

# Compensation Management

**Epic:** Crediting

**User Story Title:** Determine Crediting Rules for Overlay Reps

**Who?** Compensation analyst

**What?** Determine crediting rules by reviewing system-assigned credit attainment to more than a single direct sales rep

**Why?** Achieve that overlay reps are compensated correctly

**How?** By defining a set of rules against accounts and applying these against bookings

**Description:**

As a compensation analyst, I need to determine crediting rules for overlay reps and determine reps' credit attainment at different levels from direct reps..

This is a critical request, and I will know it's achieved when I can configure overlay rep credit rules differently, at different levels, than direct sales rep rules within the same hierarchy / rule set.

**Complexity Estimate:** Medium

**Level of Effort Estimate:** Medium

**Sprint Cycle:** Sprint 1

**Sprint Points Assigned:** TBD

# Compensation Management

**Epic:** Crediting

**User Story Title:** Use Effective Dating to Determine Whether a Person is Active during the Transaction Date

**Who?** Compensation analyst

**What?** Determine eligibility of credit attainment based on credit hierarchy assignment date and sales rep start or leave of absence dates

**Why?** Ensure credit attainment is correct

**How?** By creating rules that ensure that the credit transaction date falls within the credit hierarchy assignment dates and the sales rep's start and end dates

**Description:**

As a compensation analyst, I need to have a way to include start date, end date, leave of absence start and end date into the effective dating rule that drives crediting.

This is a critical request, and I will know it's achieved when sales representatives receive credit splits based on credit rule assignment dates, on individual start and end dates, and leave of absence dates.

**Complexity Estimate:** Medium

**Level of Effort Estimate:** Medium

**Sprint Cycle:** Sprint 1

**Sprint Points Assigned:** TBD

# Compensation Management

**Epic:** Calculation

**User Story Title:** Calculate Commission and Bonus for Sales Reps for Plan Component for Bookings

**Who?** Compensation analyst

**What?** Calculate commission and bonus based on credit attainment measured for plan components

**Why?** Accurately pay commission and bonus

**How?** By defining and applying calculation rules that are applied against each eligible plan component for sales rep credit attainment

**Description:**

As a compensation analyst, I need to calculate commission and bonus for reps, by component and by bookings.

This is a critical request, and I will know it's achieved when commission and bonuses are calculated based on transactions collected, credited, and measured for each plan component associated to an active comp plan and eligible sales reps.

**Complexity Estimate:** Medium

**Level of Effort Estimate:** Low

**Sprint Cycle:** Sprint 2

**Sprint Points Assigned:** TBD