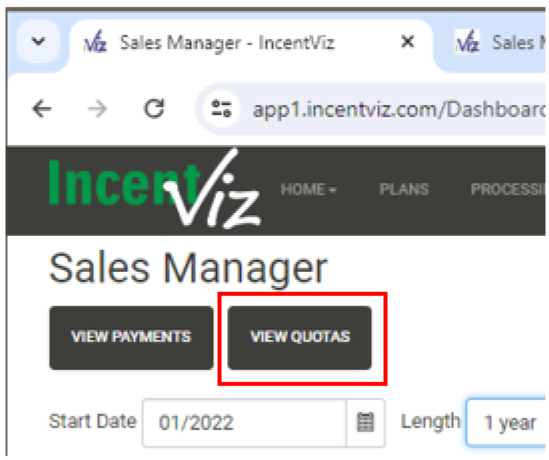
Check Commission or Variable Compensation Earned, Due, and Paid

Use the VIEW PAYMENTS feature of the Sales Manager Dashboard to view and report on commissions or variable compensation payments that have been earned, due, and have been or are to be paid. (see Definitions section of this document to understand the difference between these three values).

VIEW QUOTAS -- Check Sales Performance and/or Quota Attainment

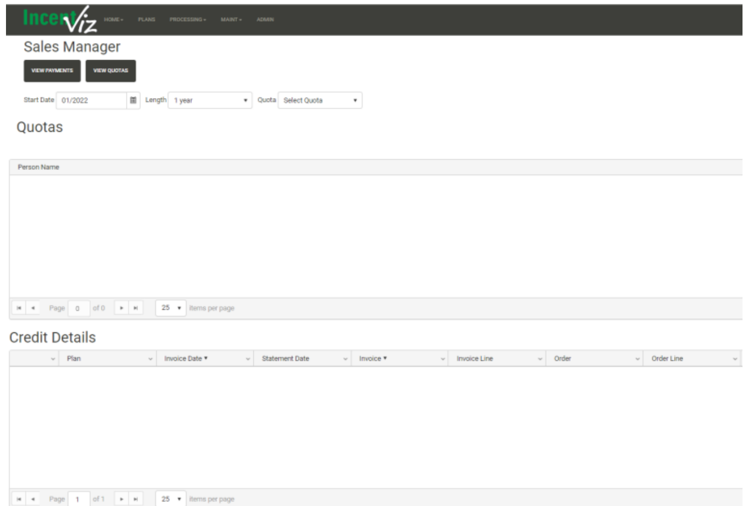
Quota Credit amounts generated by qualifying transactions are automatically created as soon as the order and invoicing transaction(s) have been processed and completed in your host-ERP system. (Refer to specific Sales Plan definitions published by the company's sales management department to understand these conditions.)

Sales performance is measured as a comparison of a salesperson's quota, established in a Sales Plan, and any transactions that meet the condition in which the rep will receive Quota Credit. To view and report on Quota Credit, you will use the VIEW QUOTAS feature within the Sales Manager's Dashboard.

<table>
<tr><th>STEP</th><th>ACTION</th></tr>
<tr><td>1</td><td>Verify you are logged in to IncentViz to access the Sales Manager Dashboard.</td></tr>
<tr><td>2</td><td>Click the VIEW QUOTAS button in upper left-hand corner of the Dashboard.


The Quotas & Credit Details form similar to the image in step 3 below will be displayed.</td></tr>
</table>

