

## Oracle Sales Cloud: Incentive Compensation

**Duration:** 5 Days

### What you will learn

Oracle Sales Cloud: Incentive Compensation provides you with the knowledge and skills required to effectively implement, configure and use Oracle Fusion Incentive Compensation. Through lectures, discussions, demonstrations, and hands-on activities, you'll deep dive into a variety of topics with expert Oracle instructors.

This course is relevant for any customers using Fusion Applications through Release 11.1.7

This course is appropriate for both Oracle Cloud and on-premises deployments.

### Learn To:

Configure incentive compensation plans and classification, credit and rollup rules.

Assign incentive and draw plans.

Manage processes and workloads.

Approve and distribute payments.

Monitor performance and review incentive results.

Set up Oracle Fusion Incentive Compensation and manage incentive compensation business processes.

Benefits to You Enrolling in this class and developing new skills will ensure a smooth, rapid implementation of Fusion Incentive Compensation. You'll walk away with a deeper understanding of configuration options so you can make better decisions during your implementation. You'll know how to efficiently use and manage Oracle Fusion Incentive Compensation to assure effective administration of your sales incentive programs.

### Master Functional Tasks

Incentive compensation functional tasks include: creating and managing compensation and payment plans as well as classification, crediting and rollup rules; importing, maintaining and assigning participants and generating credit, earnings and payment transactions, as well as distributing payments.

### Learn How to Complete Setup Tasks

This course will teach you how to successfully complete tasks, which include: configuring common components like enterprise structures, security, persons, parties, geographies, approvals, Oracle Fusion Help, application toolkit and common reference objects. Expert Oracle University instructors will also teach you how to perform setup tasks for incentive compensation shared configurations, business units and custom qualifiers and lookups. Furthermore, you'll examine incentive compensation functional tasks and transaction processing, as well as setup tasks.

### Audience

Configuration Consultant

Configuration Implementer

End Users  
Functional Implementer  
Implementation Consultant  
System Administrator  
Technical Administrator  
Technical Consultant

## Related Training

### *Suggested Prerequisites*

Fusion Applications: Functional Setup Manager for Implementer

Fusion Applications: Security Fundamentals

Fusion Applications: Security Fundamentals Ed 1

## Course Objectives

Test your setup by entering data and performing common Incentive Compensation processes

Use Oracle Fusion Incentive Compensation (IC) to perform functional (or transactional) tasks

Identify the key concepts of Incentive Compensation that determine a successful implementation

Use Oracle Fusion Functional Setup Manager (FSM) to implement Incentive Compensation

## Course Topics

### **Incentive Compensation Course Overview**

Lesson and Course Objectives  
Course Schedule  
Outline of Course Hands-On Activities  
Oracle Fusion Resources

### **Introducing Oracle Fusion Applications and Incentive Compensation**

Introduce Oracle Fusion Applications User Interface  
Introduce Oracle Fusion Customer Relationship Management, Human Capital Management, and Incentive Compensation  
Introduce the Manage Incentive Compensation Main Business Activities  
Introduce Incentive Compensation Transaction Processing

### **Model and Configure Incentive Plans**

Compensation Plans and Building Blocks Overview  
Rate Tables and Dimensions  
Expressions  
Performance Measures  
Classification Rules and Credit Category Hierarchies

### **Assign Participants**

Introducing Participants, Plans, and Pay Groups

### **Credit Participants**

What is Sales Crediting?

How Much Is Appropriate?

Crediting Defined

Oracle Fusion Incentive Compensation Crediting

### **Activity: Credit, Classify, Calculate Earnings, and Determine Payments**

Incentive Compensation Processing Lifecycle

Base Transactions

Credited and Classified Transactions

Earnings and Payment Transactions

### **Transaction Lifecycle**

Importing, Collecting, and Managing Transactions

Crediting

Rollup

Classification

Calculation

Payment Entities and Processes Overview

Payment Transactions

### **Sales Compensation**

Monitor Participant and Team Performance

Manage Disputes

### **Introducing Oracle Fusion Functional Setup Manager**

Application Implementation Lifecycle

Functional Setup Enterprise Roles

Planning an Implementation

Configuring Offerings

Generating Setup Task Lists

Assigned Implementation Tasks

Maintaining Setup Data

Accessing Implementation Projects and Tasks

### **Define Enterprise Structures for Incentive Compensation**

Oracle Fusion Applications Business Units and Business Functions

Reference Data Sharing

Reference Data Partitions

Workforce Structures: Jobs and Job Families

Incentive Compensation and HCM Jobs

### **Define Security and Persons for Incentive Compensation**

IC Security Setup and Maintenance

Roles Assigned to Users

Role-Based Access Control

Job and Duty Roles

Manage Incentive Compensation Main Business Activities

The Security Reference Implementation

User Accounts and Role Provisioning

## **Define Trading Community Details for Incentive Compensation**

Customer Data Model Data and Incentive Compensation Rules  
How Oracle Fusion IC Uses Geography Reference Data  
Implementation Considerations  
Manage Geographies  
File-Based Import Process

## **Define Parties and Resources for Incentive Compensation**

Why Parties and Resources?  
Importing Customer Data Flow  
Partner, Person, and Resource Application Data  
Parties and Party Relationships and Data Model  
How Data Objects Reference Each Other  
Using Text and XML Files for Import

## **Maintain Common Reference Objects**

Application Taxonomy Overview  
Define ISO Reference Data  
Profile Options, Levels, and Values  
Lookups  
Flexfields  
Value Sets  
Set Activity Stream  
Manage Menu Customizations

## **Define Incentive Compensation Shared Configuration**

Calendar Period Types and Periods  
Multicurrency Support  
Converting IC Currencies

## **Define Incentive Compensation Business Unit Configuration**

Setting Calendar, Currency, and Processing Parameters  
Configuring Tables and Columns  
Enabling Attributes for Calculation  
Manage Earning Types  
Period Statuses  
Participant Import

## **Define Incentive Compensation Custom Qualifiers and Lookups**

Manage Incentive Compensation Custom Qualifiers and Lookups

## **Define Approval Management for Incentive Compensation**

Approval Management Overview  
Setting Up Approval Management  
Manage Task Configurations  
Approval Groups

## **Define Application Toolkit Configuration**

Map Reports to Work Areas

## **Define Extensions for Incentive Compensation (ESS)**

Manage Job Concepts

Updating Custom Processes

Manage List of Values Sources

## **Course Summary**

Key Conceptual Concept Summaries

Transactional Course Activities Summary

Implementation Course Activities Summary