Feature Scope Description | PUBLIC

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Feature Scope Description for SAP Incentive Management, enterprise edition

Content

1 SAP Incentive Management Enterprise Edition

SAP Incentive Management,enterprise edition is a cloud-based solution that automates the incentive compensation processes.

2 Document History

⚠ Caution

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The following table provides an overview of changes to this document.

Version	Date	Description
1.0	2026-03-11	First version

3 About This Document

This document shows you which features are provided with SAP Incentive Management, enterprise edition.

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4 Key Features

Incentive Management Admin

The following table explains the key features available:

Key Feature	Use
Organization Data Management	Administrators can manage participants, titles, positions, and relationships, including creating, updating, and assigning organization data objects.
Compensation Plans	Administrators can create and manage compensation plans, define rules, and assign plans by title or position.
Rules Management	Administrators can create and maintain multiple rule types: credit, measurement, incentive, and deposit.
Classification Data	Administrators can manage categories and classifiers, build category hierarchies, and define classification rules and assignments.
Relationships	When positions are created in the positions workspace, the system automatically creates a reporting roll type that mirrors the organization's reporting structure, and credits are allocated accordingly. Additional roll types and reporting relationships can be created. Relationships can also be imported into the system.
Credit Eligibility Rules	Administrators can configure credit eligibility rules and define territory mappings for generating transaction pre-assignments.
Compensation Rules	Administrators can define credit, measurement, incentive, and deposit rules. A compensation rule is a combination of input, condition criteria, and an output result. Compensation plan rules can be used to specify how the system calculates credits, measurements, incentives, and deposit amounts for participants who are assigned to the plan. Administrators can create and edit rules in the system.
Rate Tables	A rate table is a special-purpose table that is used to calculate incentive compensation for a step commission, where a transaction is paid at different rates when it crosses rate threshold tiers. Rate tables can be used in incentive rules.
Territories	Ability to define territories as named objects using categories and classifiers is supported. Categories and classifiers are associated with products and customers as well as postal codes and other custom classifier types. Territories can filter credits and primary measurement rules and allocate credit for transactions.
Lookup Tables	A lookup table is a multidimensional table that stores a set of numeric-based values. Lookup Tables hold values based on multiple criteria, with outputs representing the intersection of multiple dimensions, and can be applied in any rule or formula, with individual cells having specific effective dates.

Key Feature	Use
Quotas	Quotas are values that apply across an entire reporting structure. Administrators can select multiple period types, and perform automatic sum or distribute functions to distribute the quota values across an organization.
Formulas	A formula rule element is a reusable mathematical expression that can be used in compensation rules, rate tables, or lookup tables. Administrators can also nest formulas within other formulas.
Variables	A variable is a placeholder in a rule or formula for a fixed value, rate table, or territory. Administrators can assign a rule element directly to the variable, the plan, the title, or to the position.
Compensation Calculations	Administrators can execute and manage compensation calculation pipelines, schedule jobs, analyze runtime performance, and configure advanced logging.
Global Values	The Global Values configured determine how compensation elements are used in the system for calculations. The following capabilities are supported: • Calendars: Create or extend calendars that define the fiscal structure used in the system. • Credit Types: Define credit types used in credit rules so credits of different types do not interfere. • Earning Codes: Define earning codes for accounting and assign codes to different types of commissions. • Earning Groups: Define earning groups to subdivide incentives into groups. • Event Types: Define event types that describe the business events associated with transactions. • Fixed Value Types: Define fixed value types that group static numerical values for special purposes. • Position Groups: Define position groups to select position assignments for finalizing payments. • Reason Codes: Define reason codes for manual adjustments and their reasons. • Unit Types: Create or modify unit types to represent numerical values.
Stage Tables	Stage Tables provide the ability to import SAP Incentive Management objects. The following objects can be imported via Stage Tables: • Transaction data – orders, transactions, credits, and deposits. • Organization data – positions, participants, job titles, and roll/reporting relationships. • Classification data – categories, subcategories, classifiers, and classifier assignments. • Other objects – Multidimensional lookup table cells, fixed values, variable assignments, and quotas.
Research View	Research view allows filtering data for Transactions, Credits, Measurements, Incentives, Deposits, and Payments.
Plan Communicator	Ability to manage plan related documents and approvals is available, and dispute management for irregularities in the compensation plan or statement is supported.
Data Protection and Privacy	Supports compliance with global data protection standards, including GDPR.

Key Feature	Use
Audit Management	Administrators can track system and user activities, including object changes, access, and administrative actions.
Data Loaders	Support for data management across multiple workspaces is available. This includes creating or updating data using Excel templates available for download from the UI. Data export is also supported in both Excel and CSV formats for certain workspaces.
Search	The system provides different search options, such as Simple Search, Advanced Search, and Related Search. Using Simple Search, administrators can input keywords to search for specific information. In Advanced Search, administrators can construct a search by selecting specific fields. The Advanced Mode uses SQL-like syntax to form a search. In some workspaces, the Related Search view enables finding information related to the objects selected in the summary pane.
APIs	REST APIs are available to develop integrations between SAP Incentive Management and other applications, supporting HTTPS requests such as PUT, DELETE, POST, and GET for certain objects.

