Profile Center

Sales Profiles

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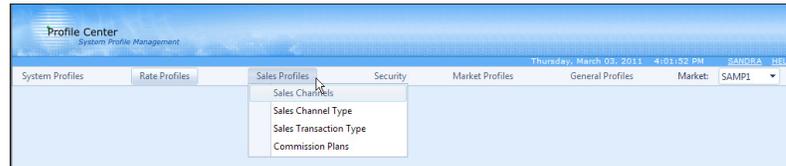
CONTENTS

Profile Center

This document describes the components of the **SALES PROFILE** module found in the Profile Center.

The **PROFILE CENTER** is divided into six modules.

These five modules are used to create profile codes used throughout your database:

- The **SYSTEM PROFILES** module is used to create:

    1. Discounts and Non-Usage Charges
    2. Additional Profile Codes, such as Equipment, Features, Monthly Recurring Changes, and other Profiles that are used throughout the system
    3. Carrier Information codes
    4. And Track Financial Activity

- The **RATES** module is used to create rate tables used to calculate:

    1. Terminating rates
    2. Recurring and Non-Recurring Fees

- The **SALES PROFILES** module is used to create:

    1. Codes representing your Sales Agents
    2. Commission Plans used during production to calculate commissions for your agents
    3. Reports that will assist in paying your agents commissions

- The **SECURITY PROFILES** module is used to create user ids and passwords for your users to access various areas of the system.

- The **MARKET PROFILES** module is used to setup default information used throughout your database. These items include:

    1. System wide messages
    2. State messages
    3. General Market Defaults
    4. Cycle End Dates
    5. Market Settlements

- The **GENERAL PROFILES** module is used to perform various tasks within the system.

Common Profile Buttons

The following buttons are used throughout the Profile center.

The binoculars are used as the **SEARCH** button.

The eraser is used as the **CLEAR SEARCH CRITERIA** button.

The green circular plus is used as the **ADD** button.

The red circular white X is used as the **CLEAR ERROR MESSAGE** button that appears only when an error is encountered and trapped.

The small blue arrow right is used as the **SELECT** button in grids throughout System Profiles. Clicking this button only selects a row; clicking the blue underlined link-description to the right of the arrow does both a select and a go that displays detail for the selected summary record.

The small circular red circular white X is the used as the **DELETE** button in grids throughout System Profiles.

The large green check is used as the **OK** button on pages throughout the Profile Center.

The large red X is used as the **CANCEL** button on pages throughout the Profile Center.

The 'sign forbidden' is used as the 'No' button in popup message boxes where the question 'One or more data fields has changed. Do you wish to save these changes now?' is displayed.

The floppy disk is used as the **SAVE** button. This is the enabled image.

The grayed out floppy disk is used as the **SAVE** button to create a disabled appearance.

The two cylinders are used as the **DUPLICATE** selected Row button to create an exact duplicate of the item selected.
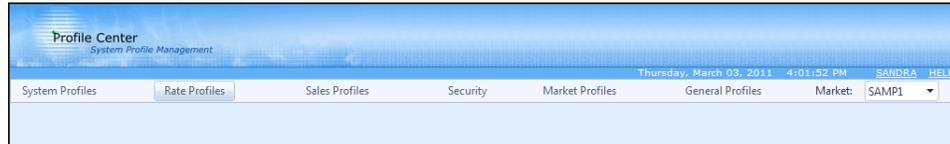
The add button is used where it's permissible to **ADD A NEW ROW** to a grid.

Icons used throughout the Profile Center include a tooltip or a short description specific to the button as you mouse over the item.
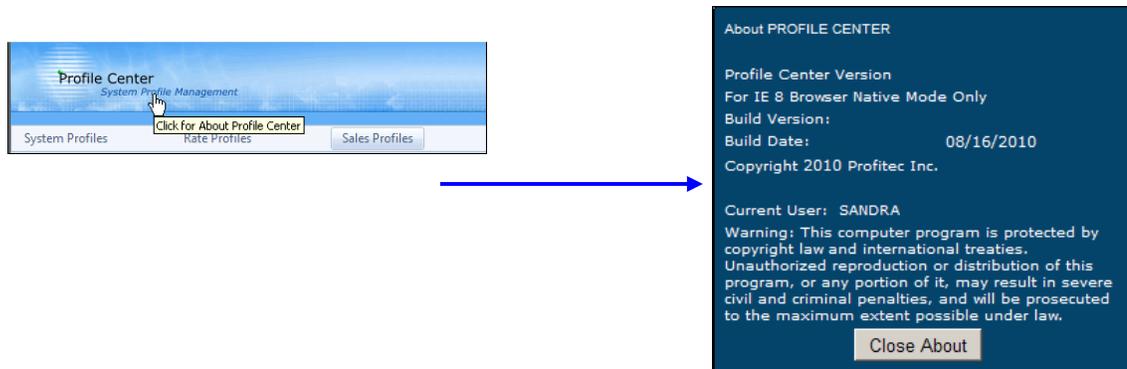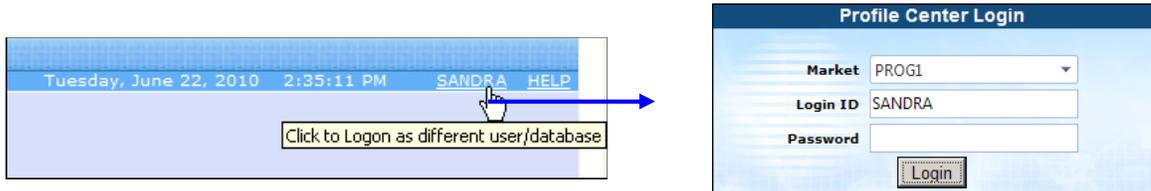
Common Profile Center Features

Many areas of the Profile Center include tooltips or short descriptions specific to the Profile Center as you mouse over items.
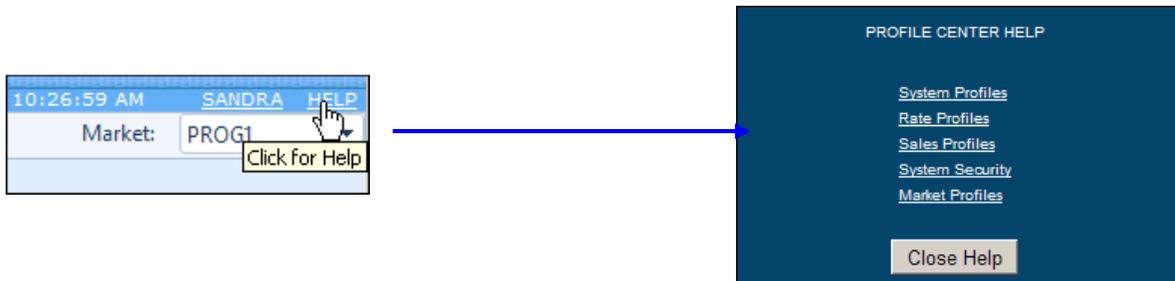