<table>
<tr><th>STEP</th><th>ACTION</th></tr>
<tr><td>3</td><td>

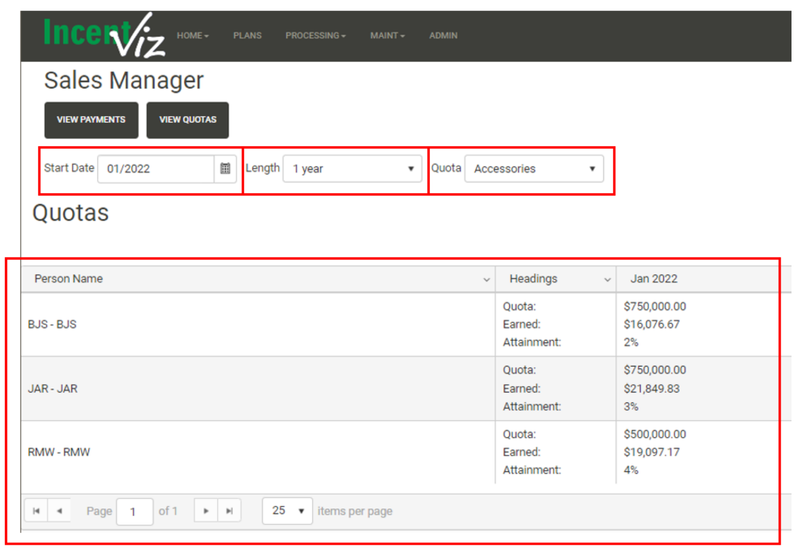


QUOTAS & CREDIT DETAILS FORM

</td></tr>
<tr><td>4</td><td>

SPECIFY FILTER CRITERIA

1. Specify START DATE of desired period to analyze.
2. Specify the LENGTH of time of desired period to analyze.
3. Select the desired QUOTA to analyze using the pull-down list.
   NOTE: only Sales Plan where STATUS=*ACTIVE* will be displayed.



QUOTAS SUMMARY

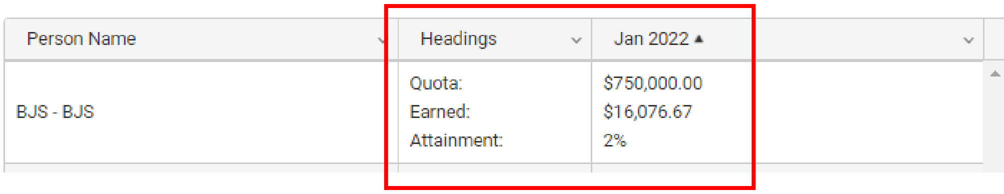
Once the filter criteria has been selected, the results will be displayed in the QUOTAS table. (SEE ABOVE)

</td></tr>
</table>

STEP	ACTION
5.	**QUOTAS SUMMARY**

QUOTAS SUMMARY

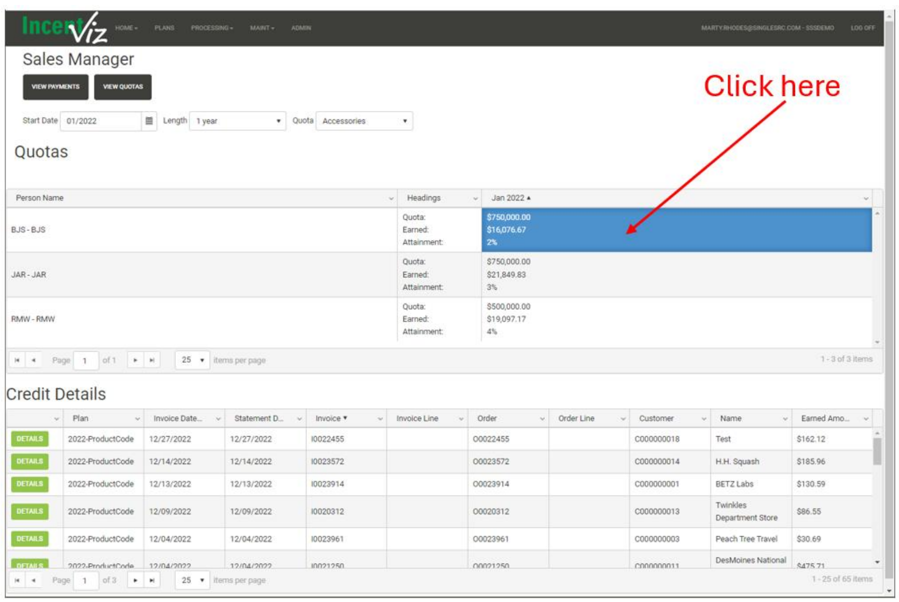
Each person that meets the filter criteria will contain a row within the QUOTAS SUMMARY table.

