

Xactly Extend Custom Applications

Three Custom
Applications That
Streamline Incent
Workflows

Canidium's Custom Xactly Applications



Dispute Workflow App

Enables representatives to quickly initiate disputes on order assignments and amounts, facilitating error correction and ensuring accurate commission calculations.



HR integration App

Automates the process of entering employee data into HR systems by allowing the upload and validation of structured data templates, thus reducing manual entry work.



Manual Adjustments App

Provides administrators with the tools to directly adjust and correct order details and allocations in the system, bypassing the need for multiple approval layers typically required for representatives.

Order Disputes Workflow App



Step-By-Step Guide to Using the Order Disputes Workflow App

What is the Dispute Workflow App?

This app streamlines management and resolution of order-related disputes in the Incent system. It features a search function for locating orders, and allows representatives to initiate and submit disputes over order details for review, avoiding the need for order re-entry. This reduces administrative burdens and helps ensure accurate commission calculations. Users can track dispute status, enhancing transparency and communication between representatives and administrators. The Dispute Workflow app improves operational efficiency and employee satisfaction by simplifying correction processes and ensuring accurate payments.

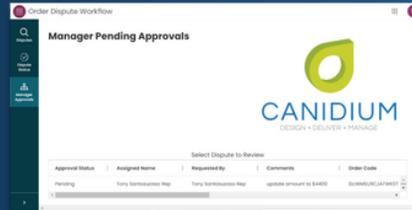
Pricing:

Dispute Workflow App implementation is offered under a fixed fee contract which does not include Xactly's licensing fees:

- **Pricing: \$20K**

Alternatively, If you have an existing managed service contract you can utilize your unallocated hours to implement this app. Clients in need of extensive custom configurations should consult their implementation team to determine additional costs.

Managers or Admins

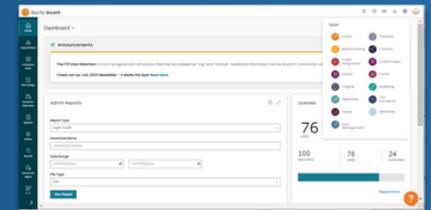


As a manager or admin, you will receive the dispute in your workflow queue. Click on the dispute notification to your pending approvals.

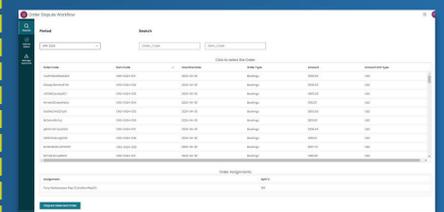
Use the "Make a Decision" button to open this interface. Examine the order information, proposed changes, prior amount, and the comments made by the representative.

If approved, the changes will automatically update the order in Incent, reflecting the new details as specified in the dispute. If rejected, provide a reason in the comments to inform the representative of the decision.

Representatives



Log into the disputes workflow app from your Incent Dashboard by clicking "Custom Apps" on the dropdown menu in the top right corner of your screen.



Use the search function or drop-down menu to find the order you need to dispute. Then, Click the "Dispute" button to start the process.

Enter changes to the order details. Hit the "Enter" button and your submission is routed to an admin or manager, depending on predefined workflow settings.



Monitor the status of your dispute as you await manager approval

HR integration App



What is the HR Integration App?

The HR Integration app simplifies the process of importing new hire data into the Incent system, which traditionally required manual data entry. It allows HR admins to either use a pre-defined template or upload their own filled templates. The app then maps the data fields from the uploaded template to the Incent system and automatically checks for completeness and accuracy. This functionality streamlines the incorporation of new hires into the system, ensuring they are correctly set up for payroll and commission calculations.



Pricing:

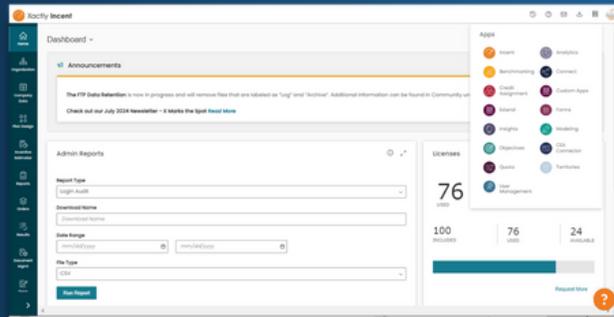
HR Integration App implementation is offered under a fixed fee contract which does not include Xactly's licensing fees:

- **Pricing: \$17K**

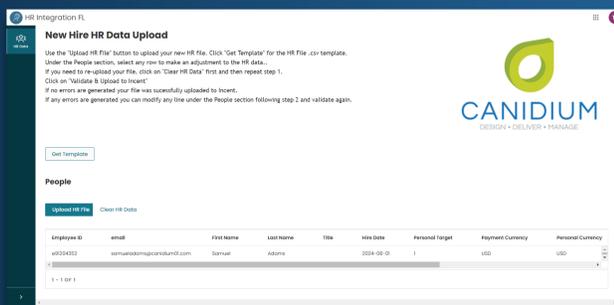
Alternatively, If you have an existing managed service contract you can utilize your unallocated hours to implement this app.

Clients in need of extensive custom configurations should consult their implementation team to determine additional costs.