1. **MOUSING** over **/ CLICKING** the words **PROFILE CENTER** in the Profile Center banner displays information about the Profile Center. Build Version as well as Build Date display.
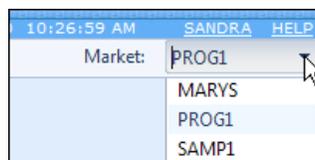

2. **MOUSING** over **/ CLICKING** your **LOGIN NAME** is use to logon as a different user or change databases as shown below.

3. **MOUSING** over **/ CLICKING HELP** displays the Profile Center Help menu. Each module in the Profile center includes a help document as seen below.

4. The down arrow next to the current Market is used to switch to another market within your database.

Sales Profiles

The **SALES PROFILE** module is used to create Sales Channel profiles, create commission plans, and view and report on commission activity.

The following terms are used throughout the **SALES PROFILE** module.

- **SALES CHANNELS**

  Sales Channels identify individuals or groups who earn commissions.

  Two types of **SALES CHANNELS** are available within OmniBill:

  1. **SINGLE CHANNEL**

     A Single Channel represents a single agent who receives all of the earned commission.

  2. **STRUCTURE**

     A structure is two or more Single Channels sharing the earned commission.

- **HOUSE CHANNEL**

  House Channel is the default **SALES CHANNEL** that comes with the database. **SALES CHANNEL** is a required field at the account and service levels. Using **HOUSE CHANNEL** satisfies this system requirement.

- **DEFAULTCOMM**

  Defaultcomm is the default Commission Plan that comes with the database. **COMMISSION PLAN** is a required field at the service levels. Using **DEFAULTCOMM** satisfies this system requirement.

A decision must be made and coordinated with your Billing Analyst as to how OmniBill will calculate commissions for Sales Channels. Two options exist: "**AS PAID**" or "**AS BILLED**."

- If the selection is "**AS PAID**," commissions are released to the Sales Channel's profile in OmniBill® when the **CUSTOMER PAYS** their invoice in full.

- If the selection is "**AS BILLED**," commissions are calculated and released to the Sales Channel's profile when the **INVOICE IS CREATED** during the bill production process.

The **SALES CHANNEL TYPE** code can be used to identify broad types of agents within your system and is purely informational. The system ships with two default **CHANNEL TYPE CODES** as shown below:

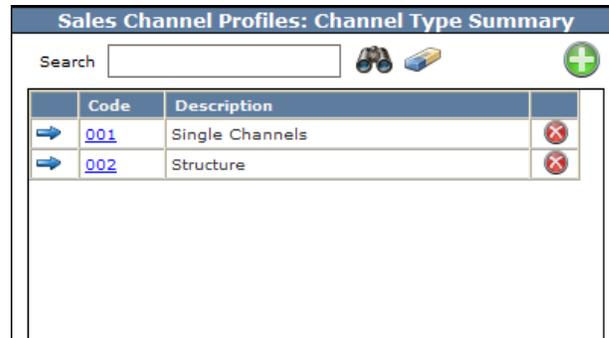**Default Sales Channel Types** ➡

To view and/or edit a **SALES CHANNEL TYPE** code, click the code in the **CHANNEL TYPE SUMMARY** screen. The **CHANNEL TYPE DETAIL** screen displays. The **DESCRIPTION** field is the only field that can be edited. The **CODE** cannot be changed.

Creating a Sales Channel Type Code

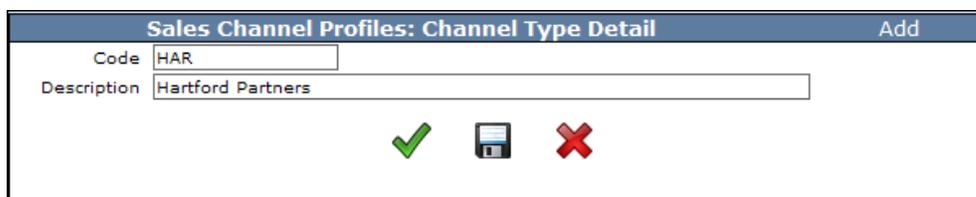| Action	Description
1. Click **SALES CHANNEL TYPE** from the Sales Profiles drop down list.	The **CHANNEL TYPE SUMMARY** screen displays.

Action	Description
2. Click the **GREEN PLUS** button.	The **CHANNEL TYPE DETAIL** screen displays.

Action	Description
3. Enter a **CODE** and a **DESCRIPTION**.	The **CODE** is an alphanumeric field that can be a maximum of three characters. Once saved the code cannot be changed.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters. |
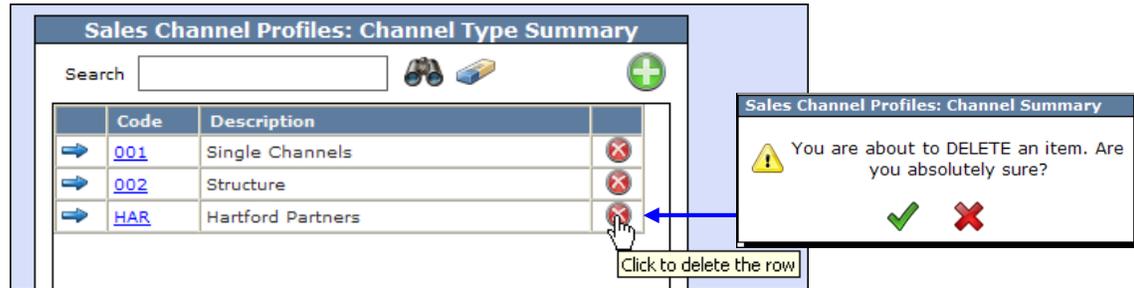

4. Click the **DISC** to save and remain on the **CHANNEL TYPE DETAIL** screen; or click the **CHECKMARK** to save the new code and exit the screen; Click **X** to cancel the action.
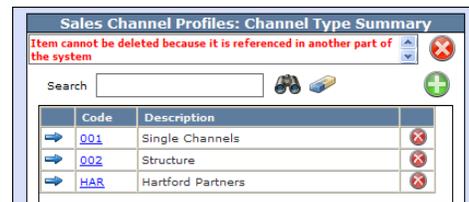
The code is added to the **CHANNEL TYPE SUMMARY** screen.

