



USER GUIDE SALESPERSON DASHBOARD

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ABOUT THIS GUIDE

This document contains the definition of terms and the general use of IncentViz by a salesperson or other entity that receives compensation calculated and reported by the IncentViz application. The Salesperson Dashboard within IncentViz is a user interface into these calculations and provides the ability for the user to access their sales performance, quota attainment (quota credit), commissions earned/due/paid, and generate commission statements on-demand 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

The intended audience for this document is any salesperson that will be using IncentViz. However, it is also useful for any sales manager or accounting role to be familiar with the Salesperson Dashboard as well.

Required Knowledge / Pre-requisites

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

- IncentViz – User Interface Guide
- (Optional) IncentViz – Understanding a Sales Plan
- (Optional) 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.

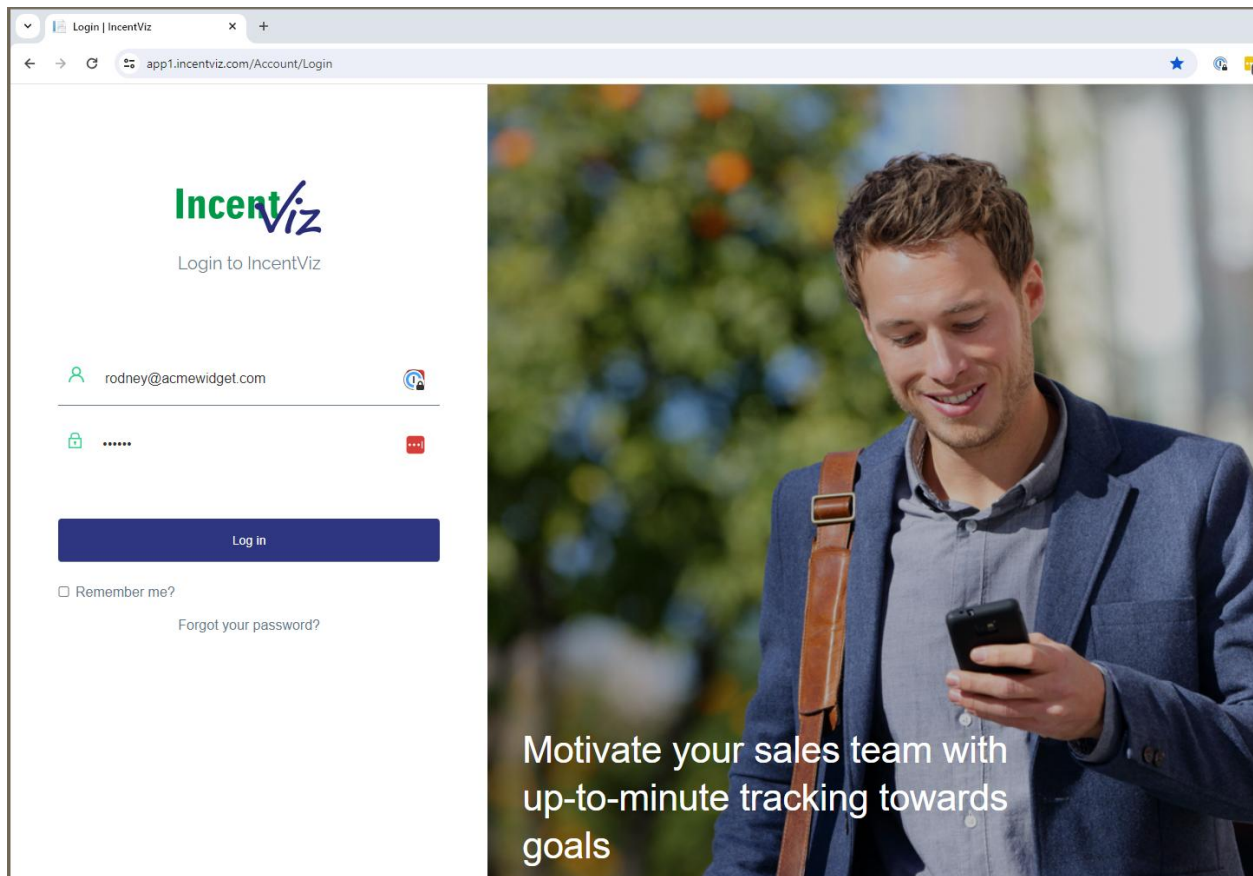
Qualified Transactions Only!

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 or accounting department. A user ID and password will have also been provided.