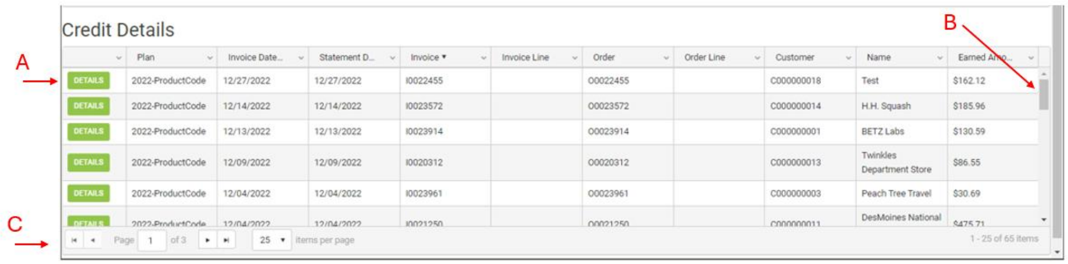


HEADINGS	
QUOTA	The unique quota assigned to the person
EARNED	The dollar amount of Quota Credit (attainment) accumulated.
ATTAINMENT	The percentage amount of Quota Credit (attainment) accumulated.

6. **CREDIT DETAILS**

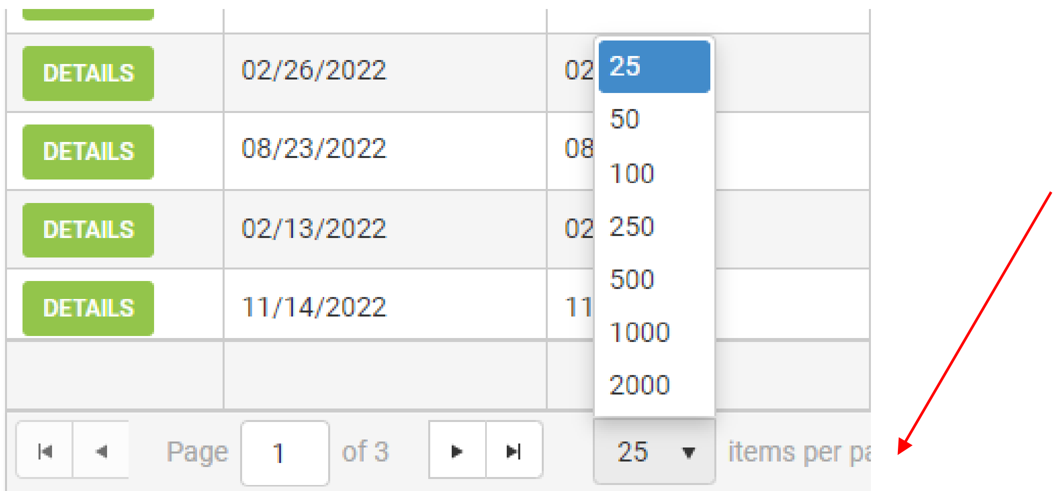
1. Click in the accumulated value cell for a specific salesperson and the CREDIT DETAILS TABLE will be populated with all transactions that represent the EARNED accumulated value.

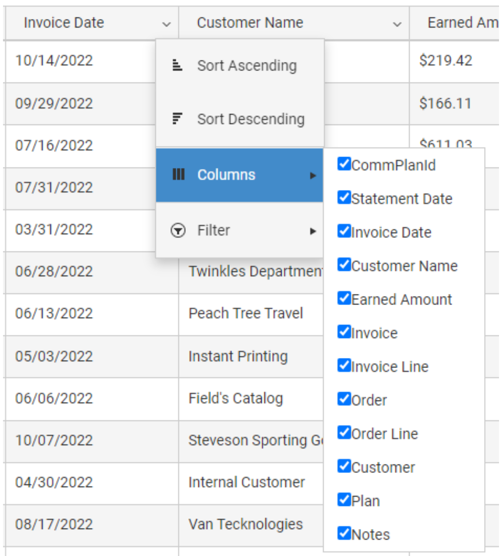
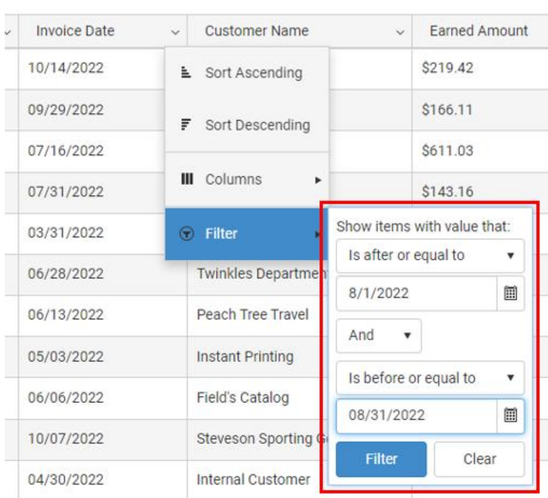


