(21A) Oracle CX Sales: Incentive Compensation

Oracle CX Sales and B2B Service

DURATION	MODULES	COURSE CODE
3 Days	**18 Lectures**	**—**

Course Overview

This Oracle Incentive Compensation training is a three-day, hands-on course that teaches you how to create the components needed for a compensation plan and assign the plan to participants.

What You Will Learn

Course Introduction

- Learning Objectives
- Instructor and Class Participants
- Course Audience
- Course Prerequisites
- Course Goal
- Course Objectives
- Course Methodology
- Course Materials
- Course Agenda
- Resources: Documentation
- Resources: My Oracle Support

Overview

- Learning Objectives
- Sales Performance Management Features
- What is Incentive Compensation?
- Oracle Incentive Compensation Flow
- Participants
- Compensation Plan
- Transactions
- Credit Rules
- Processing

- Compensation Plan Building Blocks
- Creating Compensation Plans
- Lesson Highlights

Compensation Plans and Performance Measures

- Learning Objectives
- Compensation Plan Building Blocks
- Compensation Plans
- Plan Components
- Performance Measures
- Goals
- Goal: Example
- Credit Categories
- Measure Formulas
- Measure Formula Example
- Scorecards
- Scorecard: Example
- How Does It All Fit Together?
- Lesson Highlights
- Practice

Incentive Formulas and Rate Tables

- Learning Objectives
- Compensation Plan Building Blocks
- Incentive Formula
- Create Incentive Formulas
- Rate Table
- Rate Table Dimension Types
- Rate Dimension Examples
- Create a Rate Table
- How Incentive Formulas Use Rate Tables
- Example: Individual Transactions, No Running Total
- Example: Individual Transactions, Running Total
- True Up
- Example: Individual Transactions, Running Total, True Up, Quarterly Intervals
- Example: Transactions by Interval, Running Total, Quarterly Intervals
- Additional Dimensions
- Multidimensional Rate Table
- Split Attainment: No Split Attainment
- Split Attainment: Fixed (Step Rate)
- Split Attainment: Proportional (Interpolated Rate)
- Lesson Highlights
- Practice

Participants, Roles, and Assignments

- Learning Objectives
- Participants
- HCM Foundation
- Create Internal Participants
- Create External Participants
- Steps to Import Participants
- Map User Attributes to Participant Attributes
- Use Selection Rules to Import Participants
- Participant Details Import
- Populating and Uploading the Import File
- Delete Participants
- Add Participants to Compensation Plans
- Incentive Compensation Roles
- Create a Role
- Assign Incentive Compensation Roles
- Assign Participants
- Create Assignment Rules
- Run Assignment
- Lesson Highlights
- Practice

Automated Role Assignments

- Learning Objectives
- Incentive Compensation Roles
- Business Value
- Automated Role Assignments
- Configure Assignment Rules
- Prerequisites
- Configure Automated Role Assignment
- 5. Set the Approval Options
- 6. Create a Rule Hierarchy
- 7. Run Assignment
- 8. If Necessary, Review and Approve Assignments
- Preserve Role Assignments
- Lesson Highlights
- Practice

Sales Crediting

- Learning Objectives
- What is Sales Crediting?
- Sales Credit Allocation
- Sales Crediting
- How Much is Appropriate?

- Credit Rule Hierarchy
- Credit Rule Qualifiers
- Credit Rule Scoring
- Example: Credit Rule Scoring
- Recommended Practice for Building Your Hierarchy
- Optional: The Rollup Rule Hierarchy
- Team Crediting
- Deploy Credit Rules
- Lesson Highlights
- Practice

Classification

- Learning Objectives
- Classification
- Create Credit Categories
- Classification Rules
- Classification Rules: Example
- Create Classification Rules
- Classification Process
- Lesson Highlights
- Practice

Processing Transactions

- Learning Objectives
- Transactions
- Incentive Compensation Processing Lifecycle
- Import Management
- Oracle Data Integrator
- Collect Transactions
- Adjusting Transactions – Inline Edit
- Incentive Compensation Processing Lifecycle
- Sales Crediting
- Sales Crediting Example
- Rollup
- Rollup Example 1
- Rollup Example 2
- Incentive Compensation Processing Lifecycle
- Classification Rules
- Classification Process
- Lesson Highlights
- Practice

Earning Transactions

- Learning Objectives

- Incentive Compensation Processing Lifecycle
- Review: Performance Measure
- Calculation Process
- Eligibility
- Calculation Phase
- Calculation Process
- More Transaction Examples
- Complete versus Incremental Calculation
- Tracing Earnings
- Earning Traceability – Calculation Detail
- Debugging Eligibility Errors
- Lesson Highlights
- Practice

