14.09.2023

Functional Requirement Document

[Connect-us
Sales Incentive
New Structure]

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CONTENTS

1. TICKET DETAILS

Ticket ID	TT16520
Ticket description	Sales Incentive New Structure
Created by	Priyanka Gole
Created on	14-09-2023
Priority	Very High

2. VERSION CONTROL

Sr. No	Version no	Version Date	Username	User department
1	1	14-09-2023	Dinesh Sonawane	Audit Department
2	1.2	10-11-2023	Dinesh Sonawane	Audit Department
3	1.3	28-12-2023	Dinesh Sonawane	Audit Department
4	1.4	31-05-2024	Dinesh Sonawane	Audit Department

3. APPROVALS

Field	Name of the User	Approved date by the user
Actual Username Actual User Department Organization Name	Dinesh Sonawane Audit Department CSPL	25-09-2023
Assigned BA	Priyanka Gole	
Assigned Developer	Prathmesh Shinde, Punam Shinde, Nikhil Bhosale, Namrata Pawar	
Assigned Tester	Preeti Bokade, Prathmesh Kulkarni, Amruta Kore	

4. ESTIMATION

Department name	Estimated Time (In	Scheduled Date (Starting date)	Estimated date	Actual delivery date

	hr)			
BA	21	14-09-2023		
Development (Punam Shinde)	100			
Testing	42			
Development (Namrata Pawar)				

5. INTRODUCTION

We are developing a new structure for sales incentive. Sales Incentive is the reward offered to individuals or teams in an organization as a motivational tool to encourage them to achieve specific sales goals, targets, or performance objectives. These incentives can come in monetary bonuses, and they are designed to boost sales performance, increase motivation, and drive revenue growth within a company. Sales incentives help align the interests of salespeople with the organization's goals, fostering a competitive and driven sales culture.

In this module, we will explore the new structure of sales incentive calculations that we are implementing. This exciting change is aimed at enhancing the motivation and performance of our sales team while aligning with our strategic goals.

Sales incentives are a crucial component of our sales strategy, motivating our sales force to achieve their targets and drive revenue growth. In this section of the BRD, we will outline the key changes and improvements in how we calculate and administer sales incentives.

This section will serve as a comprehensive guide to the updated methodology, criteria, and processes involved in determining sales incentives. This document will provide you with a clear understanding of the new incentive structure and its implications.

Let's explore the exciting changes and enhancements in our sales incentive calculation methodology together, ensuring that our sales force is motivated and well rewarded for their outstanding efforts in driving our business forward.

6. BUSINESS REQUIREMENT

Requirement ID	Requirement Name	Priority

BR001	Product wise, grade wise incentive generation for Sales Emp	High
BR002	Bhishi Linked Diamond	High
BR003	Bhishi 2 X conversion	High
BR004	Business Mix for Sales Emp	High
BR005	Business Mix for CM, BM, OM, FM	High
BR006	Regular Bhishi Incentive	High
BR007	Negative impact on Incentive - Non purchase Customer	Medium
BR008	Negative Impact on Incentive - Ticket Size	Medium
BR009	Reports	Medium

7. SCOPE

Scope of this project is to generate sale incentive for sales Employee. Through multiple ways sales employees will get incentive. Upon generation of total incentive, there are some conditions which will effects on incentive payout. Prepare new reports to show employee sales incentive, bhishi Incentive and Bhishi Linked Diamond Incentive, Bhishi 2X conversion. In this new system we will generate monthly` incentive.

8. BUSINESS & SYSTEM RULES

- **Prerequisite**
  - Set Branch wise Monthly Target
  - Set Counter wise Target group mapping
  - Set Branch wise counter wise targets
  - Set counter Employee mapping
  - Set Grade to sales Employee
  - Grade wise employee Target generation
  - Daily Synch Sales, Sales return data
  - Setting in Item master for sterling silver, small ornament for proper incentive calculation.
  -