STEP	ACTION
7.	**NAVIGATING CREDIT DETAILS**  A. Click the DETAILS button to see all data related to the transaction. B. Use the scroll bar to navigate to the desired record C. Remember the table view has multiple “pages.” Use these controls to navigate to the desired page of other CREDIT DETAIL records.
8.	**REPEAT…** …Step 6 to view details of other salesperson …Step 4 to change filtering criteria *NOTE: if the form seems to act “confused”, return to STEP 2 in this table and click the VIEW QUOTAS button to reset and clear the filter.*

CREDIT DETAILS – Advanced Features of a Grid View

Typically, a large number of transactions will accumulate over time and the number of transactions will exceed the page length on the grid. Utilize the following features to aid your navigation.

STEP	ACTION
1.	PAGE CONTROL The Page Control exists at the bottom of the Grid View…  The number of records on a page can be changed by clicking the Items per Page pop-up list. Pages can be navigated by clicking the forward and back buttons on the page control. 

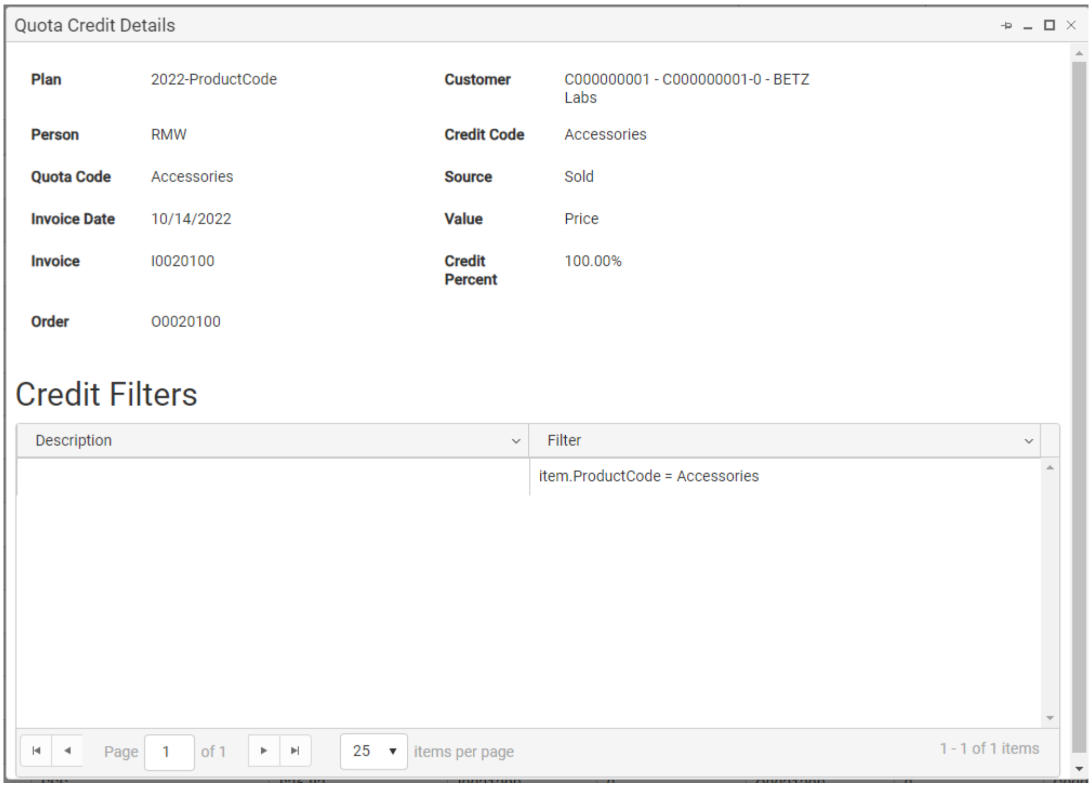
STEP	ACTION
2.	COLUMN CONTROL Additional features are available for each column in the Grid View. **Click on a column title to access.** Columns can be Sorted in Ascending or Descending order and can also be enabled/disabled from displaying in the grid by checking/unchecking the desired column title. 
3.	COLUMN FILTERING You can also apply individual filters to each column to narrow your search criteria even further using the Filter wizard. **Click on a column title to access.** 

STEP	ACTION

4. GRID VIEW (DETAILS Button)

The DETAILS button 

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. Additional functionality will be added to this form in the future.