DELETING A CHANNEL TYPE SUMMARY CODE

To delete a **CHANNEL TYPE CODE**, click the **X** next to the code you want deleted. The following message displays. Click the Checkmark to delete the code or the X to cancel the action.

If the code is applied to a Sales Channel, the following message displays indicating the code cannot be deleted.

Sales Transaction Type

CHANNEL TRANSACTION TYPE codes are used to apply credits or debits to Sales Channel profiles. Two default **CHANNEL TRANSACTION TYPE** codes ship with the system:

- **COMPY** – The **COMMISSION PAYMENT** code is a debit transaction used by the system to post earned commission amounts to Sales Channel profiles. This code can also be used to manually post commissions to Sales Channel profiles.

- **COMRV** – The **COMMISSION REVERSAL** code is a credit transaction used by the system to reverse earned commission amounts as a result of a credit. This code can also be used to manually reverse commissions to Sales Channel profiles.
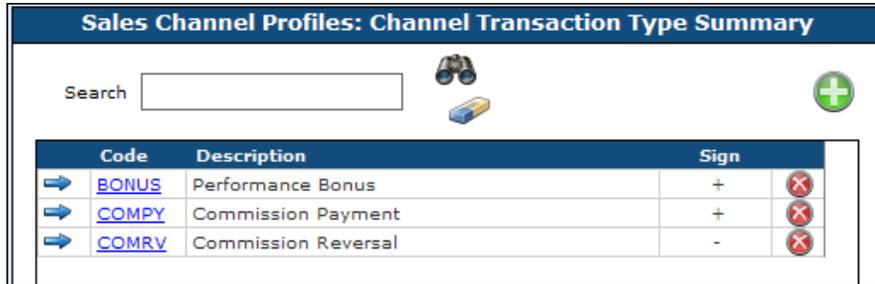
Default Channel Transaction Type Codes ➡

Additional codes can be added to your database. The **BONUS** code is an example of an added code.

Creating a Channel Transaction Type Code

Action	Description
1. Click **SALES TRANSACTION TYPE** from **SALES PROFILES** drop down list.	The **CHANNEL TRANSACTION TYPE SUMMARY** screen display

Action	Description
2. Click the **GREEN PLUS** button.	The **CHANNEL TRANSACTION TYPE DETAIL** screen displays.

ASSIGN START

The **ASSIGN START** date is the first date the **CHANNEL TRANSACTION TYPE** code is available for assignment. The current date defaults in the **ASSIGN START** field, but it can be changed.

ASSIGN END

The **ASSIGN END** date is the date the **CHANNEL TRANSACTION TYPE** code is no longer available for assignment. The **ASSIGN END** date does not affect any profile currently using this code.

Action	Description
3. Enter a **CODE** and a **DESCRIPTION**.	The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.
	The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.
4. Select a **SIGN**.	The choices are + (Debit) or – (Credit). The choice selected defines the type of code created.

Action	Description

- **- (CREDIT)** reduces commission amounts on a Sales Channel Profile.

- **+ (DEBIT)** increases commission amounts on a Sales Channel Profile.

5. Click the **DISC** to save the code and remain in the **CHANNEL TRANSACTION TYPE DETAIL** screen; or click the **CHECKMARK** to save the code and exit the screen. Click **X** to cancel the action.

DELETING A CHANNEL TRANSACTION TYPE CODE

1. From the Channel Transaction Type Summary screen, click the **X** to delete a code. The following message appears.

2. Click the Green Checkmark to delete; X to cancel.

NOTE: The following message displays if the code is used in your database; the code cannot be deleted.

Sales Channels

The **SALES CHANNELS** module is used to create and manage Single Channel and Sales Structures Profiles.

- A **SINGLE CHANNEL** represents a single agent who receives all of the earned commission.

- A **STRUCTURE** is two or more Single Channels sharing the calculated earned commission.

HOUSE CHANNEL is the default **SALES CHANNEL** that ships with the database. A **SALES CHANNEL** code is required at the account and service levels. The **HOUSE** code satisfies this system requirement and can be used if individual **SALES CHANNELS** are not created in the database.

	Code	Description	City	State	Start Date	End Date	Type	Structure	
⇒	ABC	ABC Sales Agency	Hartford	CT	10/04/2001		001	N	⊗
⇒	BILLBBUX	Bill Bigbux	Wallingford	CT	02/11/2003		001	N	⊗
⇒	COMMJNCT	Commission Junction	Wallingford	CO	11/19/2002		001	N	⊗
⇒	HOUSE	House Channel	City		12/01/1997		001	N	⊗

Sales Channel Profiles: Channel Information Summary

Creating a Single Channel

Action	Description
1. Select **SALES CHANNELS** from the Sales Profile drop down list.	The **CHANNEL INFORMATION SUMMARY** screen displays with the default code.

| 2 Click the **GREEN ADD** button. | The **CHANNEL INFORMATION DETAIL** screen appears. |

The **CHANNEL ORIENTATION** defaults to **SINGLE CHANNEL**. The Channel Orientation identifies what type of Channel ID is being created – **SINGLE CHANNEL** or a **STRUCTURE**. The tabs that display are based on your Channel Orientation – Single or Structure.

SINGLE CHANNEL

Selecting **SINGLE CHANNEL** orientation displays four tabs as seen above.

| 3. Enter the **CHANNEL ID**. | The **CHANNEL ID** is an, alphanumeric code that identifies the **SALES CHANNEL** in your database. This code can be a maximum of eight characters. Once the Channel ID is saved, it cannot be changed. |

Action	Description
4. Enter the **CHANNEL NAME**.	The **CHANNEL NAME** field is a maximum of 30 characters and identifies the Sales Channel.
5. Select the **CHANNEL TYPE** from the drop down list box.	Two default **CHANNEL TYPE** codes ship with the database. This field is informational only. Additional Channel Types can be created.

CHANNEL LOGO

The **LOGO** of an agent can appear on the customer's invoice along with the primary company logo. Logos are available for selection if coordinated with your assigned Billing Analyst. Once coordinated, the logo appears in the **CHANNEL LOGO FIELD**. This field works in conjunction with the Logo Description Maintenance Utility. Refer to the System Utilities document for additional information.