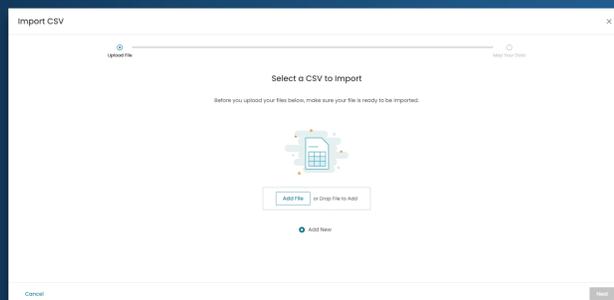
Step-By-Step Guide to Using the HR Integration App



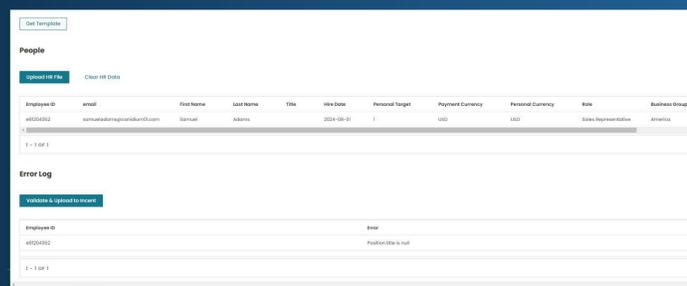
Log into the HR integration app via the "Custom Apps" option on the dropdown menu in the top right corner of your Incent Dashboard.



From the HR Integration app dashboard either download the pre-defined template from the app and fill in the required employee data or use your own.



Upload your filled template. The app will automatically map the data fields from your template to the corresponding fields in the Incent system. It will flag any missing or incorrect information, prompting you to make necessary corrections.



Review the summary of the data integration to ensure all records have been correctly updated or created. Submit your upload and the app will create a new employee in Incent

Manual Adjustments App



What is the Manual Adjustments App?

The Manual Adjustments app is designed to streamline the process of changing order information within the Incent system. This app enables administrators to directly add assignments or adjust order amounts without managerial review. Unlike the Dispute Workflow app, which is tailored for representatives to request changes, the Manual Adjustments app provides administrators with the autonomy to make immediate corrections. This includes adding representatives to specific orders or modifying the order values, thereby ensuring quicker resolution of errors and updates. This direct intervention capability expedites the correction process.



Pricing:

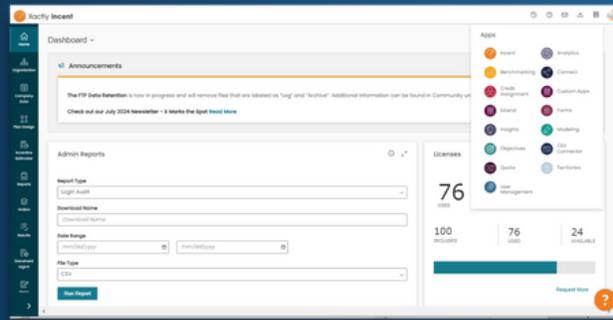
Manual Adjustments App implementation is offered under a fixed fee contract which does not include Xactly's licensing fees:

- **Pricing: \$17K**

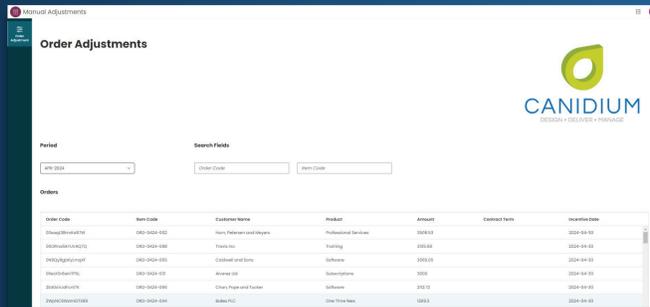
Alternatively, If you have an existing managed service contract you can utilize your unallocated hours to implement this app.

Clients in need of extensive custom configurations should consult their implementation team to determine additional costs.

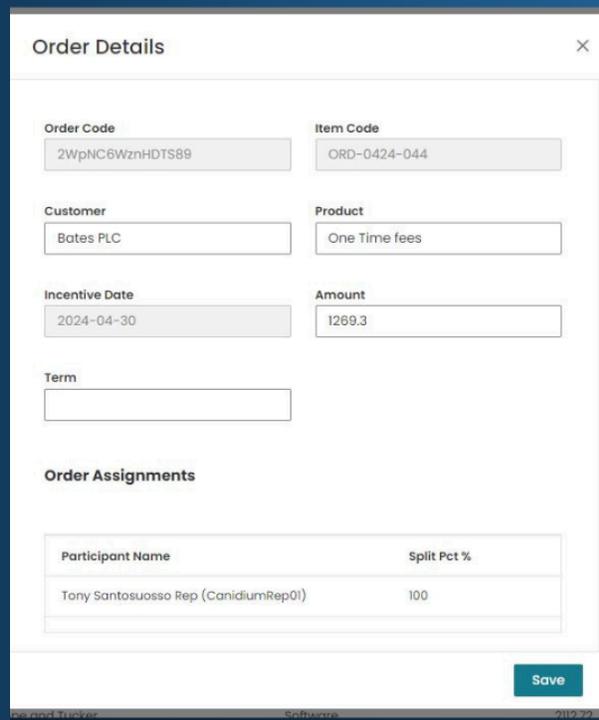
Step-By-Step Guide to Using the Manual Adjustments App



Log into the Manual Adjustments app via the "Custom Apps" option on the dropdown menu in the top right corner of your Incent Dashboard.



Use the search function to locate the specific order that requires adjustment. You can filter orders by various criteria such as date, order number, or representative associated with the order.



If a representative needs to be added to an order, select the option to add an assignment and choose the appropriate representative from a dropdown list or by entering their name.

To modify the order amount, enter the new amount in the designated field. Confirm that the new amount is correct and justified based on the order details.

Once all adjustments are confirmed, save the changes. The app will automatically update the order details in the Incent system.

Ready to Implement a Custom Xactly Extend App?

Reach out to our team of experts [here](#).