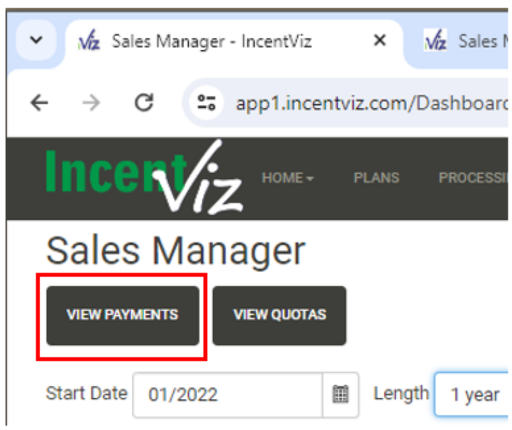
5. GRIDVIEW COLUMN DEFITIONS

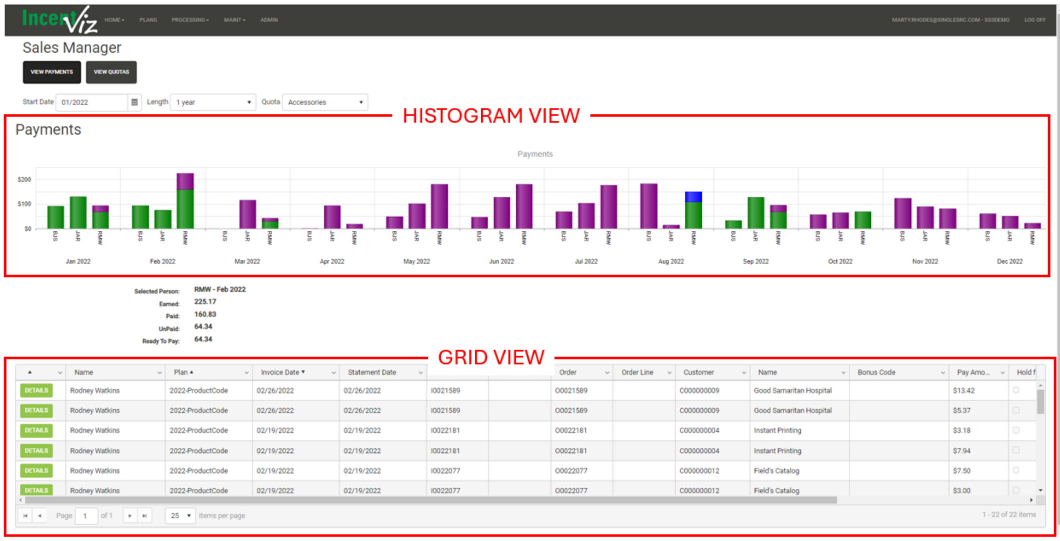
Plan: Name of the Sales Plan currently being displayed
Invoice Date: Date on which the invoice was created.
Statement Date: Posting date of the transaction. Typically, the same as Invoice or Order Date.
Invoice: Invoice number assigned from host-ERP system
Invoice Line: Invoice line number
Order: Order number assigned from host-ERP system
Order Line: Order line number
Customer: The customer ID or account number.
Name: Name of customer on the Order and Invoice.
Earned Amount: The Quota Credit earned for the transaction.

VIEW PAYMENTS – View and Report on Payments Earned, Due, and Paid

Payments generated by qualifying transactions (refer to your specific Sales Plan to understand these conditions) are automatically created as soon as the order and invoicing transaction(s) have been processed and completed in your host-ERP system.

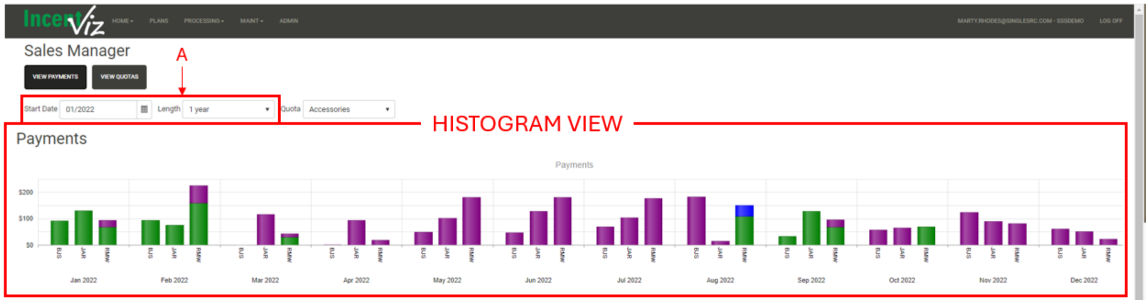
Commission and other variable compensation payments are calculated based on the definitions and formulas defined in a Sales Plan. For each sales transaction that meets the condition in which the rep will receive Quota Credit, a Quota Payment will be calculated. To view and report on Payments calculated, you will use the VIEW PAYMENTS feature within the Sales Manager Dashboard.