- **Business Rules**
  - Branch should achieve min 50% revised target for incentive payout.
  - Sales Employee should achieve min 50% revised target for incentive payout except bullion.
  - In addition to regular sales Incentive, sales employee will get other incentive also like Business Mix, bhishi linked diamond, Bhishi 2X conversion, Bhishi Incentive if he/she is achieving respected targets.
  - After the final generation of incentive, there are 2 negative impacts like non purchase customers and ticket size. If any of these are not achieved, then 5% incentive will be deducted from overall incentive except bhishi incentive.
  - Below are the product group wise designations:
    - ◆ Gold Sales Employee – Sales Executive
    - ◆ Silver Sales Employee – Silver Sales Executive
    - ◆ Diamond Sales Employee – WJD Sales Executive

9. ABBREVIATIONS & TERMS

GO - Gold Ornament
SO - Silver Ornament
CT - Diamond Carat
Gm - gram
SS - Sterling Silver

10. EXISTING SYSTEM

In the existing system, Incentive was calculated and paid Quarterly but in the new incentive structure, incentive calculated and paid monthly.
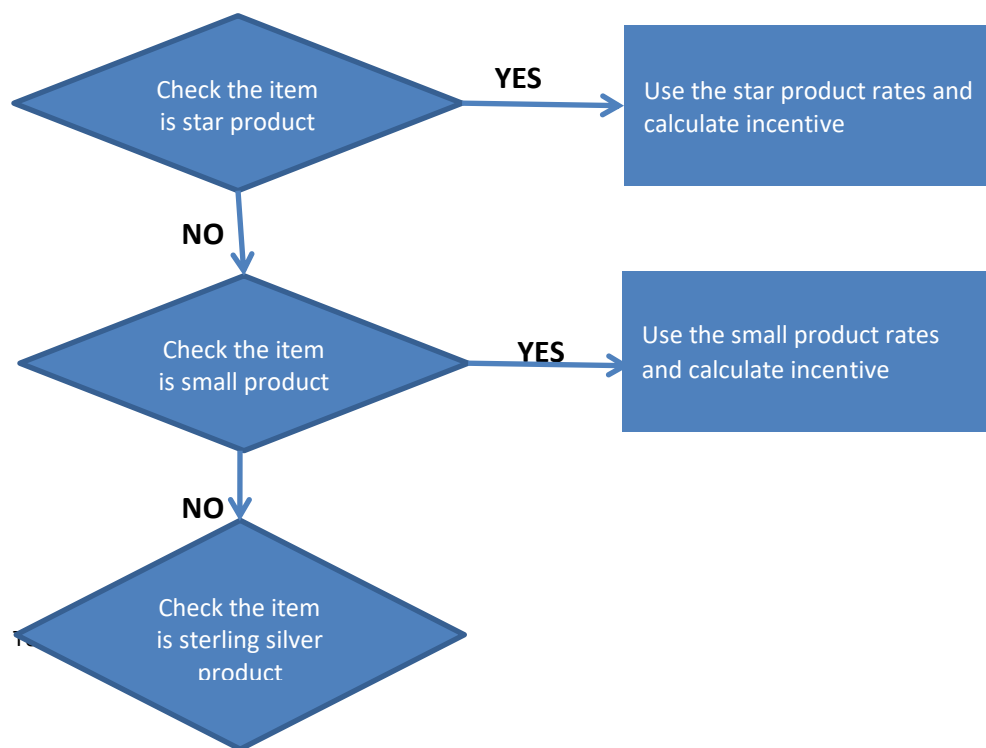
Employee-wise incentive calculation was based on grades and target achievement slabs, but now it is based on sold net wt or amount of the product group.
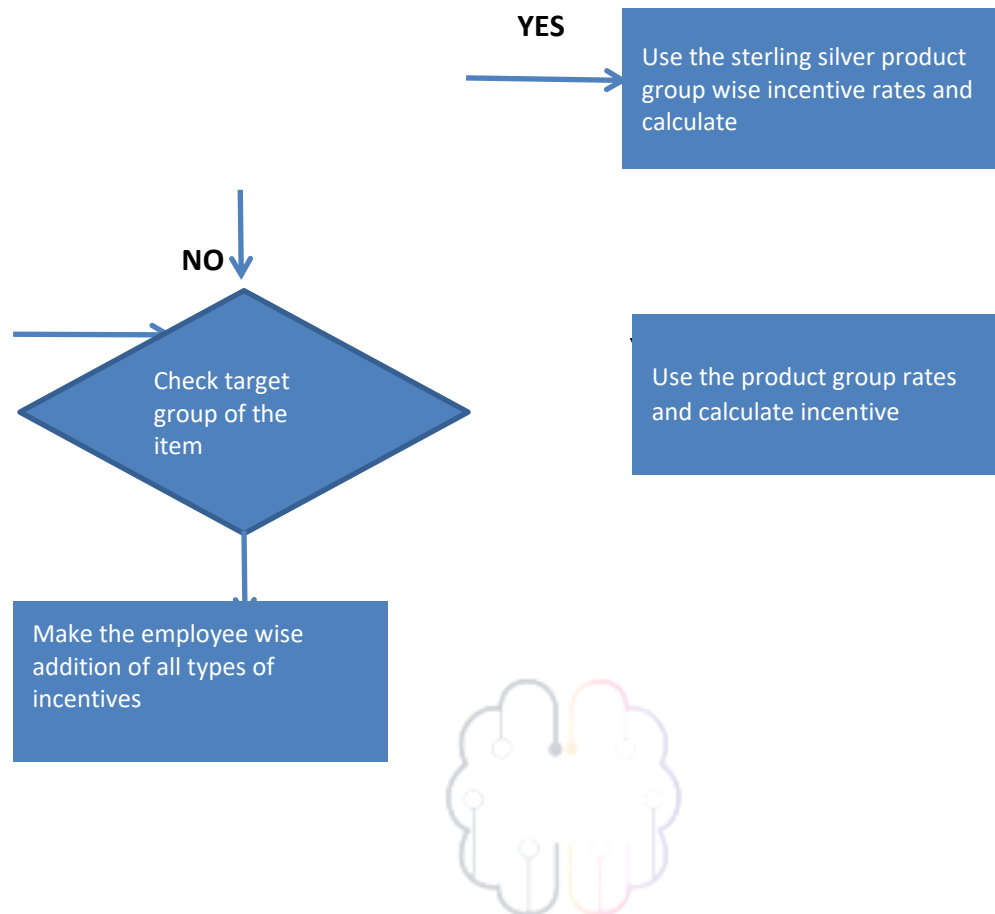
There was not any negative impact except minimum branch target. But now we have introduced 2 negative impacts as Non purchase customers and ticket size.

