

19-03-2024

# Functional Requirement Document

The logo for Techne AI consists of the word 'TECHNE' in a grey, bold, sans-serif font, followed by 'AI' in a larger, bold, sans-serif font. The 'A' is pink and the 'I' is yellow. A thin horizontal line is positioned below the text.

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### 1. TICKET DETAILS

<b>Ticket ID</b>	TT18548
<b>Ticket description</b>	MY CS APP Dashboard
<b>Created by</b>	Vikram Kadre
<b>Created on</b>	
<b>Priority</b>	Medium

### 2. VERSION CONTROL

Sr. No	Version no	Version Date	Username	User department
1	1	20-12-2023	Vikram Kadre	Data Analyst
2	2	12-02-2028	Vikram Kadre	Data Analyst

### 3. APPROVALS

Field	Name of the User	Approved date by the user
<b>Actual Username</b>	Vikram Kadre	
<b>Actual User</b>	Data Analyst	
<b>Department</b>	CSPL	
<b>Organization Name</b>		
<b>Assigned BA</b>	Priyanka Gole	
<b>Assigned Developer</b>	Mustafa siyam	
<b>Assigned Tester</b>	Amruta Kore	
<b>Assigned UI/UX Designer</b>	Prajakta Gosavi	

#### 4. ESTIMATION

Department name	Estimated Time (In hr)	Scheduled Date (Starting date)	Estimated date	Actual delivery date
BA	24			
Development				
Testing				
UI UX	8			

#### 5. INTRODUCTION

My CS App is a mobile application for CS users with multiple functionalities like Attendance, feedback, Sales Incentive detail's view. In the same way, we will make changes to My CS App regarding a new SIP, i.e. Smart Incentive Plan.

#### 6. BUSINESS REQUIREMENT

SIP is developed on web application and in this ticket, we will just fetch some significant figures and display on the mobile app.

Requirement ID	Requirement Name	Short Description	Priority
BR001	Notification to salesperson	Daily Salesperson will get notification for Incentive.	High
BR002	Chart to show incentive	At the click of the notification salesperson will view incentive details like year, period, till date incentive and today's Incentive.	High
BR003	Product Group wise Incentive Bifurcation	Salesperson can view bifurcated view of today's, till date and projected incentive with respect to product groups.	High
BR005	Spiral Graph according to designation	According to the designation of employee, he will view incentive figures.	High
BR006	Branch Level Performance	In addition to salesperson incentive details, he can view branch performance with details	High
BR007	Performance Meter	Salesperson can view progress with respect to relevant scheme.	High
BR008	Ticket Size Deduction	If the Previous month selected, then ticket size deduction should be seen else for the future/current month ticket size deduction should not be available as it calculated on overall incentive.	High

## 7. SCOPE

The Scope of this module is to show sales incentive to salesperson in detail. Product group wise, Detailed product group wise. Even he will be able to view today's incentive.

## 8. BUSINESS & SYSTEM RULES

- Incentive should be generated on the web based module i.e connect US 1.0.
- Once synced from POS system and calculated on the connect us 1.0, incentive data will get fetch on the connect us.
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## 9. ABBREVIATIONS & TERMS

Sales Incentive - SI

## 10. EXISTING SYSTEM

Enter all the data related to the existing system and attach all the necessary attachments provided by the user.

## 11. GRAPHICAL REPRESENTATION

<https://www.figma.com/proto/8HO7QneTD8ZeUhGX0394HT/My-CS-app?type=design&node-id=276-4601&t=IX1PioPAoZX4fhCE-0&scaling=contain&page-id=131%3A464&starting-point-node-id=276%3A4601&show-proto-sidebar=1>

## 12. PROPOSED SYSTEM

### BR001: Notification to salesperson

Sales data synced daily in the system, once data synced salesperson should get notification for yesterday's sales data incentive.

Notification will be like below

"Sales data has been synced till <date>. Click to view more details"

### BR002: Chart to show incentive- yesterday's incentive, Till date Incentive and Projected Incentive.

Under this requirement, salesperson will be able to view incentive in below format yesterday's incentive, Till date Incentive and Projected Incentive.