STEP	ACTION
1	Verify you are logged in to IncentViz to access the Sales Manager Dashboard.
2	Click the VIEW PAYMENTS button in upper left-hand corner of the Dashboard.  The screen will render the Payments Screen similar to the image in step 3 below.

STEP	ACTION
3	 The **VIEW PAYMENTS** Dashboard contains a Histogram view and Grid view (see separate outlines above).

STEP	ACTION
4	HISTOGRAM VIEW

HISTOGRAM VIEW

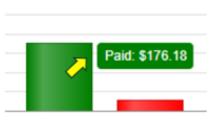


A. **Timeline Selector**: The Timeline Selector utilizes two fields. The first is the desired Start Date of the histogram and the second field specifies the number of periods to be displayed in the histogram. The values in these fields also filter the transactions that are displayed in the Grid View by the specified data range.

A. **Length**: A period (months or year) in duration, that displays a bar graph indicating the Payment(s) Earned, Paid, Unpaid, and Ready to Pay for each individual period as defined in the Timeline Selector.

As you change the Timeline selectors, the histogram and the transactions in the Grid View refresh and will change accordingly. The height of each bar graph reflects the respective Payment amount relative to the height of all bar graphs in the histogram.

Using your cursor to click and select a bar graph will display all of the correlating transactions in the Grid View.



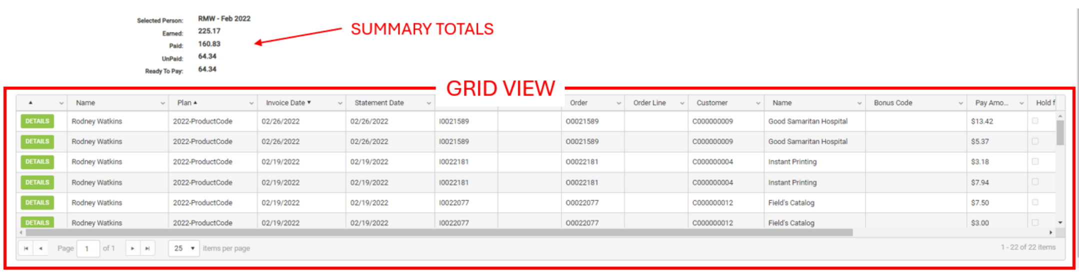
STEP	ACTION
5.	

GRID VIEW

The grid view displays all Payment transactions which are related to the *Timeline Selector* AND the Histogram bar selected by the user.

Each row represents the calculated Payment values the Salesperson will receive for each transaction that meets the condition defined by the Quota Credit in a Sales Plan.

NOTE: if a Payment transaction is expected, but is not included in the Grid View, then NO Payment calculation occurred.