11. PROPOSED SYSTEM

BR001: Product Group wise Sales Incentive for Sales Employee

YES

Use the sterling silver product group wise incentive rates and calculate

NO

Check target group of the item

Use the product group rates and calculate incentive

Make the employee wise addition of all types of incentives

➢ **Create Master for Product Group wise Sales Incentive Rate**

Grade	GO	Diamond	SO	SS	Bhishi Additional	Gold small ornament
Rates On	Gm	CT	Gm	Gm	CT	Gm
A	4	400	1	5	50	10
B	3	300	0.70	3	50	8
C	2	200	0.50	2	50	6

● For the Sale Employee, Incentive generated based on grade. In case of Gold Ornament, Silver Ornament and sterling silver total of net wt sold is considered to calculate incentive.

● We will get product wise data from below path

Sales Incentive --> Sales Transaction ---> Select period, Branch and filter --> select target group wise counter and employee from the action buttons. -->You will get data for product/Target group wise employee wise targets and achievements.

OR

Sales Incentive --> Sales Transaction ---> Employee wise target setting --> Check Actual sale in Qty I.e Actual sale in Qty = Total sale in Qty - Sales Return Qty

Empwise Target Settings

Branch	Target Group	Employee ID	Employee Name	Grade	Counter	Period	Proposed Target QTY
ATHANI BRANCH	Silver Bullion	5127	Laxmi Vinaykumar Bhandole	B	SILVER ROTATION	2nd Half Year	789.44
ATHANI BRANCH	Silver O	5127	Laxmi Vinaykumar Bhandole	B	SILVER ROTATION	2nd Half Year	21314.78
ATHANI BRANCH	Silver Bullion	4709	Amol Aravind Payaprappa	B	SILVER ROTATION	2nd Half Year	789.44
ATHANI BRANCH	Silver O	4709	Amol Aravind Payaprappa	B	SILVER ROTATION	2nd Half Year	21314.78
ATHANI BRANCH	Silver Bullion	4082	Amit Tammanna Digraj	B	SILVER ROTATION	2nd Half Year	789.44
ATHANI BRANCH	Silver O	4082	Amit Tammanna Digraj	B	SILVER ROTATION	2nd Half Year	21314.78
ATHANI BRANCH	Silver Bullion	2708	Renuka Uday Kapadekar	C	SILVER ROTATION	2nd Half Year	631.69
ATHANI BRANCH	Silver O	2708	Renuka Uday Kapadekar	C	SILVER ROTATION	2nd Half Year	17055.67

Empwise Target Settings

Proposed Target rate	Proposed Target Amount	Revised Rate	Revised Target Amount	Total Sale in QTY	Total Sale in AMT	Sales Return QTY	Sales Return Amount
60.00	47366.4	77.150005066883	60905.3	1142.93	88227.96	0	0
70.00	1492034.6	84.389999802954	1798754.28	12245.14	1048291.95	868.67	78894
60.00	47366.4	77.150005066883	60905.3	2347.85	172896.54	0	0
70.00	1492034.6	84.389999802954	1798754.28	20126.33	1680437	530.01	44100
60.00	47366.4	77.150005066883	60905.3	2812.06	206859.6	0	0
70.00	1492034.6	84.389999802954	1798754.28	19962.43	1685304.13	654.04	52778
60.00	37901.4	77.149994459308	48734.88	1035.65	81544.6	0	0
70.00	1193896.9	84.389999923779	1439327.99	18790.86	1586559.79	1322.56	109041

Empwise Target Settings

get Amount	Revised Rate	Revised Target Amount	Total Sale in QTY	Total Sale in AMT	Sales Return QTY	Sales Return Amount	Actual Sale In QTY	Actual Sale In AMT
	77.150005066883	60905.3	1142.93	88227.96	0	0	1142.93	88227.96
	84.389999802954	1798754.28	12245.14	1048291.95	868.67	78894	11376.47	969397.95
	77.150005066883	60905.3	2347.85	172896.54	0	0	2347.85	172896.54
	84.389999802954	1798754.28	20126.33	1680437	530.01	44100	19596.32	1636337
	77.150005066883	60905.3	2812.06	206859.6	0	0	2812.06	206859.6
	84.389999802954	1798754.28	19962.43	1685304.13	654.04	52778	19308.39	1632526.13
	77.149994459308	48734.88	1035.65	81544.6	0	0	1035.65	81544.6
	84.389999923779	1439327.99	18790.86	1586559.79	1322.56	109041	17468.3	1477518.79

Explanation:

➢ In case of Gold O target group, incentive is dependent on the gm.

If a sales employee sold 1342.31 gm in Nov- 2023 period and grade is A, then he should get gold incentive 1342.31*4 = 5,369.24 Rs.

➢ Same calculation for Silver O

➢ In case of Diamond incentive 500 Rs per CT means he sold 3.62 CT, in NOV -2023 and grade is 'A' then 3.62 *500 = 1810 is the diamond incentive.

➢ In case of sterling silver product group, Sterling silver si para type is defined against item in the item master.

➢ Bhishi Additional Incentive is the bhishi linked diamond incentive, explained below BR002.

➢ In case of silver/gold small product, define product group wise small product in item master. Rates are defined in above chart.

➢ In case of start product, 180 days above from the labelling date is considered as star product. Rates are defined in the above chart.

➢ Club together all types of incentive as the final incentive.