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

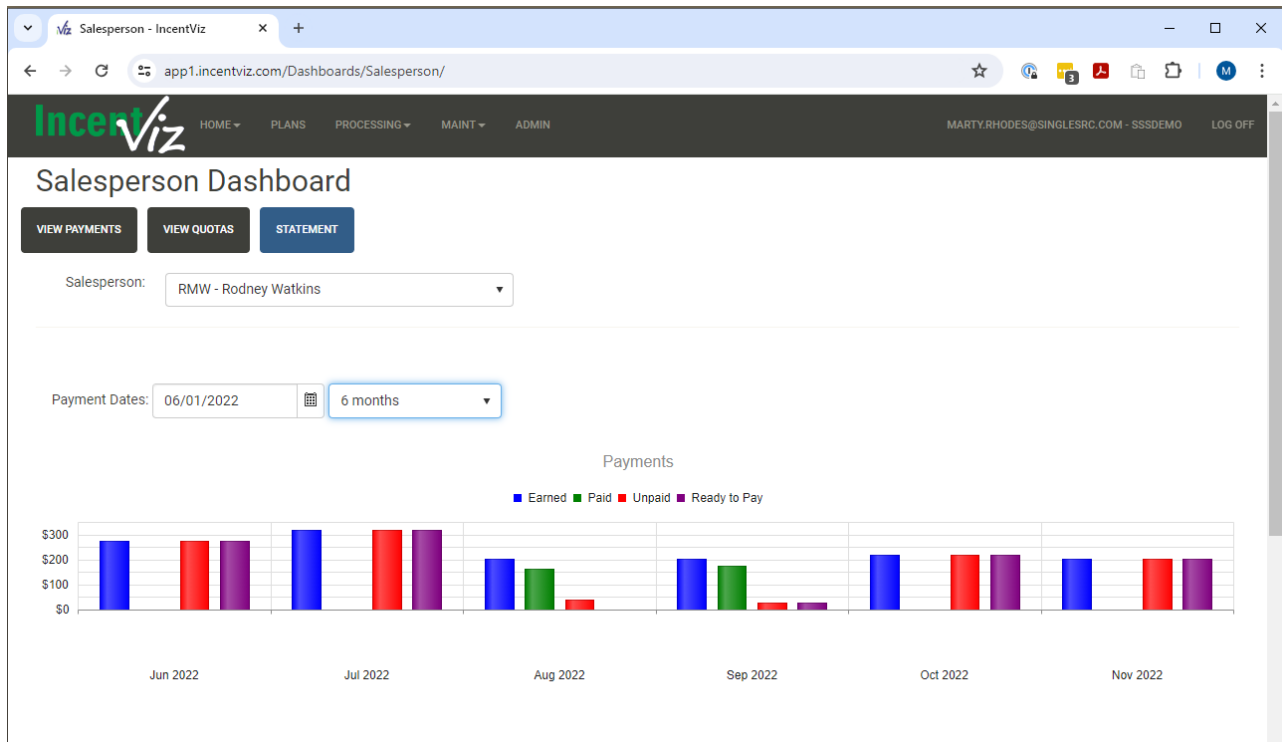
In the second field, enter your PASSWORD.

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 your sales or accounting department member responsible for administering IncentViz.

Upon successful login, you will be presented with the Salesperson Dashboard that looks similar to the following:



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

USING THE SALESPERSON DASHBOARD

OVERVIEW

Check Sales Performance and Quota Attainment (Credit)

Use the [VIEW QUOTAS](#) feature (button) of the Salesperson Dashboard to view and report on sales performance (Quota Credit) and compare the values to the specific Quota assigned to you.

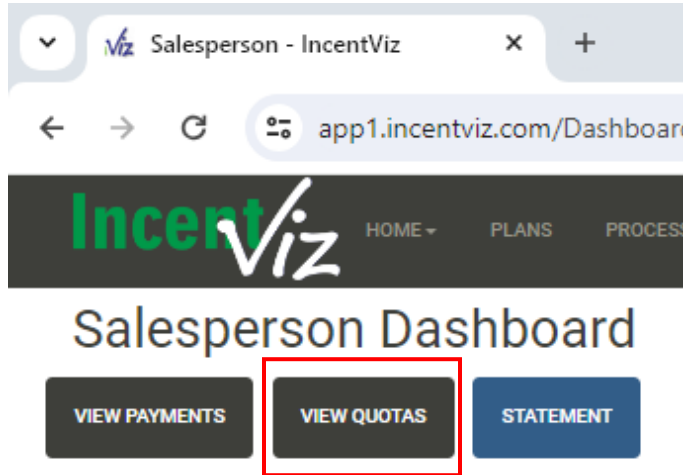
Check Commission or Variable Compensation Earned, Due, and Paid