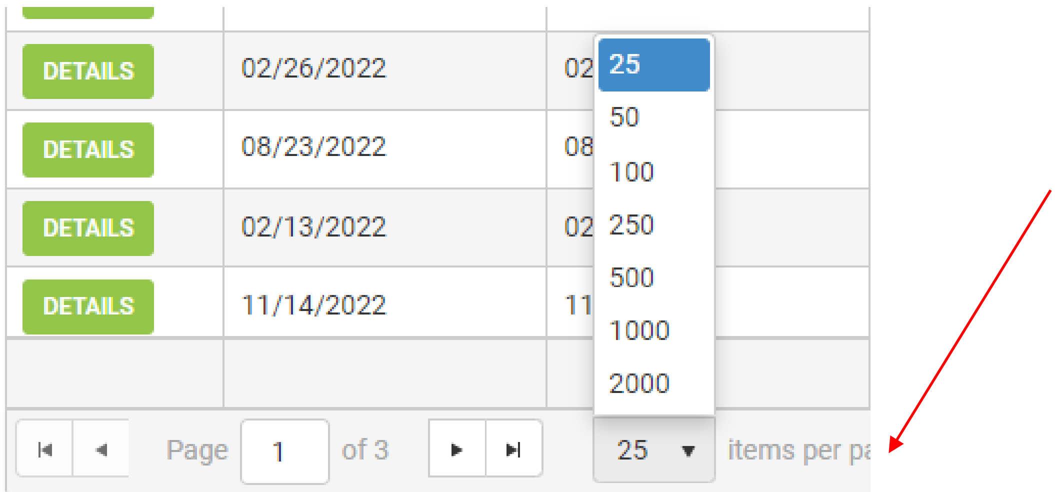


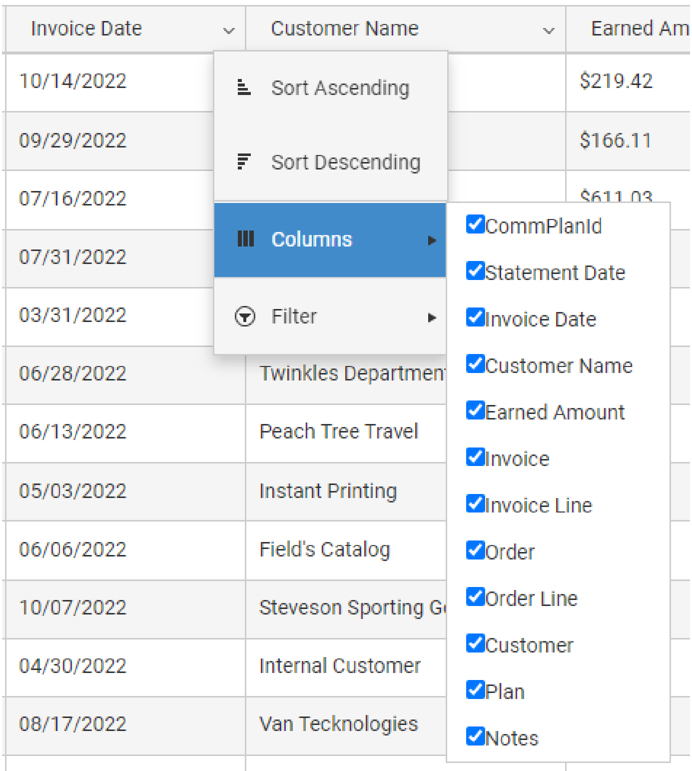
This grid displays all transactions that meet the search filter criteria.

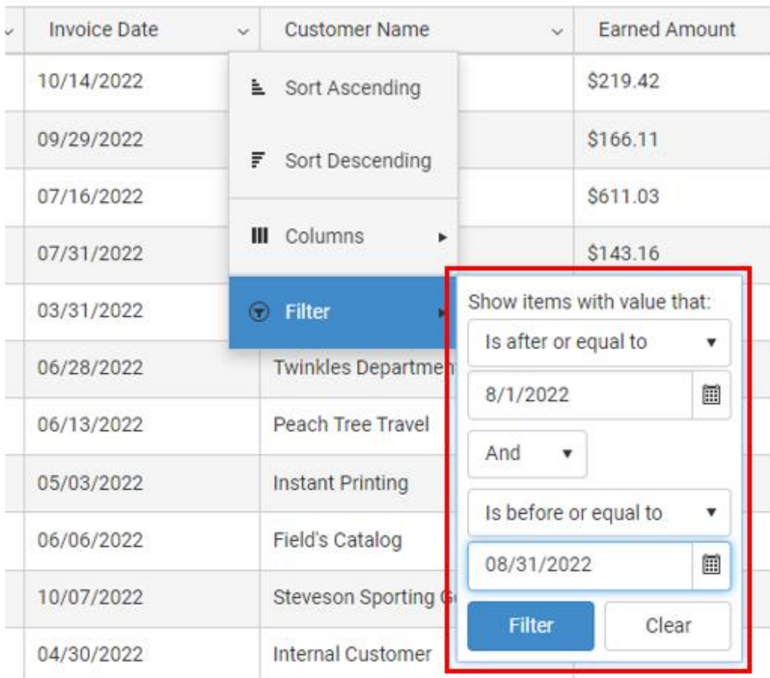
SUMMARY TOTALS

Above the Grid View is a collection of data summarizing the details of the Grid View table.