Explanation: If the 1 Cr is revised target of sales Employee for a month and 10% to 12 % diamond business mix target (10 to 12 lakh) is achieved then

50 Rs per CT will be additional incentive. If the Sales Employee having "A" grade, then 500+50 = 550 will be additional incentive. Considering 1lakh per CT.
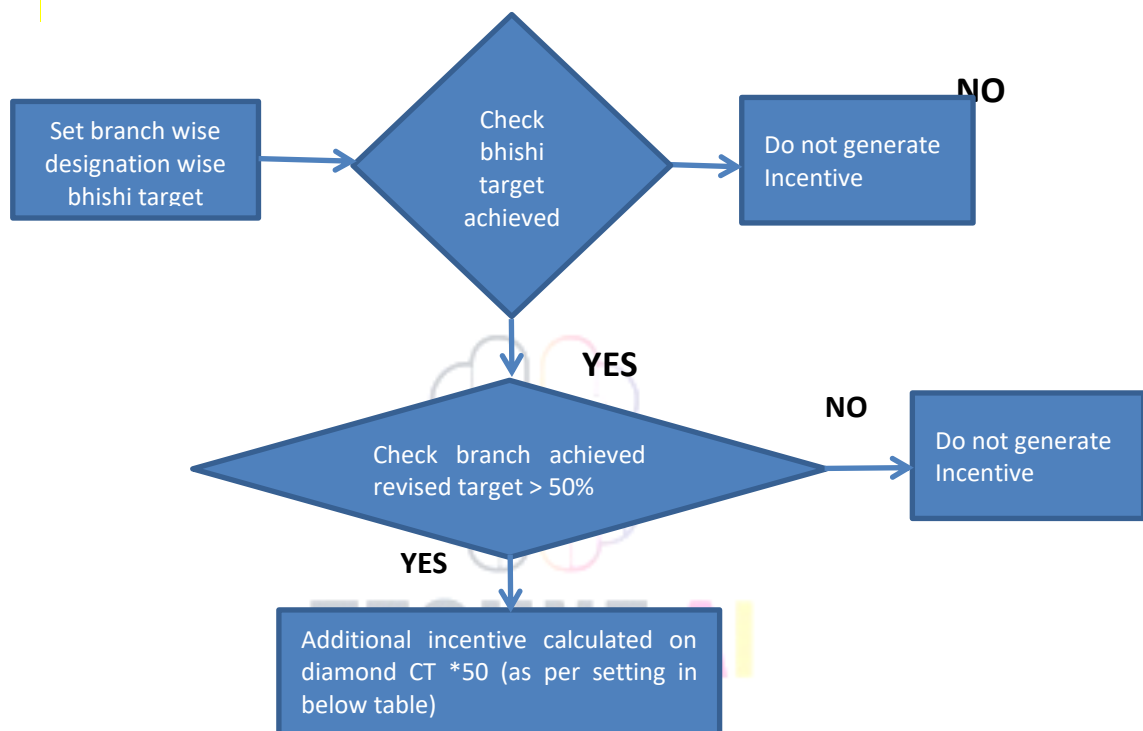
Condition

➢ Min 50% branch wise revised target and sales employee wise revised target excluding bullion should be achieved.

➢ Star Product = Above 180 days from labelling date

At the time of Incentive calculation, check the product labelling date is above 180 days. If it is star product then consider star product incentive rate (last column)

➢ Criteria to calculate star product incentive: Star product incentive is dependent on the proposed target (in term of net wt) of Gold O or Silver O. Two types of slabs are available below and above 9%.   Incentive rate is applicable on star product gms only.

Gold Star product slab % = sum (actual star product net wt)/proposed target GO

Silver Star product slab % = sum (actual star product net wt)/proposed target SO

	Gold Star Product	Gold Star Product	Silver Star Product	Silver Star Product
Grade	0.00-9.00 %	> 9.01%	0.00-9.00 %	>9.01%

A	4	10.00	1.00	1.50
B	3	8.00	0.70	1.00
C	2	6.00	0.50	0.60

BR002: Bhishi Linked Diamond Incentive

- Bhishi linked Diamond means to give additional incentive on diamond incentive per CT provided 100 % bhishi target is achieved.
- Bhishi achievement is dependent on the bhishi enrolment amount in a month. If the bhishi closed before 150 days from starting date, then it is prematurely closed. Prematurely closed bhishi amount will not be considered in bhishi target achievement. Prematurely closed bhishi amount will be deducted from the total enrolment amount, and it will be considered as bhishi target achievement.
- Below is the screen shot to set Bhishi target and rate to calculate bhishi linked diamond incentive.