ASSIGN DATE

The **ASSIGN DATE** is the first date the **CHANNEL ID** is available for assignment. The current date defaults in the **ASSIGN DATE** field, but it can be changed.

TERMINATION DATE

The **TERMINATION DATE** is the date the **CHANNEL ID** is no longer available for assignment. The termination date does not affect any accounts currently assigned this code.

CYCLE TOLERATION

The **CYCLE TOLERATION** field is currently not functioning. This field defaults to 99.

SINGLE CHANNEL TAB

NOTE: If **STRUCTURE** is selected as the **CHANNEL ORIENTATION**, The Transactions and Messages tabs are not displayed. Transactions are always added to the individual Channel profiles.

Action	**Description**

6. Complete required fields in the **SINGLE CHANNEL** tab.

- Enter details for Address 1, City, State, and Zip Code.
- Complete either the **SOCIAL SECURITY #** or the **FEDERAL ID #.** At least one of these fields **MUST** be filled in to save the Channel Profile.

The following fields are optional in the Single Channel tab:

- **CONTACT** – Identifies the Contact information for the Sales Agent. For example, this field could be used to represent an assistant, office manager, or the agent themselves.

- **TITLE** – Used to identify a title of the contact, if applicable.

The **E-MAIL** and **CHANNEL FILE PATH** fields are informational and can be used to supply reports to individual sales channels. Selected reports in OmniBill have an option to output report results to a **CHANNEL**. Refer to Section 20 – Reports in the User Manual for more information on which reports have this option.

In order for a Sales Channel to receive reports, an **E-MAIL ADDRESS** and/or a **CHANNEL FILE PATH** must be entered and the **REPORT OUTPUT ENABLE** boxes must also be checked on the **SINGLE CHANNEL** tab. If the **REPORT OUTPUT ENABLE** box(s) are not checked, then **E-MAIL** and/or **CHANNEL FILE PATH** options are purely informational.

UNPAID COMM. and **YTD EARNED COMM.** are both system-generated fields.
Commission transactions are posted in the **TRANSACTIONS** tab. If the transaction Paid column displays an **N**, the commission is **UNPAID**. If the **P**aid column displays a **Y**, the commission is **PAID**.

The **Y**ear **T**o **D**ate **EARNED** commission field displays the total dollar amount for all commission transactions posted to the Sales Channel profile for the calendar year.

7. Click the **DISC** to save the channel information and remain in the **CHANNEL INFORMATION DISPLAY** screen; or click the **CHECKMARK** to save the channel information and exit the screen.

Transactions Tab

The **TRANSACTIONS** tab is used to display commission transactions for a Single Channel. Commission Transactions can be manually entered or system generated.

SYSTEM GENERATED COMMISSION TRANSACTIONS

OmniBill calculates earned commissions for each Sales Channel during the bill production process. The commission transactions are posted to the Sales Channel profile based on the database commission setting: **AS PAID** or **AS BILLED.**

- If the database setting is **AS PAID**, commissions are posted to the **TRANSACTIONS** tab when a **CUSTOMER PAYS** their invoice in full.

- If the database setting is **AS BILLED**, commissions are posted immediately on the **TRANSACTIONS** tab when the bill run files are imported to **PERM**.

The **TRANSACTIONS** tab is initially empty.

- Click **SELECT DATES** to display transactions that fall within the Dates selected. The date range defaults to the latest four months worth of transactions.

- If there have been no recent commission transactions for the selected sales channel, the **TRANSACTIONS** tab remains blank.

To view commission transactions older than four months, change either the **TRANS FROM DATE** and/or the **TRANS END DATE** fields.
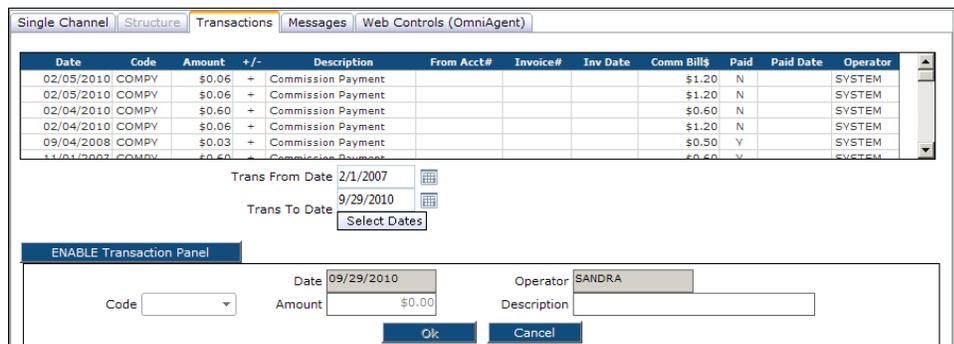
SELECTING A TRANSACTION DATE RANGE

The **TRANS FROM DATE** and **TRANS END DATE** fields are used to select a date range of **COMMISSION TRANSACTIONS** to view. The system automatically displays one hundred and twenty days of transaction activity.

Action	**Description**
1. Click the **CALENDAR** icon next to the **TRANS FROM DATE**.	
2. Select a **DATE**.	The selected date appears in the **TRANS FROM DATE** field.
3. Click the calendar icon next to the **TRANS END DATE**; select a **DATE**.	The selected date appears in the **TRANS END DATE** field**.**
4. Click **SELECT DATE** to update the transaction grid.	

DATE – The Date column displays the date the commission transaction was posted by the system or manually. If the database is set-up **AS PAID**, the **DATE** represents the date the account balance was paid in full. If the database is set-up **AS BILLED**, the **DATE** represents the date the bill production files were imported.

CODE – The Code column displays the Sales Transaction Type Code, used to identify what type of Commission Transaction was posted.

AMOUNT (+/-) – The amount column displays the earned commission amount. The plus and minus signs indicate if the channel received a commission payment (**+**) or a commission reversal (**-**).

DESCRIPTION – The description column displays the description of the Sales Transaction Type Code.

FROM ACCT# - This column identifies which account the agent received their commission from. This field is blank if the commission transaction was posted manually.

INVOICE# - This column identifies which invoice the commission amount was calculated in. This field is blank if the commission transaction was posted manually.

INV DATE – This column identifies the bill run date the invoice was generated for. This field is blank if the commission transaction was posted manually.