Use the [VIEW PAYMENTS](#) feature (button) of the Salesperson 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

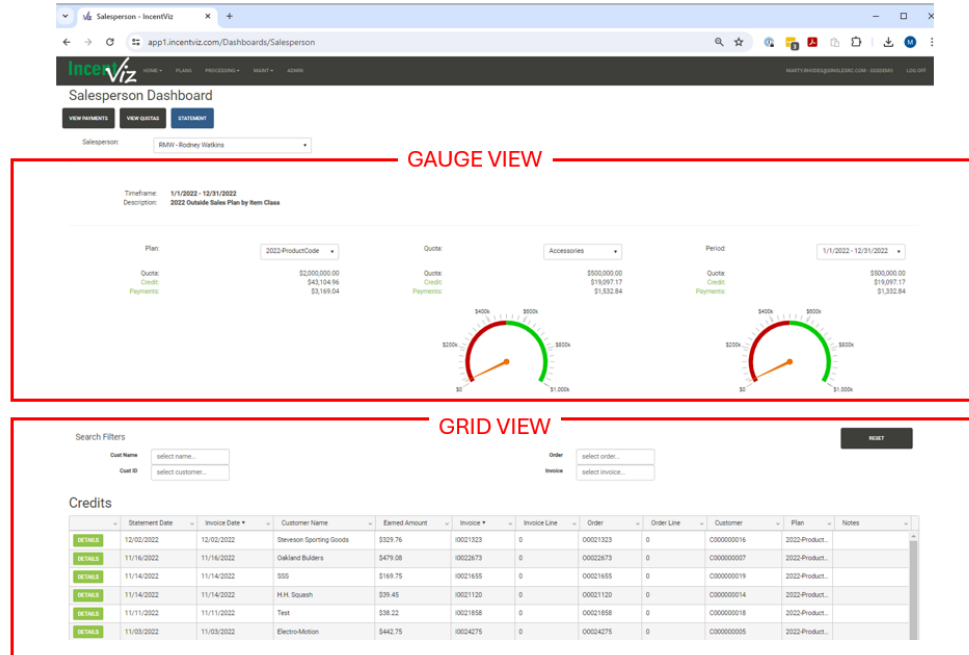
Quota Credit amounts generated by qualifying transactions (refer to your specific Sales Plan to understand these conditions) are automatically created as soon as the order and invoicing transaction(s) have been processed and completed in your host-ERP system.

Sales performance is measured as a comparison of a salesperson's quota established in a Sales Plan and all sales 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 Salesperson Dashboard.

STEP	ACTION
1	Verify you are logged in to IncentViz to access the Salesperson Dashboard
2	<div>Click the VIEW QUOTAS button in upper left-hand corner of the Dashboard</div> <div></div> <div>The screen will render the Quota Credit Screen similar to the image in step 3 below.</div>

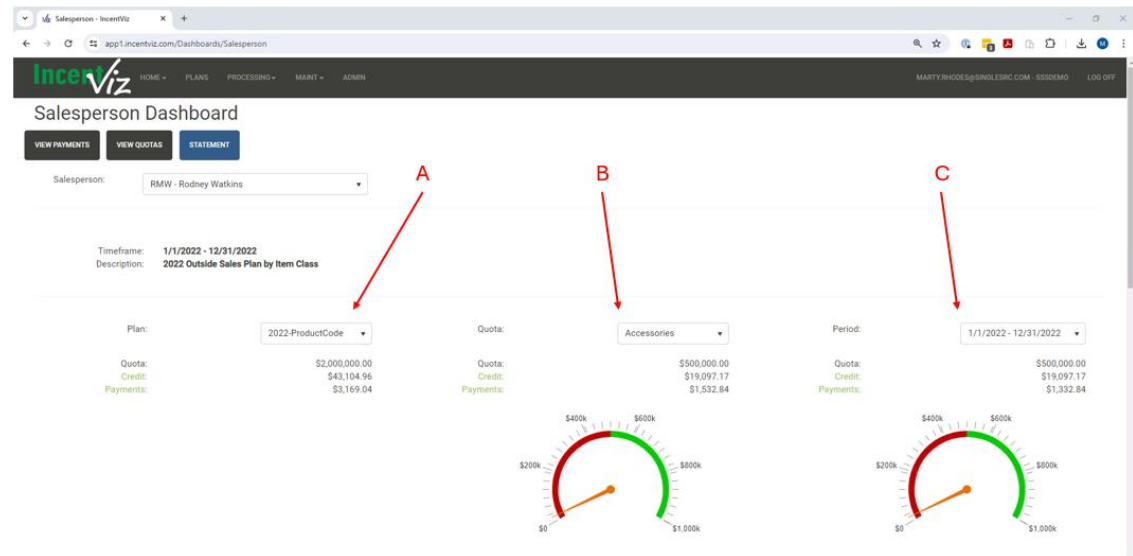
STEP	ACTION
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3