🖸 Edit Bishi Target Setting

🖸 Back To List Data Bishi Target Setting

🖸 Edit Bishi Target Setting

Designation *	Sales Executive
Branch *	Pune Branch
Bishi Target *	50000.00
Bishi Rate *	50.00
Convention	2
Convention Incentive	700.00
Is Active *	⦿ Active ◯ Inactive

◯ Back   Save

●
● Following are the fields in bhishi Target Setting Master

FIELDS	INPUT TYPE	MANDATORY / OPTIONAL	DESCRIPTION
Designation	Drop Down	Mandatory	It will show designation from designation Master
Branch	Drop Down	Mandatory	It will show branch form Branch Master where incentive is applicable
Bhishi Target	Text	Mandatory	It is the employee wise, and designation wise bhishi target. Validation – It will accept only integers. Negative not allowed.
Diamond Rate	Text	Mandatory	It is the rate for Bhishi linked Diamond Incentive calculation. Validation – It will accept 2-digit decimal numbers. Negative not allowed.
Convention	Text	Optional	It shows convention number like in existing example 2 will be the value for this field. Validation – 0 and decimals not allowed
Convention Incentive	Text	Optional	It shows the convention Incentive rate amount. Fixed Rate is defined if the convention is satisfied.

Is Active	Radio Button	Optional	It shows if the record is active or not.

- You will get bhishi Details from below path

Sales Report --> Employee Reference Report --> Select from Date ---> Select To date Select Cluster ---> Select Schemes (All Scheme)

Premature closed bhishi amount will be removed from here, it is not working now. Depends on premature closed bhishi, target achieved will get find out.

Another option is to get details directly from the POS system - Padm.

Process: -

1. Download Close Report of " GTS ACCOUNT CLOSE REPORT - DA TEAM" from UDR
2. Download "Saving Scheme Redemption Voucher" from UDR.
3. Compare with last 6 Months Enrollment Data.
4. Find out data of below 150 days (about 5 months).
5. Remove redemption amount of premature closed bhishi in the same month of incentive. Finalize report.

Check the attachments, here test data is prepared
SI\Premature Bhishi closed.xls

● You will get Diamond target achievement from below path
Sales Incentive --> Sales Transaction --> Select Period --> Select Branch --->Filter
● ---> Select Target group as Diamond and Diamond Jewellery ---> Go to counter wise Target ---> Employee wise target action button ---> Here you will get Employee wise Diamond CT.

Empwise Target Settings

Action	Branch	Target Group	Employee ID	Employee Name	Grade	Counter	Period
	Pune Branch	Diamond	5020	Rajendra Dilip Mangrule	C	Gold Diamond Rotation P N	Nov-2023
	Pune Branch	Diamond	4302	Nikumbh Yogita Sachin	C	Gold Diamond Rotation P N	Nov-2023
	Pune Branch	Diamond	118	Vaishali Rajendra Kolaskar	C	Gold Diamond Rotation P N	Nov-2023
	Pune Branch	Diamond	5174	Akshay Dattaram Bahutule	B	Gold Diamond Rotation P N	Nov-2023
	Pune Branch	Diamond	4915	Tejashree Manoj Thorat	B	Gold Diamond Rotation P N	Nov-2023
	Pune Branch	Diamond	4873	Harshad Mohan Dongare	B	Gold Diamond Rotation P N	Nov-2023
	Pune Branch	Diamond	4563	Sagar Sharad Shahane	B	Gold Diamond Rotation P N	Nov-2023

Empwise Target Settings

Employee wise Diamond Target achievement in CT

:rate	Proposed Target Amount	Revised Rate	Revised Target Amount	Total Sale in QTY	Total Sale in AMT	Sales Return QTY	Sales Return Amount	Actual Sale In QTY
	831000	76495.710288809	847572.47	1.75	131990	0	0	1.75
	831000	76495.710288809	847572.47	8.81	672310	0.48	36000	8.81
	831000	76495.710288809	847572.47	13.18	1012660	0	0	13.18
	1038750	76495.709747292	1059465.58	4.98	375100	0	0	4.98
	1038750	76495.709747292	1059465.58	3.62	271500	0	0	3.62
	1038750	76495.709747292	1059465.58	8.92	695120	1.09	81750	8.92
	1038750	76495.709747292	1059465.58	4.19	321290	0.24	18000	4.19

● Example1: If Bhishi target is 50K and Diamond target is 10CT
● achieved Bhishi target is 50K. i.e 100% achieved. And achieved diamond target is 7CT then additional 50 RS per CT will add as the Bhishi linked Diamond incentive. 50*7 = 350 Bhishi linked Diamond incentive added.
● condition
   ■ Branch should achieve min 50% revised target for incentive payout.