COMM BILL $ - The commission bill amount column represents the eligible commission amount that was used to calculate the earned commission. This field is blank if the commission transaction was posted manually.

PAID – The Paid column displays either an <u>N</u> (not released, meaning the Sales Channel has not been paid by the company) or <u>Y</u> (released, the Sales Channel has been paid by the company). The PD indicator is a system-generated field. All commission transactions posted by the system or posted manually are an **N**. The **N** in the **PD** column can only be changed to a **Y** if the **REPORT AND POST ALL UNPAID COMMISSION TRANSACTIONS** report is run. See page __ for more information.

PAID DATE – The Paid Date column displays the date the **REPORT AND POST ALL UNPAID COMMISSION TRANSACTIONS** report was run. This indicates the Sales Agent was paid their earned commission. The Paid Date column is blank for commission transactions that have not been paid to the sales channel.

OPERATOR – **SYSTEM** displays in the operator column for system-generated commission transactions. If the transaction was posted manually, the **USER ID** of the user who posted the transaction displays in the Operator column.

MANUALLY ENTERING COMMISSION TRANSACTIONS

Action	Description

1. Click the **TRANSACTIONS** tab.

2. Click **ENABLE TRANSACTION TABLE**.　　The **add** fields become available.

3. Select the appropriate Transaction **CODE** from the drop down list. The Description field fills in with the default description from the Transaction Type Code once the code is selected. The Description can be changed if needed.

4. Enter the commission amount in the **AMOUNT** field.

5. Click **OK** to save the transaction to the grid.

When transactions are posted, initially they appear in the grid with an **N** in the **Paid** column indicating the Sales Channel has not physically received their commission payment from your company.

A **Y** appears in the **Paid** column when the **REPORT AND POST ALL UNPAID COMMISSION TRANSACTIONS** option is run.

Messages Tab

The **MESSAGES** tab is used to create messages for Sales Channels. The message prints on the **NEWS AND INFORMATION PAGE** on the customer invoice. The messages can be four lines each with 70 characters per line. There is no spell check or word wrap available on the Messages tab.

- **PRIMARY MESSAGE** appears on invoices of customers the Sales Channel is the Master Channel.

- **SECONDARY MESSAGE** appears on invoices of customers when a structure is applied to the account, and the Single Channel is a member of the structure.

Web Controls Tab (OmniAgent)

The **WEB CONTROLS** tab is used for OmniAgent only. The information in this tab is discussed in the **OMNIAGENT ADMINISTRATORS** Guide.

Creating a Structure

A **STRUCTURE** is two or more Single Channels sharing earned commissions. Before a **STRUCTURE** can be created, Single Sales Channels must exist in the database.

Action	Description
1. Select **SALES CHANNELS** from the Sales Profile drop down list.	The **CHANNEL INFORMATION SUMMARY** screen displays with the default code.

| 2 Click the **GREEN ADD** button. | The **CHANNEL INFORMATION DETAIL** screen appears. |

The **CHANNEL ORIENTATION** defaults to **SINGLE CHANNEL**. The Channel Orientation identifies what type of Channel ID is being created – **SINGLE CHANNEL** or a **STRUCTURE**.

| 3. Enter the **STRUCTURE CHANNEL ID** and **CHANNEL NAME** | The **CHANNEL ID** is an eight character, alphanumeric code that identifies the **STRUCTURE** in your database. Once the Channel ID code is saved, it cannot be changed. |
| | The **CHANNEL NAME** field is a maximum of 30 characters and identifies the Sales Structure. |

Action	**Description**

4. Select **STRUCTURE** for the **CHANNEL ORIENTATION**.

The Channel Information Detail screen changes to display only two available tabs: **STRUCTURE** and **WEB CONTROLS**.

Action	**Description**
5. Select a **CHANNEL TYPE** from the drop down list box.	The **CHANNEL TYPE** Code **002** – Structure comes with the system.

Other Channel Types are available if created using the Sales Channel Type option discussed earlier in this document and be selected.

Structure Tab

Sales channels selected in the structure share the earned commission calculated for any account where the **STRUCTURE CHANNEL ID** is selected as the agent of record.

Action	**Description**
1. Select the **PRIMARY CHANNEL ID** from the drop down list.	
2. Enter the **COMMISSION PERCENTAGE** for the Primary Channel.	The **TOTAL REMAINING** percentage reflects the remaining amount that can be distributed among secondary channels selected. The system will not allow more or less than 100% to be distributed.

Action	**Description**

3. Select a **SINGLE CHANNEL** from Channel ID drop down list.

4. Enter the **COMMISSION PERCENTAGE** for the selected agent in the **DISTRIBUTION** field.

5. Click the **ADD SECONDARY ID** button to commit the **SALES CHANNEL** to the grid. Continue selecting Sales Channels until the **TOTAL REMAINING** percentage is zero.

The total remaining percentage must equal zero before you can save the Sales Structure. The system will not allow more or less than 100% to be assigned to the structure. If you attempt to save the structure and the Total Distributions don't equal 100%, a message displays:

NOTE: The **TRANSACTIONS** tab is not visible in the Structure Channel Information Display screen because commission transactions for members of a **STRUCTURE** display on their **SINGLE SALES CHANNEL** profile.

MESSAGES TAB

Once the Structure is saved, the Message tab displays. The message prints on the **NEWS AND INFORMATION PAGE** on the customer invoice. The messages can be four lines each with 70 characters per line. There is no spell check or word wrap available on the Messages tab.

Messages entered here print on the invoices of accounts where the Structure is the Master Channel.

Action	Description

6. Click the DISC to save the Structure information and remain in the **CHANNEL INFORMATION DISPLAY** screen; or click the **CHECKMARK** to save the Structure information and exit the screen.

The **CHANNEL INFORMATION SUMMARY** screen displays a **Y** in the **STRUCTURE** column to indicate which Channel ID's are structures.

Changing an Existing Structure

An existing **STRUCTURE** can be edited any time before production by changing existing members, adding new members, and changing percentage amounts. Prior earned commission transactions are not effected by these changes.

Action	Description
1. Select **SALES CHANNEL** from the Sales Profiles drop down list.	The **CHANNEL INFORMATION SUMMARY** screen displays.

| 2. Click a **STRUCTURE CHANNEL** from the **CHANNEL INFORMATION SUMMARY** screen. | The **CHANNEL INFORMATION DISPLAY** screen appears. |

- • Replacing an existing **PRIMARY CHANNEL**:
    1. Select the new **PRIMARY CHANNEL** from the **PRIMARY CHANNEL ID** drop down list.
    2. Enter the **PRIMARY DISTRIBUTION PERCENTAGE** amount.