The **VIEW QUOTAS** Dashboard contains a Gauge view and Grid view (see separate outlines above)

GUAGE VIEW

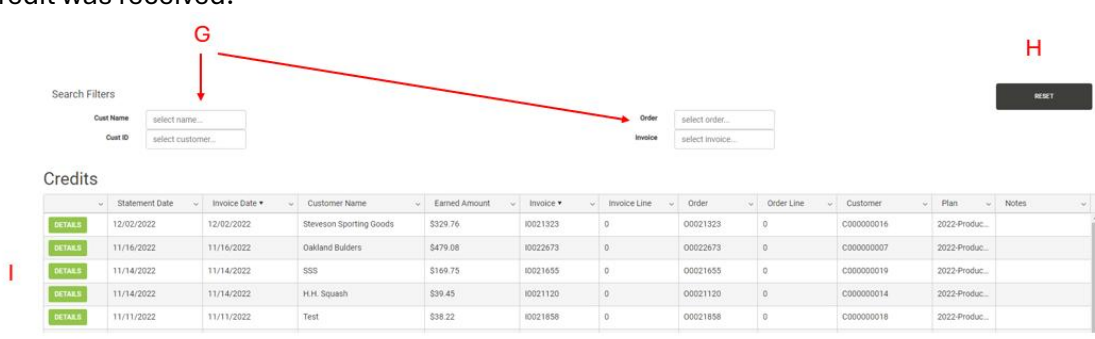


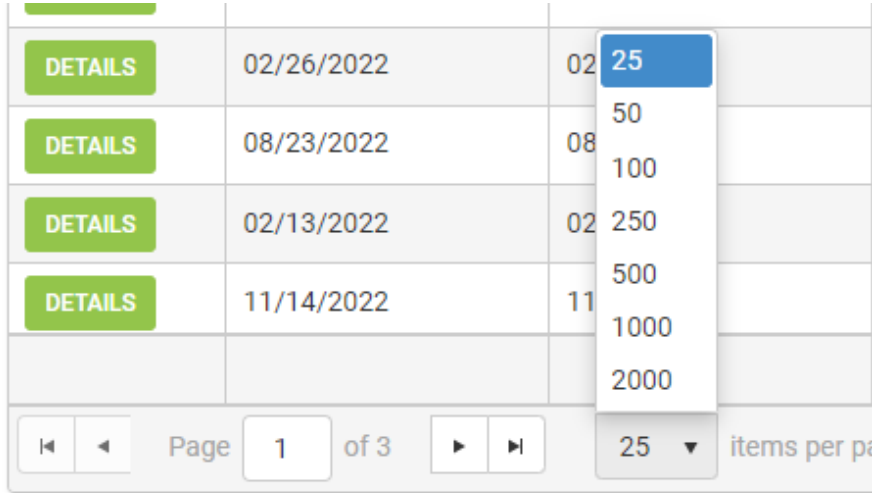

- A. **Sales Plan Selector:** If you have been assigned multiple Sales Plans, use this drop-down list to select the desired Plan.
- B. **Quota Selector:** Each Quota that has been established within the Sales Plan is accessible through this drop down. Select the desired Quota to be viewed.
- C. **Sales Plan Period:** is fixed and cannot be changed.

As you change the Sales Plan selector or Quota selector, the Quota, Credit, and Payments values will change accordingly. The transactions in the Grid View also change as the selector values are changed.