Field Name	INPUT TYPE	IS EDITABLE	DESCRIPTION
Financial Year	Label	NO	It shows the current Financial Year.
Current Month	Label	NO	It shows the current Month.
Last Updated Date	Label	NO	It will show the last synced and incentive calculation date. It is maintained on

			the web on period target setting page.
Financial Year	Drop Down	YES	It will show the data from Year Master as financial year. Previous year can be selected from drop down. By default, value is current FY year
Month	Drop Down	YES	It will show list of periods from period master, it is dependent on Year Master
Last Incentive	Label	NO	<b>It will show last synced date incentive</b>
Till Date Incentive	Label	NO	<p>According to employee's id and name, the overall incentive amount from period-wise target-wise achievement report will be shown here. It will show incentive amount till last synced date to the salesperson.</p> <p>In the case of previous month, the till date incentive will display the total incentive.</p>
Projected Incentive	Label	NO	<p>It is the projected incentive, which could get to the salesperson based on performance. It is calculated as "till date Incentive/complete days*period days".</p> <p>In the case of previous month, the projected incentive will not appear.</p>
Gold O	Button	NO	<p>On click of the Button, Gold O product group wise incentive details will be visible.</p> <p>It will be clickable for <b>sales Executive designation only</b>. System will throw message as "no data found".</p>

Diamond	Button	NO	<p>On click of the Button, Diamond product group wise incentive details will be visible.</p> <p>It will be clickable for <b>sales Executive designation only</b>. For rest designation, system will throw message as “no data found”.</p>
Silver O	Button	NO	<p>On click of the Button, silver O product group wise incentive details will be visible. It will be clickable for <b>Silver sales Executive designation only</b>. For rest designation, system will throw message as “no data found”, if no data available.</p>
Scheme	Button	NO	<p>On click of the Button, scheme related incentive details will be visible.</p> <p>GDP is the name of the bhishi scheme, in future it may change. Accordingly, the name of the tab will change.</p> <p><b>It is common for all designations who worked on scheme.</b></p>
Performance meter	Button	NO	<p>On click of the Button, employee wise performance level will be visible. On click of each block's performance will vary.</p> <p><b>It is common for all designations like sales executive and silver sales Executive.</b></p>
Branch Level Performance	Button	NO	<p>On click of the Button, Branch wise all the incentive achieved % will be visible.</p> <p>It will show data of logged</p>

			in users branch only irrespective of designation.
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### BR003: Product Group wise Incentive Bifurcation

Salesperson can view product group wise incentive details like Gold O, Silver O, Diamond, GDP, Branch level achievement %, Performance meter.

Under this project we are just fetching data from web application to mobile application. Incentive is calculated on the web application and fetched on mobile application for salesperson view purpose. On the web application, under sales Incentive, Period Wise Target wise achievement Report is available. This report shows all the required fields for view.

Below table will be visible according to designation of salesperson. Like Gold Salesperson has designation as 'Sales executive', silver salesperson has designation as 'silver sales executive'.

According to the logged-in user designation, user can view product group-wise incentive details. Like sales Executive can view Gold, Diamond, GDP and Branch level performance expect Silver. And Silver sales Executive can view Silver, GDP and Branch level performance expect Gold, Diamond.

#### Input table

FIELDS	DESIGNATION	WEB BASED FIELD	DESCRIPTION
Employee Overall %	Sales Executive	emp_overall_achievement_per	It will show employee-wise overall (Gold O, Silver O, Diamond, Diamond Jewellery, sterling silver, Stone) % achieved in a month except Gold and silver Bullion. <b>Formula</b> – employee wise Sum of actual sale amount/ employee wise Sum of Revised Target amount%
Gold O achievement %	Sales Executive	gold_o_achievement_per	It will show gold O product group's achievement % in a month. <b>Formula</b> – employee wise Sum of actual sale in Gold Ornaments rate group qty /Sum of Proposed Target qty of Gold O%
Diamond	Sales	diamond_carat_achiev	It will show employee