    In order for your changes to take effect, remember to click **OK** or **APPLY**.

- • Adding a **NEW SECONDARY CHANNEL**:
    1. Select the Single Channel from the drop down list.
    2. Enter the **DISTRIBUTION PERCENTAGE.**
    3. Click **ADD SECONDARY ID**.

- • Deleting a **SECONDARY CHANNEL**:
    1. Highlight the **SECONDARY CHANNEL** in the grid you want to delete.
    2. Press the **DELETE KEY** on your keyboard.

CHANGING EXISTING PERCENTAGES

- • Changing the Primary Distribution Percentage:
    1. Enter the new Primary Distribution Percentage in the **PRIMARY DIST. %** field.

- • Changing the Secondary Channel Distribution Percentage:
    1. Click the **SECONDARY CHANNEL**, change the distribution percentage, and then click **UPDATE SECONDARY ID.**

Commission Plans

Commission plans are created to calculate commission on **TRAFFIC** and **NON-TRAFFIC** revenue. The revenue codes are known as **RATE TYPE CODES** and are found in the **COMMISSION AREAS** grid when creating a commission plan.

The Plan Orientation indicator determines the type of commission plan being created.

1. **SINGLE RATE TYPE RELATIONSHIP**: This type of commission plan allows you to define unique commission structures for each **RATE TYPE CODE** within a single commission plan. This reduces the number of commission plans needed.

2. **COMBINED RATE TYPE TABLE**: This type of commission plan allows you to group multiple **RATE TYPE CODES** and define one commission structure for the group.

Based on the **COMMISSION AREA** selected, up to four options are available to calculate commissions:

1. **PERCENTAGE** (% value applied directly against billed amount): The commission billed amount is multiplied by the defined percentage to determine commission amounts paid to a Sales Channel.

2. **CPM** (value represents PER MINUTE payout): The amount entered is used to determine the per minute cost that should be paid to a Sales Channel. The duration is multiplied by the duration of usage generated by an account. This selection is only available for **TRAFFIC** based items.

3. **DELTA** (Payout equals Delta amount between entered value and billed amount): The commission calculated is the difference between the billed amount and the amount entered on the plan.

4. **FLAT** (flat entered value paid for each type appearance): The **FLAT** pay out type should be used with caution. The amount paid to a sales channel can exceed the amount an item is sold for.

Creating a Single Rate Type Relationship Commission Plan

This type of commission plan allows you to define unique commission structures for each **RATE TYPE CODE** within a single commission plan. This reduces the number of commission plans needed.

Action	Description
1. Select **COMMISSION PLANS** from the Sales Profile drop down list.	The **COMMISSION PLAN SUMMARY** screen displays with **DEFAULTCOMM**, the default Commission Plan.

Action	Description
2. Click the **GREEN ADD** button.	**THE COMMISSION PLAN DETAIL** screen displays.

Action	Description
3. Enter a **PLAN CODE**.	The **CODE** is an alphanumeric field that can be a maximum of 12 characters. Once saved the code cannot be changed.
4. Enter a **PLAN NAME**.	The **PLAN NAME** is an explanation of the code that can be a maximum of 30 characters.

ASSIGN START DATE

The **ASSIGN START DATE** is the first date the **COMMISSION PLAN** is available for assignment. The current date defaults in the **ASSIGN START DATE** field, but it can be changed.

Action	**Description**

ASSIGN END DATE
The **ASSIGN END DATE** is the date the **COMMISSION PLAN** is no longer available for assignment. The **ASSIGN END DATE** does not affect any profile currently using this code.

5. Select a **PLAN ORIENTATION** – Single Rate Type	
6. Select from the **ALLOWED SCATS** list each service category the commission plan can be assigned to when adding a line or service.	The Service Categories displayed are based on the selected Service Categories in System Profiles.
7. Select a **RATE TYPE CODE** from the **COMMISSION AREAS** grid.	The **RATE TYPE CODE** selected determines the available commission structures

Selecting a **TRAFFIC** rate type code displays the following commission structures.	Selecting a Non-Traffic rate type code displays the following commission structures.

When **SINGLE RATE TYPE RELATIONSHIP PLAN ORIENTATION** is selected, only one Rate Type Code can be selected from the **COMMISSION AREAS** grid at a time.

- Each Rate Type Code selected from the Commission Areas grid can have a different commission rate

When **COMBINED RATE TYPE TABLE** is selected, multiple commission areas can be selected by holding down the CTRL key on your keyboard and selecting multiple Rate Type Codes.

- All Rate Type Codes highlighted must have the same commission rate assigned.

8. Select a **TYPE** – Percentage, CPM, Delta or Flat.	Percentage is selected as the system default.
9. Enter commission payment amounts to calculate earned commission in the grid provided.	

Action	Description

- First Field is the **TO DOLLAR** field and is used to indicate the threshold dollar amount an account must reach in order for the agent to receive the defined commission. Entering $100 as the first entry indicates the defined commission amount will be calculated on all charges from $0.01 to $100.00.

- Entering 999999, indicates the threshold is unlimited.

- **INITIAL** and **ONGOING** fields work in conjunction with the number you enter in the **ONGOING CALCULATION BEGINS AT CUSTOMER BILLED CYCLE** field.

- Entering a number in the **ONGOING CALCULATION BEGINS AT CUSTOMER BILLED CYCLE** activates the **ONGOING** values. Leave this field blank and the **ONGOING** fields are not used.

- Periods 1 through 4 correspond to your Time of Day tables (Period 4 does not function). If you use a 24 hour Time of Day table, you need only be concerned with Period 1.

10. Click the **ADD STEP** to commit the commission plan to the grid.

11. Click the **GREEN CHECKMARK** to save the commission plan.

Various Commission examples are shown below.

SINGLE RATE TYPE - TRAFFIC RATE TYPE CODE SELECTED

Action	Description
1. Select one **TRAFFIC RATE TYPE CODE**.	All four **TYPE** options are available when a **TRAFFIC RATE TYPE** is selected.