- A. Displays YTD totals for entire Sales Plan.
 - i. *Quota:* aggregate value of all Quotas in the Sales Plan.
 - ii. *Credit:* aggregate value of Quota Credit attained for all Quotas in the Sales Plan.
 - iii. *Payments:* aggregate value of all Payments Earned for all Quotas in the Sales Plan.
- B. Displays YTD totals for the selected Quota
 - i. *Quota:* value of Quota selected
 - ii. *Credit:* value of Quota Credit for Quota selected
 - iii. *Payments:* value of all Payments Earned for selected Quota

STEP	ACTION
	<div> <div> Timeframe: 1/1/2022 - 12/31/2022 Description: 2022 Outside Sales Plan by Item Class </div> <div> <div> Plan: 2022-ProductCode ▼ Quota: \$2,000,000.00 Credit: \$43,104.96 Payments: \$3,169.04 </div> <div> Quota: \$500,000.00 Credit: \$19,097.17 Payments: \$1,532.84 </div> <div> Period: 1/1/2022 - 12/31/2022 ▼ Quota: \$500,000.00 Credit: \$19,097.17 Payments: \$1,332.84 </div> </div> <div> <div> D </div> <div> E </div> <div> F </div> </div> <div> D. Sales Plan Total YTD E. Quota Total YTD F. Quota Totals for Period </div> </div>

STEP	ACTION
5.	<p>GRID VIEW</p> <p>The grid view displays all Quota Credit transactions which are related to the A) <i>Sales Plan B) Quota</i> and C) <i>Sales Plan Period</i> specified in the Guage View settings (step 4 above).</p> <p>All transactions displayed in the Grid View meet the conditions set forth in the Quota Credit definition of the Sales Plan. These transactions represent the individual Quota Credit values for which the Salesperson will receive.</p> <p>NOTE: if a transaction is expected, but is not included in the Grid View, then NO Quota Credit was received.</p>  <p>G. The Grid View provides the ability for the user to search for a subset of transactions. Transactions can be filtered by Customer Name, Customer ID, Order #, or Invoice #.</p> <p>H. To reset the search filters, click the Reset button</p> <p>I. This grid displays all transactions that meet the search filter criteria. By default (empty Search Filter fields), the Grid View contains all transactions related to the Sales Plan, Quota, and Sales Plan Period selected in the Guage View.</p>
6.	<p>GRIDVIEW COLUMN DEFITIONS</p> <p>Statement Date: Posting date of the transaction. Typically, the same as Invoice or Order Date.</p> <p>Invoice Date: Date on which the invoice was created.</p> <p>Customer Name: Name of customer on the Order and Invoice.</p> <p>Earned Amount: The Quota Credit earned for the transaction.</p> <p>Invoice: Invoice number assigned from host-ERP system</p> <p>Invoice Line: Invoice line number</p> <p>Order: Order number assigned from host-ERP system</p> <p>Order Line: Order line number</p> <p>Customer: Customer number or ID associated with the customer account in the host-ERP</p> <p>Plan: name of the Sales Plan currently being displayed</p> <p>Notes: Notes added in IncentViz to the transaction by sales management or accounting</p>

STEP	ACTION
7.	<p>GRID VIEW (ADVANCED FEATURES – PAGE CONTROL)</p> <p>Typically, a large number of transactions 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...</p>  <p>The number of records on a page can be changed by clicking the Items per Page pop-up list.</p> <p>Pages can be navigated by clicking the forward and back buttons on the page control.</p> 

STEP

ACTION

8.

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.

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	
07/02/2022	Peach Tree Travel	\$100.40

STEP ACTION

9.

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.

Invoice Date	Customer Name	Earned Amount
10/14/2022		\$219.42
09/29/2022		\$166.11
07/16/2022		\$611.03
07/31/2022		\$143.16
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 Goods	
04/30/2022	Internal Customer	

Sort Ascending
Sort Descending
Columns
Filter

Show items with value that:

Is after or equal to
8/1/2022

And

Is before or equal to
08/31/2022

Filter Clear

STEP	ACTION
------	--------

10.

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

Quota Credit Details

Plan	2022-ProductCode	Customer	C000000001 - C000000001-0 - BETZ Labs
Person	RMW	Credit Code	Accessories
Quota Code	Accessories	Source	Sold
Invoice Date	10/14/2022	Value	Price
Invoice	I0020100	Credit Percent	100.00%
Order	O0020100		