Achievement %	Executive	ement_per	<p>wise Diamond product group's achievement % in a month.</p> <p><b>Formula</b> - employee wise Sum of actual sale qty of Diamond / employee wise Sum of Proposed Target qty of Diamond/ %</p>
Diamond Business Mix %	Sales Executive	employee_diamond_business_mix_per	<p>It will show employee-wise DJ and D achievement against overall proposed target of (Gold O, Gold Bullion, Silver O, Silver Bullion, Diamond, Diamond Jewellery, Stone) in a month.</p> <p><b>Formula</b> – Emp wise sum of actual sale amount of DJ and D /Emp wise Sum of Proposed Target amount of all product group %</p>
Star Product %	Sales Executive	Not Available	<p>It will show emp wise Gold Star product sale %</p> <p><b>Formula</b> - (Emp wise Actual star product sale) / Employee wise Gold O proposed target wt</p>
Silver O achievement %	Silver Sales Executive	silver_o_achievement_per	<p>It will show Silver O product group's achievement % in a month.</p>
Sterling Silver Achievement %	Silver Sales Executive	Not Available	<p><b>Formula</b>- sterling_silver_achievement / sterling_silver_target</p>
Sterling Silver Business Mix %	Silver Sales Executive	employee_SS_business_mix_per	<p><b>Formula</b> - Sterling silver actual sale amount / sum of proposed target amount of silver O,</p>



			silver Bullion, Sterling silver%
Star Product %	Silver Sales Executive	Not Available	It will show emp wise Silver Star product sale % <b>Formula</b> - (Emp wise Actual star product sale) / Employee wise Silver O proposed target wt

#### BR004: Branch Level wise Product Group Incentive Bifurcation

Logged In user can view his own Branch level wise product group Incentive.

FIELDS	DESIGNATION	WEB BASED FIELD	DESCRIPTION
Branch Overall %	All designations	branch_achievement_percent	It will show Branch-wise overall (Gold O, Silver O, Diamond, Diamond Jewellery, Sterling Silver, Stone) % achieved in a month with discount <b>Formula</b> – Sum of actual sale amount / Sum of Revised Target amount %
Diamond Business Mix %	Sales Executive	branch_diamond_business_mix_per	It shows branch wise Diamond Business Mix % <b>Formula</b> - sum of the D+DJ actual amount / Proposed target amount of all product group.
SS Business Mix%	Silver Sales Executive	branch_SS_business_mix_per	It will show gold O product group's achievement % in a month. <b>Formula</b> - Sterling silver actual sale amount / sum of proposed target amount of silver O,

			silver Bullion, Sterling silver%
Gold O Star Product%	Sales Executive	Not Available	It shows branch wise gold star Product % in a month. Derive from the back end. <b>Formula</b> - Sum of actual sale Gold star product net wt / Sum of Proposed Target qty of Gold O%
Silver O Star Product%	Silver Sales Executive	Not Available	It shows branch wise Silver Star Product % in a month. Derive from the back end. <b>Formula</b> - branch wise Sum of actual sale silver star product net wt / Sum of Proposed Target qty of Sliver O%

### BR005: Performance Meter Incentive Logic

Make a provision to maintain benchmark in the backend, it will be configurable.

Logic	Description	Web Based Field	Bench mark	Poor	Average	Good	Excellent
2X conversion	It shows 2X conversion performance of Sales employee. Value comes from Period Wise Target wise achievement Report	bhishi_2x_ach_per	2	<1.5	1.6-2.2	2.3-2.5	>2.5
Pre-mature	It shows % of prematurely closed bhishi . <b>Formula:</b>	Not available	5	>7%	-	5-7%	<4.9%
Re-enrollment	It shows % of customers who enrolled bhishi after closing bhishi. <b>Formula:</b>	Not available	50%	<25%	-	25-50%	>51%
Bill to GDP	It shows the	Not	18%	<12%	-	12-18	>18.1%