Advanced Calculations and Expressions

- Learning Objectives
- Expressions
- Expression Builder
- Available Function Types
- Aggregate Functions
- Comparison Functions
- Number Functions
- Logical Functions
- Null Function
- User-Defined Functions
- If-Then-Else Logic
- The DECODE Statement
- "If-Then-Else" via Rate Tables and Scorecards
- Value Set Queries
- Lesson Highlights
- Practice

Objectives-Based Performance Incentives

- Learning Objectives
- Objectives-based Performance Incentives
- Business Value
- Types of Objectives
- Objectives-based Performance Incentives
- Assessment Flow
- Assessments
- Questions
- Question Weight
- Responses
- Response Score and Rating
- Assessment Score

- Assessment Graph
- Score Range Attributes
- Create an Assessment Template
- 1. Create the Template
- 2. Configure the Ratings
- 3. Enter Question Groups, Questions, and Responses
- 4. Set or Verify Question Weights
- 5. Enter Score Feedback
- 6. Deploy the Template
- Assign Objectives to a Compensation Plan
- Processing Assessments
- Lesson Highlights
- Practice

Individualize Compensation Components

- Learning Objectives
- Individualize Compensation Plans
- Individualize a Plan
- 1. Navigate to the Participant's Plan
- 2. Individualize Target Incentive and Percentage
- 3. Individualize Plan Component or Measure Commission Rates
- 4. Individualize Participant Goals
- 5. Individualize Credit and Transaction Factors
- 6. Individualize Terms and Conditions
- Plan Document Approval and Acceptance Process
- Plan Document Approval and Acceptance Settings
- How Plan Documents Are Approved and Accepted
- Lesson Highlights
- Practice

Payment Processing

- Learning Objectives
- Incentive Compensation Processing Lifecycle
- Payment Process
- Payment Components
- Payment Plans
- Payment Plan Categories
- Payment Plan Settings
- Payment Plan: Example
- Pay Groups
- Payment Batches
- Paysheets
- Paysheet Approval
- Paysheet Approval Parameters
- Payment Procedure

- How Paysheets are Approved
- Review Earning Calculation
- Participant Alternate Payee
- Dispute Management and Approval Actions
- Dispute Processing
- Create
- Reassign and Delegate
- Request More Information
- Update Information
- Approve or Reject
- Escalate
- Withdraw
- Lesson Highlights
- Practice

Reports and Analytics

- Learning Objectives
- Oracle CX Sales Analytics – Summary
- Predefined Analytics Content
- Examples of Predefined Analyses
- Advantages of Analytics
- Sales Compensation Work Area
- "My Team's Compensation" Work Area
- Reports and Analytics
- Business Intelligence Report Composer
- Mobile Analytics
- Mobile Prerequisites
- Lesson Highlights
- Practice

Importing and Exporting Data

- Learning Objectives
- Overview of Import/Export
- Import Incentive Compensation Participants
- Import Incentive Compensation Participant Details
- Import Incentive Compensation Participant Goals
- Manage Incentive Compensation Participants Role Assignment
- Import Incentive Compensation Currency Conversion Rates
- Export Incentive Compensation Payments
- Export Incentive Compensation Earnings
- Lesson Highlights

Extending Incentive Compensation

- Learning Objectives

- Flexfield
- Flexfield Terminology
- Working Example: The Base Transaction Descriptive Flexfield
- Make an Additional Attribute Available to an Object
- 1. Select the Flexfield to Edit
- 2. Select an Attribute That is Not Being Used
- 3. Configure the Segment
- 4. Deploy the Flexfield
- 5. Verify the Results
- Value Sets
- Create or Select a Value Set for a Flexfield Segment
- 1. Select the Segment to Edit
- 3. Create or Select a Value Set for That Segment
- 4. Deploy the Flexfield
- 5. Test the Results
- Enable Segments for Crediting and Classification
- Enable the Segment for the Calculation Process
- Lesson Highlights
- Practice

Setting up Your Company's Environment

- Learning Objectives
- Key Implementation Concepts
- Offerings
- Enable the Offerings
- Tasks
- Run a Task from Within an Offering
- Implementation Projects
- Run a Task from within an Implementation Project
- Run a Task from the Setup and Maintenance Search Page
- Incentive Compensation Tasks
- Manage Parameters
- Manage Calendars
- Create the Calendar
- Assign a Calendar to a Business Unit
- Edit the Period Status Within the Business Unit
- Create Calendar Periods
- Lesson Highlights
- Practice