Credit Filters

Description	Filter
	Item.ProductCode = Accessories

Page 1 of 1

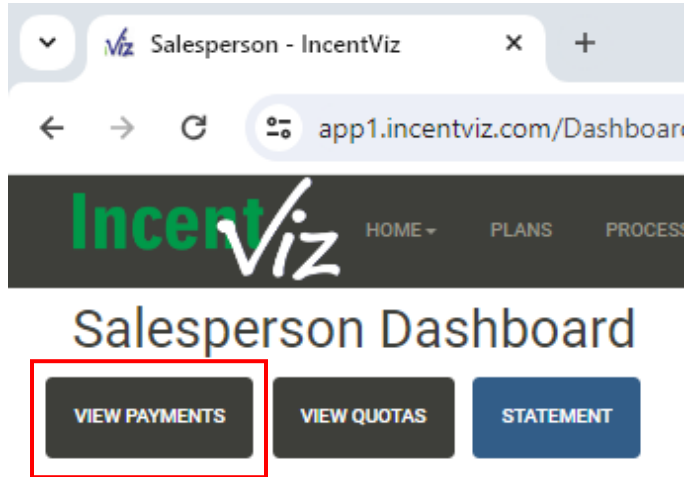
25 items per page

1 - 1 of 1 items

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

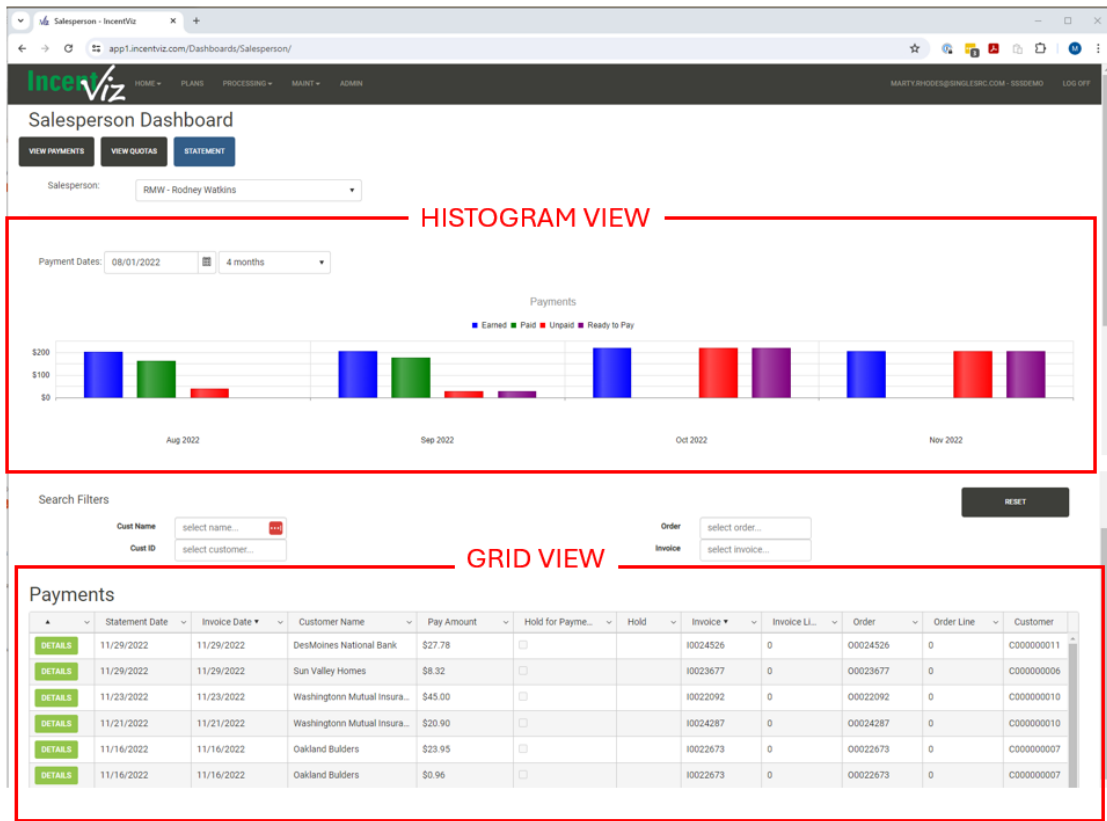
Payments generated by qualifying transactions (refer to your specific Sales Plan to understand these conditions) are automatically created as soon as the order and invoicing transaction(s) have been processed and completed in your host-ERP system.

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, you will use the VIEW PAYMENTS feature within the Salesperson Dashboard.

