A Buyer's Guide: Xactly Extend Custom Applications by Canidium

Applications that
streamline Incent workflows.

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What Is Xactly Extend?

Xactly Extend is designed to simplify and improve business processes. It allows Xactly users to create custom applications that automate routine tasks like payroll approvals and quota setting.

Extend also offers robust reporting and analytics tools to give you clear insights into your business performance. It also unifies disparate data sources from CRM, HCM, and ERP systems, enabling real-time insights and improving cross-departmental communication.

Canidium's Custom Apps

Leveraging Xactly Extend and over a decade of experience helping businesses implement the platform, Canidium's team developed three custom applications for Incent users.

These applications are the first of their kind. simultaneously demonstrating the potential of Xactly Extend and packaging some of Canidium's custom configurations that streamline manual workflows.

This Buyer's Guide covers all three apps. It will explain what they do, their benefits, how to use them, and the cost of implementing them.

Canidium's Applications

Dispute Workflow
Powered By CANIDIUM

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

HR Integration
Powered By CANIDIUM

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
Powered By CANIDIUM

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.

Disputes Workflow App

What is the Dispute Workflow App?

The Order Disputes Workflow app is designed to automate and simplify the process of correcting and updating order information in Xactly Incent. It helps reduce manual work and mitigate human errors by allowing users to easily adjust order details, such as who gets credit or the amount of a sale, and ensures these changes are properly tracked and validated. 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. 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.

At the same time, by automating traditionally manual dispute processes, the app facilitates greater accuracy in data handling and processing, leading to more reliable outputs in terms of commission calculations and other data management tasks.

Benefits of The Dispute Workflow App

- **Automation of Manual Processes:** Reduces the need for manual data entry and adjustments, thus saving time and eliminating human error.
- **Error Handling and Validation:** Automates the validation process, ensuring all required fields are correctly filled and formatted, and providing clear error messages when issues arise.
- **Streamlined Data Integration:** Makes it easier to integrate new hire data and adjustments into the system without extensive manual intervention.

# How does the Dispute Workflow App work for managers and admins?
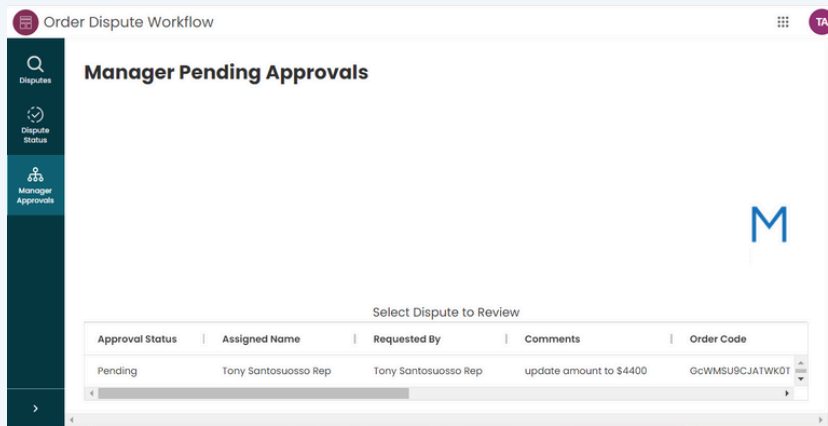
As a manager or admin, you will receive the dispute in your workflow queue. Click on the dispute notification to your pending approvals.
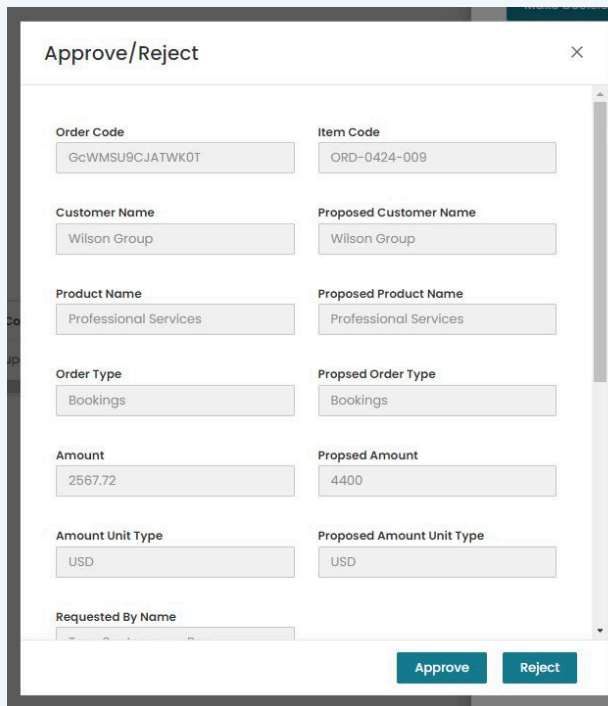