	number of unique customers per day % against no of new enrollment bhishi. <b>Formula:</b>	available				%	
Scheme Achievement	It shows bhishi enrollment amount of a salesperson in a month.	bhishi_achievement	50000	<50000	50000-70000	70001-100000	>100001
Ticket Size Gold	It shows achievement of ticket size Gold out of ticket size target <b>Formula:</b> empwise_gold_o_ticket_size_ach / Gold O ticket size target <b>Source:</b> For target: sales incentive -> sales master -> ticket size target setting and for achievement backend sheet	Not Available		<95%	95-100	101-105	>105.1%
Ticket Size Diamond	It shows achievement of ticket size Diamond out of ticket size target <b>Formula:</b> empwise_diamond_ticket_size_ach / Diamond ticket size target <b>Source:</b> For target: sales incentive -> sales	Not Available		<95%	95-100	101-105	>105.1%

	master -> ticket size target setting and for achievement backend sheet						
Ticket Size Silver	<p>It shows achievement of ticket size Silver out of ticket size target</p> <p><b>Formula:</b> empwise_silver_o_ticket_size_ach / Silver O ticket size target</p> <p><b>Source:</b> For target: sales incentive -&gt; sales master -&gt; ticket size target setting and for achievement backend sheet</p>	Not Available		<95%	95-100	101-105	>105.1%

### 1. 2X conversion

Derived in web based Sales Incentive as bhishi\_2x\_ach\_per.

### 2. Bhishi Premature

It shows % of bhishi closed prematurely in a month against a sales employee.

### 3. Bhishi Re-enrollment

It shows % of bhishi re-enrolled (closed maturely or prematurely then enrolled again) in the system. Based on the customer's name, we can understand bhishi closed (maturely or prematurely) and enrolled once again in a system. The salesperson of the "GDP Scheme New Member" document is responsible for re enrollment of bhishi with same customer name.

Consider closed bhishi document and bhishi redemption voucher also.

### 4. Bill To Bhishi

It shows the % of the number of unique customers per day against no of new bhishi enrolled in a month. Customer name is considered to match the data.

### 5. Scheme Achievement

It shows bhishi enrollment amount of a salesperson in a month.

### 6. Ticket Size Gold

Gold ticket size in gm = Total net wt of gold O/ no of gold O product group wise unique customers per day.

### 7. Ticket Size Diamond

Diamond Ticket Size in Amount = Total amount of diamond and Diamond Jewellery/ No of Unique Customers per day.

### 8. Ticket Size Silver

Silver ticket size in gm = Total net wt of Silver O/ no silver O of product group wise unique customers per day

### BR006: Ticket Size Deduction tab

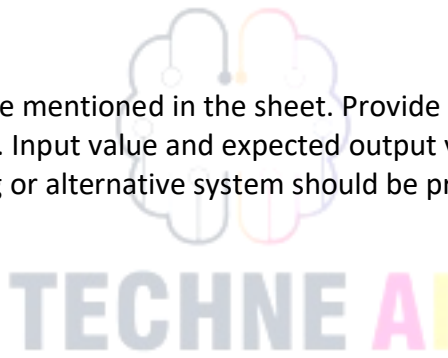
Ticket size deduction tab is visible for previous months only. As the ticket size deduction is calculated on total incentive no need to visible for current months It will show Gold O ticket size deduction, Silver O Ticket size deduction and Diamond Ticket size deduction.

## 12. TEST DATA

Multiple examples can be mentioned in the sheet. Provide multiple scenarios for each field in the module. Input value and expected output value should be specified. Live examples in existing or alternative system should be provided if possible.



TEST DATA SHEET.xlsx



## 13. ODUS ( Open Discussed Unhanded scenarios )

ODUS sheet will contain questions raised by team which needs to be confirmed from user, points to be discussed with user, confirmation of points which isn't given from user yet.

Sr. No.	Topic	Priority (High / medium / low)	Remark	Status (Open/ Closed)
1	As of now multiple schemes are available so, GDP is renamed to scheme achievement,			
2	Provide the formula for re enrollment is any			
3	Is the Bill to GDP useful now. If yes please tell me which			

	schemes need to add more			
	Provide the formula for bill to GDP			
	We do not have day wise incentive. So, day wise graph not possible.			

#### 14. REFERENCES OF THE USERS

User	Name	Mail	Contact number
Actual user	Vikram Kadre		
Ticket created by (if any)	Vikram Kadre		
Assigned business analyst	Priyanka Gole		
Assigned developer	Nikhil Bhosale		
Assigned tester	Amreen Shaikh		