STEP	ACTION
1	Verify you are logged in to IncentViz to access the Salesperson Dashboard
2	<div>Click the VIEW PAYMENTS button in upper left-hand corner of the Dashboard</div> <div>A screenshot of a web browser showing the IncentViz Salesperson Dashboard. The browser's address bar displays 'app1.incentviz.com/Dashboard'. The dashboard header includes the IncentViz logo and navigation links for HOME, PLANS, and PROCESS. Below the header, the title 'Salesperson Dashboard' is centered. At the bottom of the dashboard, there are three buttons: 'VIEW PAYMENTS' (highlighted with a red rectangular box), 'VIEW QUOTAS', and 'STATEMENT'.</div> <div>The screen will render the Payments Screen similar to the image in step 3 below.</div>

STEP ACTION

3

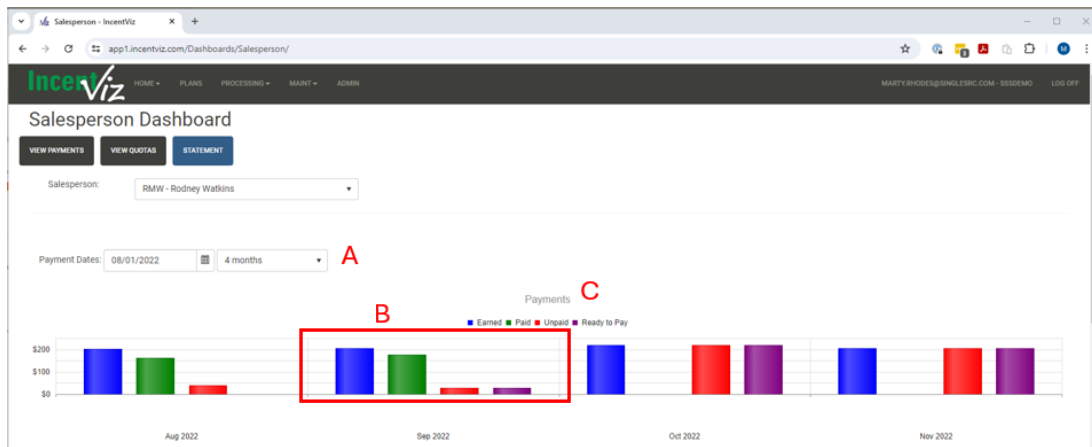


The **VIEW PAYMENTS** Dashboard contains a Histogram view and Grid view (see separate outlines above).