Action	Description
2. Enter an amount in the **TO DOLLAR** field.	The **TO DOLLAR** field defines the spending level the customer must achieve before the commission amount will be applied. Entering **99999999** in this field indicates that the system will apply the commission amount to an unlimited dollar amount.
3. Enter commission payment amounts in Periods 1, 2 and 3. Periods 1, 2, and 3 correspond to the Time of Day tables defined in your database. Period 4 does not function. If you are using 1 time of day period (24 Hour time of day), then Period 1 is the only field that needs to be defined.	When **PERCENTAGE** is selected as the **TYPE**, the commission amounts are entered as a percentage. If **CPM**, **DELTA**, or **FLAT** is selected as the **TYPE**, then a dollar amount is entered.
4. Click the **ADD STEP** button.	The rates display in the Commission Grid.

Action	Description

- Click the **RED X** icon t delete a row.
- Click the **NOTEPAD AN PENCIL** icon to edit a row

The above commission structure calculates earned commission based on the following spending levels of the Channel's customer. If the customer spends:

- $100.00 or less, commissions are calculated at 1%.

- Between $100.01 and $500.00, commissions are calculated at 3%.

- Over $500.00, commissions are calculated at 5%.

You can now select another **RATE TYPE CODE** from the commission area, complete the commission structure, and apply it to this commission plan.

SINGLE RATE TYPE – NON-TRAFFIC RATE TYPE CODE SELECTED

Action	Description
1. Select a **NON- TRAFFIC RATE TYPE CODE**.	The **TYPE CPM** is disabled when a **NON-TRAFFIC RATE TYPE CODE** is selected.

Rate Type Code Identified

CPM is disabled when a Non-Traffic Rate Type Code is selected.

2. Select a Type Option.

3. Enter commission payment amount.	When **PERCENTAGE** is selected as the **TYPE**, the commission amounts are entered as a percentage. If **DELTA** or **FLAT** is selected as the **TYPE**, then a dollar amount is entered.

4. Click the **CHECKMARK** or the **DISC** to save the **COMMISSION PLAN**

ONGOING COMMISSION RATES

The commission payout grid includes two options: **INITIAL COMMISSION RATES** and **COMMISSION RATES**. Ongoing commission rates allows you to stagger the commission rates paid to a Sales Channel overtime, based on the number of billing cycles generated by an account.

- o The **BILLED CYCLE** value field is used during production to calculate when the switch from **INITIAL COMMISSION RATES** to **ONGOING COMMISSION RATES** should occur. Production counts the number of Account Summary records generated for an account to determine if the account has reached the billed cycle value. The switch to the **ONGOING COMMISSION RATES** occurs when the account reaches the value entered in the **BILLED CYCLE** field. The first billing cycle includes any charges for the first month plus the month in advance.

- o **FOR EXAMPLE**, if 12 is entered in the **BILLED CYCLE** field, production switches to the ongoing commission rates during the 12th cycle. This field can be left blank if commissions are not based on ongoing rates.

TRAFFIC RELATED RATED TYPE

	Traffic Related Detail - Initial				Traffic Related Detail - Ongoing					
To Dollar	Period 1	Period 2	Period 3	Period 4	Period 1	Period 2	Period 3	Period 4		
100	1.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	✗	📝
500	3.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	✗	📝
99999999	6.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	✗	📝

	Traffic Related Detail - Initial				Traffic Related Detail - Ongoing			
To Dollar	Period 1	Period 2	Period 3	Period 4	Period 1	Period 2	Period 3	Period 4
$0	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %

Add Step   **MAKE sure you have selected desired TYPE of Commission PRIOR to add. CANNOT CHANGE TYPE AFTER ADD.**

Ongoing Calculation Begins at Customer Billed Cycle 12

NON-TRAFFIC RELATED RATED TYPE

Acct Recurring - Partial - Reinst.

Type

⦿ Percentage (% value applied directly against billed amount)

○ CPM (value represents PER MINUTE payout)

○ Delta (Payout equals Delta amount between entered value and billed amount)

○ Flat (flat entered value paid for each type appearance)

Non-Traffic Related Detail-Initial	Non-Traffic Related Detail-Ongoing
10	15

Ongoing Calculation Begins at Customer Billed Cycle 12

✔ 💾 ✗

NOTES:

- Zero can be used for the **INITIAL COMMISSION RATE(S),** indicating a delayed start in the calculation of earned commission. Zero can also be used for the **ONGOING COMMISSION RATE(S),** indicating commission rates will no longer be calculated after the defined number of billing cycles has past.

- Commissions are not calculated for any **SURCHARGES** outlined below. If any of these nine commission areas are highlighted in a commission plan, a commission amount will not be calculated based on the surcharge amount.

Commission Areas	Commission Areas	Commission Areas
OPA (0+/0-) Surcharge	Home OPA (0+/0-) Surcharge	Roam OPA (0+/0-) Surcharge
OPA Busy Verification	Home OPA Busy Verification	Roam OPA Busy Verification
OPA Busy Interrupt	Home OPA Busy Interrupt	Roam OPA Busy Interrupt

- Commissions are not calculated for any of the surcharges found in the **CHARGES** tab in rate tables, except for Directory Assistances. Calculations can be calculated for Directory Assistance by highlighting the appropriate commission area in the Commission Plan.

Commission Areas

Local Directory Assistance
Local Directory Assistance Name/Address
Local Directory Assistance Call Completion
Long Distance Directory Assistance
Long Distance Directory Assistance Name/Add
Long Distance Directory Assistance Call Comp

- When selecting **GROUP FEE** (GroupFe) and/or **PLAN MISCELLANEOUS** fee (MiscFee Rate Type to receive commissions, the **MASTER RATE PLAN** must have the commission plan selected as the default commission plan or DEFAULTCOMM will be the commission plan that OmniBill uses to calculate commission.
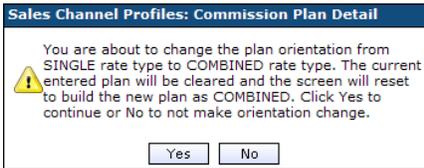
Creating a Combined Rate Type Commission Plan

A **COMBINED RATE TYPE TABLE** allows you to **GROUP** multiple **RATE TYPE CODES** from the **COMMISSION AREAS** and define a single commission structure for the group.
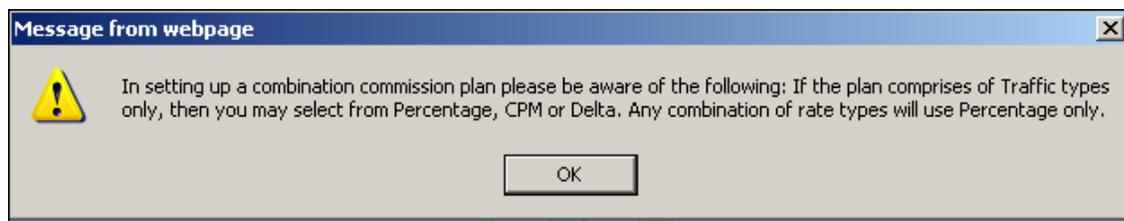
Action	Description
1. Select **COMMISSION PLANS** from the Sales Profile drop down list.	The **COMMISSION PLAN SUMMARY** screen displays with **DEFAULTCOMM**, the default Commission Plan.