Incentive Management Portal

The following table explains the key features available:

Key Feature	Use
Payee experience	Users can view published dashboards and widgets with real-time insights into the team's performance and track compensation progress. The ability to proxy to view dashboards as another participant or position is supported.
Dashboard and Widget Management	Administrators create and organize dashboards using configurable widgets that display key payee information for a consolidated overview. Ability to build multiple dashboards with different widget combinations is supported.
Proxy Relationship	Administrators can create or update proxy users to manage access. Proxy users can share permissions without editing the original user's profile.
Customization	Administrators can customize the user interface labels in Incentive Management Portal to suit the organization's specific requirements. Ability to configure email notifications and associated templates is supported.
Global Settings	Allows the configuration of password policies, e-mail settings, authentication settings, log settings, and branding settings.
User Administration	Allows the configuration of user roles and permissions.

Express Data Loader

The following table explains the key features available:

Key Feature	Use
Data Import and Export	Supports secure import and export of business data and synchronization across key across key Incentive Management business objects such as Orders, Transactions, Participants, Positions, Titles, Categories, Products, Customers, and Postal Codes. Inbound transfers upload data into Incentive Management, while outbound transfers extract data from Incentive Management. Configurable file type settings are available.

Modeling

The following table explains the key features available:

Key Feature	Use
Modeling	Administrators can simulate compensation plan changes and evaluate their potential outcomes. Rate Tables, Fixed Values, and Lookup Tables are adjustable to create, test, and understand the impact of the changes on the compensation plans.

Data Manager Self-Service

The following table explains the key features available:

Key Feature	Use
Touchless Deployment	Administrators can develop and deploy custom database changes in the EXT schema across production and non-production environments, eliminating many manual steps and enabling quick deployment. Detailed logs for troubleshooting are supported.
Backup and Restore	Automates creating and restoring database schema (EXT and TCMP) to enable data migration across environments.The system validates eligibility before execution and sends status notifications of completion or failure.

Reports

The following table explains the key features available:

Key Feature	Use
Integration with Embedded Analytics	SAP Incentive Management supports the integration with Embedded Analytics, which is an implementation of SAP Analytics Cloud with reduced capabilities. The integration is designed to enable users to explore data, find insights, and visualize information, which can help support data-driven decisions to drive business outcomes. Stories using data models can be managed by administrators and author users. Users can use the data exploration and visualization tools to identify outliers, trends, and view operational, historical, and multi-period data.
SAP Crystal Reports Integration	SAP Crystal Reports is available with the SAP Incentive Management, enterprise edition. This integration allows users to generate detailed, formatted, pixel-perfect, and customizable reports based on sales compensation/Crystal data for strategic insights. Users can design and publish SQL-based reports in PDF/XLS formats through seamless integration. By transforming compensation information into meaningful insights, these reports help drive improved performance and profitability, making them ideal for documents such as invoices or financial statements that require high visual accuracy.

Advanced Workflow

The following table explains the key features available:

Key Feature	Use
Workflow Transition Matrix	Administrators can use Workflow Transition Matrix to define and customize workflows for desired processes with unlimited numbers of statuses and actions.
Action Properties	Action Properties is a centralized place where administrators can configure all aspects of an action for desired process including permissions, notifications, assignment rules, script execution and more.
Form Designer	Administrators can use Form Designer for customization of page layouts by defining various types of custom fields, forms and UI components. Each action can have its own form with fields.
Custom Fields	Administrators can create and configure custom fields to store information that supports different elements of any business processes.
Custom Tables	Administrators can create custom tables to store and manage data related to workflow configurations or case data.
Scripts and Script Editor	Advanced Workflow supports custom scripts that can help create tailored solutions for specific business requirements. Scripts can be used to manipulate data, automate tasks, and integrate with external systems. The platform includes a modern script editor with features like code completion, syntax highlighting, and version comparison.

Key Feature	Use
Custom Parameters	Administrators can set custom parameters to personalize information to use across various Workflow workspaces
Users and Permissions Management	Administrators can create and manage users and set up Permission Groups to configure access to cases, menu items, actions and data inside cases. Users can view and update their profile information, upload images, and manage notification settings.
Notifications	Administrators can define exactly who will be notified with which Email Template for which event.
Service Level Agreements (SLAs) & Reminders	Users can set up Service Level Agreements (SLAs) to ensure timely case resolution, or to set up various kinds of reminder notifications to help users complete their work in desired timeframe.
Email Templates	Users can create customizable e-mail templates that they can use to send notifications about workflow actions.
Scheduled Tasks	Scripts can be scheduled to run at specific intervals, automating routine tasks and ensuring timely execution of processes.
Project Management	Administrators can group cases into projects for better organization and tracking, define project roles and permissions to manage case assignments and visibility and use custom fields.
Find Cases	Users can search and filter case data by various criteria including custom fields, dates, and more.
Lists	Users can create static and dynamic lists to manage cases. Lists can be featured for easy access. Administrators can configure which lists are visible on the Home page in Home Page Layout Designer.
View Cases	Users create and view cases, as well as modify them by performing actions.
Actions Panel	Displays available actions based on case status and permissions. Users can perform actions like following a case, downloading case details, adding comments, attaching files and more.
Migration Manager	Migration Manager is used to migrate components to a different tenant, as well as to save exported files as backup data. Most components can be migrated, for example: cases, workflows, custom actions, reusable forms, custom fields, scripts, users and so on.
Rest API	Enables other applications to collaborate with Workflow. It's also possible to use these APIs to integrate Advanced Workflow with any external application.

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