STEP ACTION

4

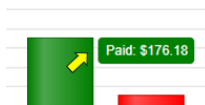
HISTOGRAM VIEW

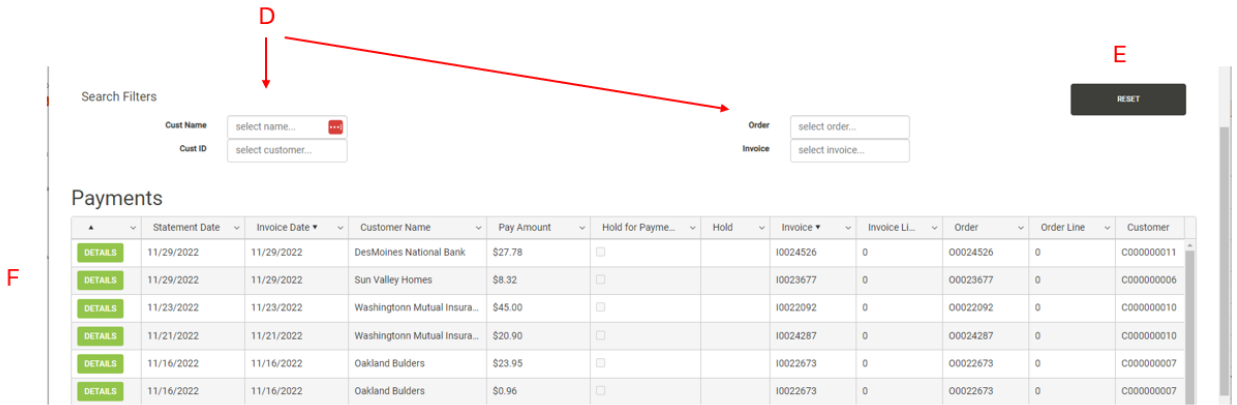


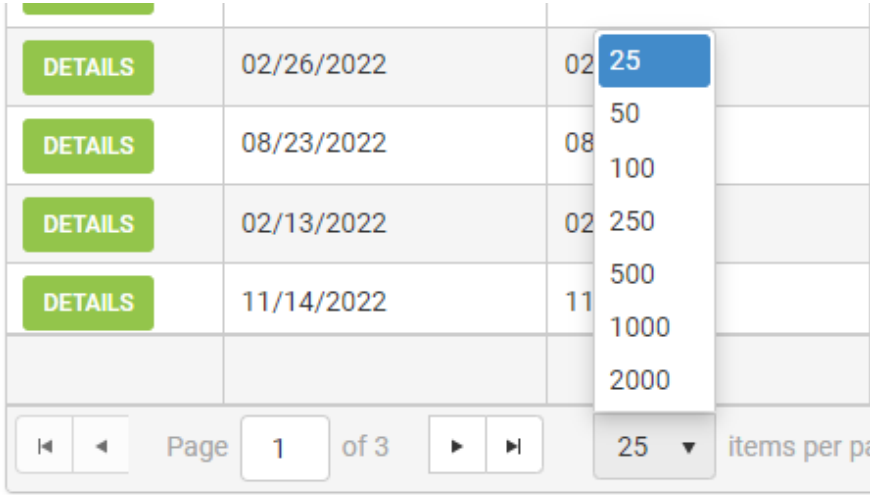

- A. **Timeline Selector:** The Timeline Selector utilizes two fields. The first is the desired Start Date of the histogram and the second field specifies the number of periods to be displayed in the histogram. The values in these fields also filter the transactions that are displayed in the Grid View by the specified data range.
- B. **Period Display:** A period, typically a month 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.
- C. **Color Legend:** Legend to reflect the color coding for the different Payment values reflected in the bar graph.

As you change the Timeline selector, 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 hover over a bar graph will display the value of that specific Payment value.



STEP	ACTION
5.	<p>GRID VIEW</p> <p>The grid view displays all Payment transactions which are related to the <i>Timeline Selector</i> (step 4 above).</p> <p>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.</p> <p>NOTE: if a Payment transaction is expected, but is not included in the Grid View, then NO Payment calculation occurred.</p>  <p>D. The Grid View provides the ability for the user to search for a subset of transactions. Transactions can be filtered by Customer Name, Customer ID, Order #, or Invoice #.</p> <p>E. To reset the search filters, click the Reset button.</p> <p>F. This grid displays all transactions that meet the search filter criteria. By default (empty Search Filter fields), the Grid View contains all Payment transactions related to the Timeline Selector values.</p>
6.	<p>GRIDVIEW COLUMN DEFINITIONS</p> <p>Statement Date: Posting date of the transaction. Typically the same as Invoice or Order Date.</p> <p>Invoice Date: Date on which the invoice was created.</p> <p>Customer Name: Name of customer on the Order and Invoice.</p> <p>Pay Amount: The Quota Credit earned for the transaction.</p> <p>Hold for Payment: Indicates the transaction will be held until payment in full has been received from the Customer.</p> <p>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.</p> <p>Invoice: Invoice number assigned from host-ERP system</p> <p>Invoice Line: Invoice line number</p> <p>Order: Order number assigned from host-ERP system</p> <p>Order Line: Order line number</p> <p>Customer: Customer number or ID associated with the customer account in the host-ERP</p>

STEP	ACTION
7.	<p>GRID VIEW (ADVANCED FEATURES – PAGE CONTROL)</p> <p>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...</p>  <p>The number of records on a page can be changed by clicking the Items per Page pop-up list.</p> <p>Pages can be navigated by clicking the forward and back buttons on the page control.</p> 

STEP

ACTION

8.

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.

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03/31/2022		
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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	
07/02/2022	Peach Tree Travel	\$100.40

STEP ACTION

9.

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.

✓	Invoice Date	Customer Name	Earned Amount
	10/14/2022		\$219.42
	09/29/2022		\$166.11
	07/16/2022		\$611.03
	07/31/2022		\$143.16
	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 Goods	
	04/30/2022	Internal Customer	

Show items with value that:

Is after or equal to ▼

8/1/2022

And ▼

Is before or equal to ▼

08/31/2022

Filter Clear

STEP	ACTION
------	--------

10.

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

Payment Details

Plan

2022-ProductCode

Customer

C000000011 - C000000011-0 - DesMoines National Bank

Person

RMW

Credit Code

Machines

Quota Code

Machines

Source

Sold

Invoice Date

11/30/2022

Value

Price

Invoice

I0024526

Credit Percent

100.00%

Order

O0024526

Payment Code

Machines

Credit Filters

Description

Filter

Item.ProductCode = Machines

Page 1 of 1

25 items per page

1 - 1 of 1 items

Payment Setup