FIELD LABEL	
SELECTED PERSON	Persons name for which the bar in the histogram was selected.
EARNED	The calculated Earned amount for the transactions, as defined by the Sales Plan, for the bar that was selected.
PAID	The calculated amount of all transactions that have been paid for the bar that was selected.
UNPAID	The calculated amount of all transactions that have NOT YET been paid for the bar that was selected.
READY TO PAY	The calculated amount of all transactions that meet the condition(s) to be paid for the bar that was selected.

STEP	ACTION
6.	GRID VIEW (ADVANCED FEATURES – PAGE CONTROL) Typically, many Payments will accumulate over time and the number of transactions will exceed the page length on the grid. The Page Control exists at the bottom of the Grid View…  The number of records on a page can be changed by clicking the Items per Page pop-up list. Pages can be navigated by clicking the forward and back buttons on the page control. 

STEP	ACTION
7.	GRID VIEW (ADVANCED FEATURES – COLUMN CONTROL) In addition to the Search Filters described in step 5 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. 

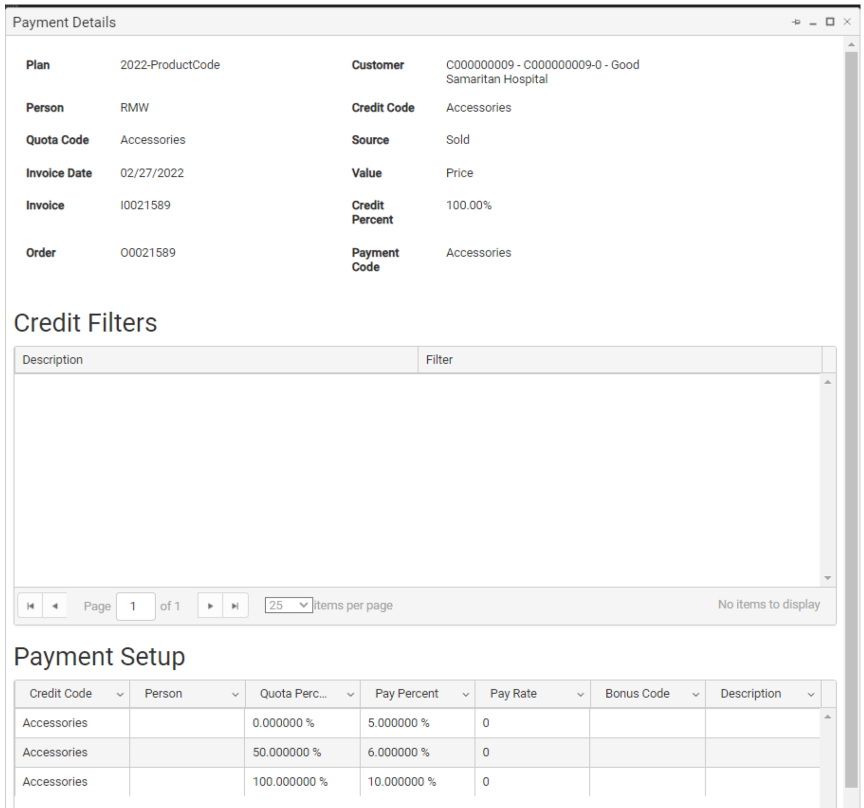
STEP	ACTION
8.	GRID VIEW (COLUMN CONTROLS – CONTINUED) You can also apply individual filters to each column to narrow your search criteria even further using the Filter wizard. 

STEP	ACTION

9.

GRID VIEW (DETAILS Button)

The DETAILS button  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.



10.

GRIDVIEW COLUMN DEFITIONS

All rows in the table are specific to the bar that is selected within the Historgram.

Name: Name of the salesperson
Plan: Name of the Sales Plan currently being displayed
Invoice Date: Date on which the invoice was created.
Statement Date: Posting date of the transaction. Typically, the same as Invoice or Order Date.
Invoice: Invoice number assigned from host-ERP system
Invoice Line: Invoice line number
Order: Order number assigned from host-ERP system
Order Line: Order line number
Customer: The customer ID or account number.
Name: Name of customer on the Order and Invoice.
Bonus Code: The Bonus Type (or code) earned based on the transaction.
Pay Amount: The payment amount earned for the transaction.
Hold for Payment: Indicates the transaction will be held until payment in full has been

	received from the Customer. **Hold**: a Status field manually set by Sales Management or Accounting to place a Payment record on hold to prevent it from being processed in a payroll batch. **Payroll Code**: The payroll batch number for which the Pay Amount was processed and paid. Notes: Any notes applied