2. Click the **GREEN ADD** button.	The **COMMISSION PLAN DETAIL** screen displays.
3. Enter a **PLAN CODE**.	The **CODE** is an alphanumeric field that can be a maximum of 12 characters. Once saved the code cannot be changed.
4. Enter a **PLAN NAME**.	The **PLAN NAME** is an explanation of the code that can be a maximum of 30 characters.
5. Select **COMBINED RATE TYPE TABLE.**	The following message displays:
6. Click **YES** to continue. If you switch **TYPES** (single to combined or combined to single) all selections are removed and you will need to start your commission plan from scratch.	

Action	**Description**

NOTE:
Non-Traffic Rate types selected will be paid out based on Period 1 entry.

ASSIGN START DATE

The **ASSIGN START DATE** is the first date the **COMMISSION PLAN** is available for assignment. The current date defaults in the **ASSIGN START DATE** field, but it can be changed.

ASSIGN END DATE

The **ASSIGN END DATE** is the date the **COMMISSION PLAN** is no longer available for assignment. The **ASSIGN END DATE** does not affect any profile currently using this code.

7. Select from the **ALLOWED SCATS** list each service category the commission plan can be assigned to when adding a line or service.

The Service Categories displayed are based on the database defaults.

8. Select **RATE TYPE CODES** from the **COMMISSION AREAS** grid. More than one **RATE TYPE CODE** can be selected from the **COMMISSION AREAS** grid at a time.

Action	**Description**

9.   Select a **ALLOWED SERVICE CATEGORIES**

Example: In the below commission plan the selected Allowed Scats(s) are **OD** (Outbound Dedicated Access) and **IE** (Inbound Equal Access). This commission plan will only be available when creating **OD** and **IE** lines.

9.   Select the Commission areas.

10.   Enter commission payment amounts to calculate earned commission in the grid provided.

The following examples show **COMBINED RATE TYPE COMMISSION PLANS** and how the display screen changes based on the **RATE TYPE CODE** selected.

NOTE: Once a commission plan is saved, you cannot change the Plan Orientation or the Type.

COMBINED RATE TYPE WITH TRAFFIC RATE TYPE CODES SELECTED ONLY

Action	Description
1. Select **TRAFFIC RATE TYPE CODES**.	All four **TYPE** options are available when all **TRAFFIC RATE TYPES** are selected.
2. Select the **COMMISSION AREAS** (Rate Types) to include.	To highlight more than 1 commission type, press your CTRL key while you click the needed rate type.
3. Select the **TYPE** Option.	

All four options are available only when all Traffic Rate Type Codes are selected.

Once you have selected a type, you will not be able to change your selection.

4. Enter an amount in the **TO DOLLAR** field.	The **TO DOLLAR** field defines the spending level the customer must achieve before the commission amount will be applied. Entering **99999999** in this field indicates that the system will apply the commission amount to an unlimited dollar amount.

Action	**Description**
5. Enter commission payment amounts in Periods 1, 2 and 3.	When **PERCENTAGE** is selected as the **TYPE**, the commission amounts are entered as a percentage. If **CPM**, **DELTA**, or **FLAT** is selected as the **TYPE**, then a dollar amount is entered.
	Periods 1, 2, and 3 correspond to the Time of Day tables defined in your database. Period 4 does not function.
6. Click the **ADD STEP** button.	The rates display in the Commission Grid.

After completing the commission structure, the information must be saved:

6. Click **DISC** to apply and remain on the **COMMISSION PLAN DISPLAY** screen;

   or

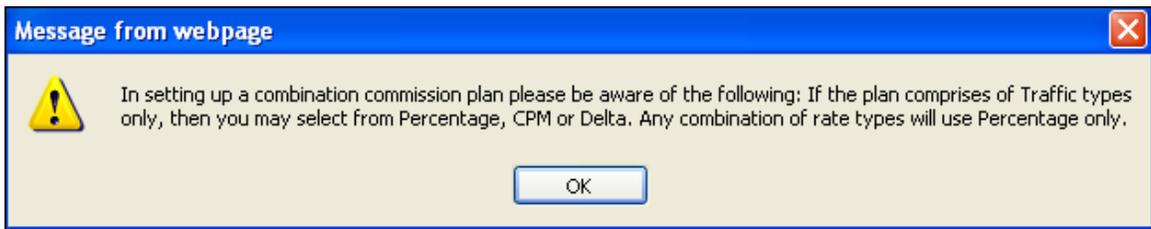   Click **CHECKMARK** to save and exit the screen.

Action	**Description**

If you attempt to change the **PLAN ORIENTATION** to single before the plan is saved, the following message displays.

Additional information displays.

COMBINATION OF TRAFFIC AND NON-TRAFFIC RATE TYPE CODES SELECTED

Action	Description
1. Select **TRAFFIC** and **NON- TRAFFIC RATE TYPE CODES.**	Percentage is the only option available when selecting a combination of **TRAFFIC** and **NON-TRAFFIC RATE TYPE CODES.**

Action	Description
2. Enter an amount in the **TO DOLLAR** field.	The **TO DOLLAR** field defines the spending level the customer must achieve before the commission amount will be applied. Entering **99999999** in this field indicates that the system will apply the commission amount to an unlimited dollar amount.

3. Enter the percentage for the commission payment amount in **PERIOD 1** field only.

Note: If both **TRAFFIC** and **NON-Traffic RATE TYPE CODES** are selected, commission is calculated on the percentage entered in the *PERIOD 1 FIELD* only and a **NOTE** displays on the screen. If **ONLY TRAFFIC RATE TYPE CODES** or **ONLY NON-TRAFFIC RATE CODES** are selected, the **NOTE** is removed.

Action	Description
4. Click **ADD STEP**.	The rates display in the Commission Grid**.**