Use the "Make a Decision" button to open this interface. Examine the order information, proposed changes, prior amount, and the comments made by the representative. If approved, the changes will automatically update the order in Incent, reflecting the new details as specified in the dispute. If rejected, provide a reason in the comments to inform the representative of the decision.
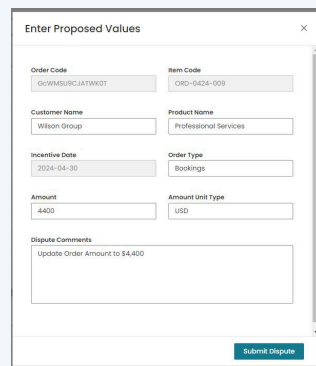
How does the Dispute Workflow App work for representives?
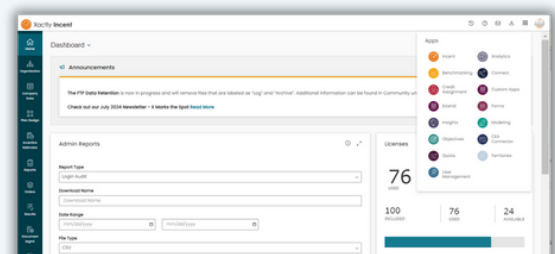
Log into the disputes workflow app from your Incent Dashboard by clicking "Custom Apps" on the dropdown menu in the top right corner of your screen.
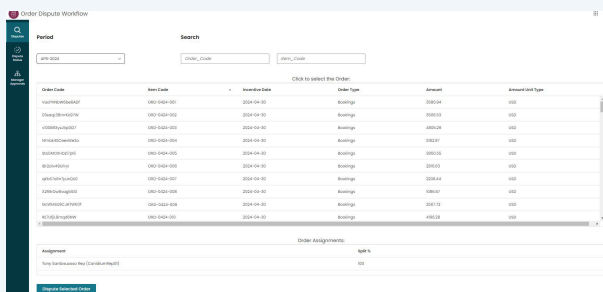
Use the search function or drop-down menu to find the order you need to dispute. Then, Click the "Dispute" button to start the process.

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.
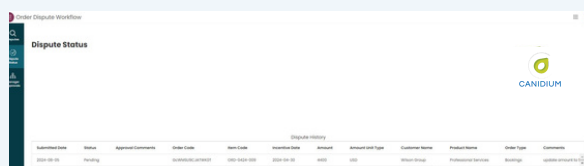
Monitor the status of your dispute as you await manager approval

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.

The app addresses the need to streamline the process of integrating HR data, especially in scenarios where new employees are added to the system, which traditionally required manual data entry.

By automating manual HR processes, the app not only saves time but also improves the accuracy of the data entered into the system, ensuring that new employees are correctly set up in the system from the start, which is crucial for processes like payroll and commission calculations.

The Benefits of The HR Integration App

- **Reduced Manual Entry:** The app significantly cuts down on the need for manual data entry, which is particularly beneficial when dealing with large batches of new hires.
- **Data Accuracy:** Automated validations help ensure that the data entered is accurate, reducing the potential for errors that can occur with manual data entry.
- **Customization and Flexibility:** The ability to customize the data template according to specific HR requirements allows the app to be flexible and adaptable to different organizational needs.

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.
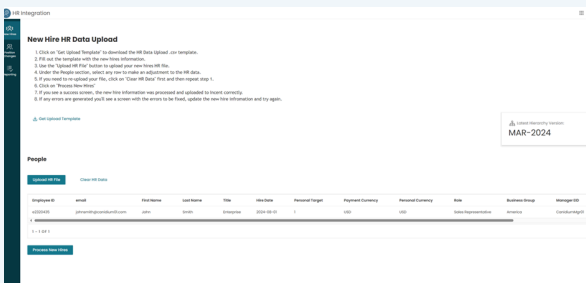
From the HR Integration app dashboard either download the pre-defined template from the app and fill in the required employee data or use your own.
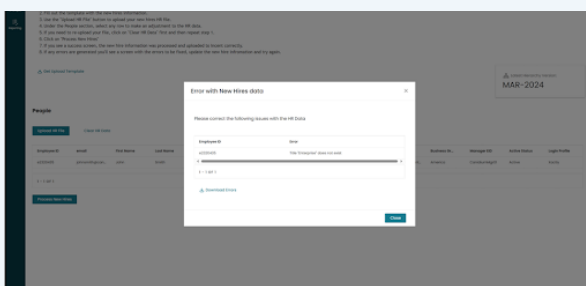
Using your filled template, the app will automatically map the data fields to the corresponding fields in Incent. It will flag any missing or incorrect information, prompting you to make necessary corrections.
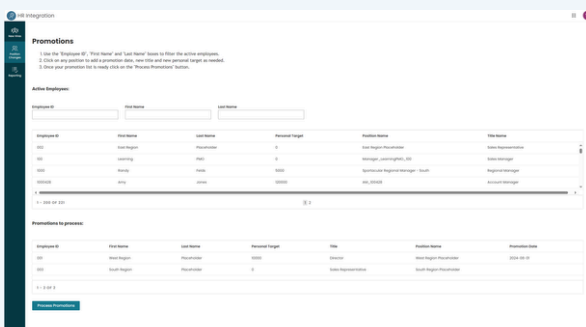
Review the summary of the data integration to ensure all records have been correctly updated or created. Submit your upload and the app will create a new employee in Incent

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.

The Manual Adjustments app is developed to facilitate the direct and immediate correction of order details within the incent system. This app is particularly useful for system administrators who need to make frequent and specific adjustments to order records, such as correcting sales amounts or adjusting who gets credit for a sale.

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.

Benefits of The Manual Adjustments App

- **Efficiency:** Enables quick and direct adjustments to order details, significantly speeding up the correction process compared to traditional manual methods.
- **Accuracy:** By providing a structured way to make adjustments, the app helps maintain data accuracy and integrity within the system.
- **Control and Oversight:** Designed for use by administrators, the app provides a level of control and oversight over manual adjustments, ensuring that changes are deliberate and traceable.

How does the Manual Adjustments App work?


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.

To add a representative to an order, select '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.

After it's saved, the app will automatically update the order details in the Incent system.

Implementation Pricing

Dispute Workflow, HR Integration, and Manual Adjustments App implementation fees are offered under a fixed fee contract which does not include Xactly's licensing fees.

Canidium clients with an existing managed service contract can utilize unallocated hours to implement a custom Xactly Extend app.

It is important to note that the following fixed fee costs do not cover all potential scenarios. Clients in need of extensive custom configurations should consult their implementation team to determine additional costs.

Dispute Workflow
Powered By CANIDIUM   **$20k**

HR Integration
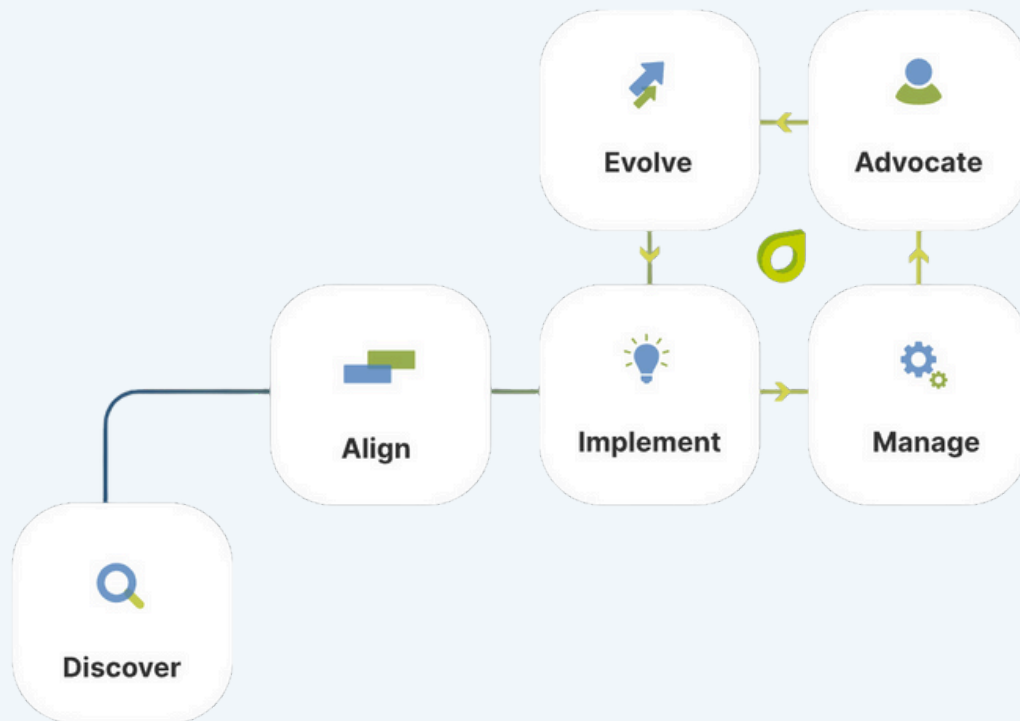Powered By CANIDIUM   **$17k**

Manual Adjustments
Powered By CANIDIUM   **$17k**

Working with Canidium

Discover
What are your current processes? Pain points? Goals? Through interviews, workshops, and documentation review, we assess your requirements to identify the key objectives of the implementation.

Align
You'll work with the implementation team to map out current workflows, define new processes, and create an implementation roadmap.

Implement
During implementation, we'll configure the software to meet your specific requirements, integrate it with other systems (such as CRM and ERP), and test the solution.

Manage
The focus shifts to managing and maximizing its performance. We'll train users, monitor system performance, and adjust as needed to optimize the solution.

Advocate
We'll help you highlight success stories, conduct training sessions, and provide ongoing support to ensure the project's success.

Evolve
We'll evaluate and evolve the software by implementing new features when appropriate, exploring integrations, and optimizing processes to improve performance and ROI.

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Ready to Implement a Custom Xactly Extend App?

Reach out to our team of experts today.