■ Sales Employee should achieve min 50% revised target excluding gold and silver Bullion for incentive payout.

BR003: Bhishi 2 X conversion

Bhishi 2X conversion Target is dependent on bhishi redemption amount.

Bhishi redemption amount is the sum of installments paid at the time of matured bhishi closure. Once bhishi closed; need to be redeemed by buying some ornaments. It may be gold Ornament, Silver Ornaments, Diamonds or Diamond Jewellery or combination of it. Bullion will not be considered for target and achievement.

Then, salesperson for single bhishi will be multiple as per product groups sold against single bhishi. So, according to the item amount, gross amount and redemption amount/advance amount of a document, 2x calculation is performed.

Formula for 2 X calculation:

Advance adj/Gross Amount * amount in a particular bhishi sales bill document.

Bhishi Sales Bill Document – GTS Order Sales Bill and Kalpataru Order Sales Bill

Calculate employee wise sum of amount and sum of 2x calculation.

2x% = sum(amount)/sum (2x calculation)

If the 2x % is greater than 200% then 2X conversion incentive rate will be applicable to employee.

Date	Advance Adj.	Doc No	Branch Name	Document Master	Classi fication	Item	Amount	Gross Amount	Salesman	Advance Adj.	2x calculation
01-Jan-24	10000	JAKAR-686	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	M.MANI	3,048.00	10,796.00	4684 Swapnil Anil Katkar	10000	2823
01-Jan-24	10000	JAKAR-686	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	M.MANI	3,112.00	10,796.00	4684 Swapnil Anil Katkar	10000	2883
01-Jan-24	10000	JAKAR-686	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	M.MANI	3,112.00	10,796.00	4684 Swapnil Anil Katkar	10000	2883
01-Jan-24	10000	JAKAR-686	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	M.MANI	1,524.00	10,796.00	4684 Swapnil Anil Katkar	10000	1412
01-Jan-24	10000	JAKAR-687	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	CHAMKI (SMALL)	535.00	10,618.00	4684 Swapnil Anil Katkar	10000	504
01-Jan-24	10000	JAKAR-687	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	M.MANI	6,677.00	10,618.00	4684 Swapnil Anil Katkar	10000	6288
01-Jan-24	10000	JAKAR-687	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	M.MANI	3,406.00	10,618.00	4684 Swapnil Anil Katkar	10000	3208
01-Jan-24	20000	JAKAR-685	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	PADAK(K)	28,468.00	28,468.00	4684 Swapnil Anil Katkar	20000	20000
03-Jan-24	20000	JAKAR-701	KARAD BRANCH	GTS Order Sales bill	Gold Ornaments	CHAIN	27,620.00	27,620.00	4684 Swapnil Anil Katkar	20000	20000
01-Jan-24	25000	JAKAR-684	KARAD BRANCH	GTS Order Sales bill	Gold Orna	BOR MAL	33,393.00	33,393.00	4684 Swapnil Anil Katkar	25000	25000

					ments						
01-Ja n-24	2500 0	JAKAR -691	KARAD BRANCH	GTS Order Sales bill	Gold Orna ments	TOPS FANCY	31,99 7.00	31,99 7.00	4684 Swapnil Anil Katkar	25000	25000
01-Ja n-24	5000 0	JAKAR -690	KARAD BRANCH	GTS Order Sales bill	Gold Orna ments	CHAIN	67,49 6.00	67,49 6.00	4684 Swapnil Anil Katkar	50000	50000
11-Ja n-24	2500 0	JAKAR -740	KARAD BRANCH	GTS Order Sales bill	Gold Orna ments CHAIN		4094 8	4899 6	4684 Swapnil Anil Katkar	25000	20894
11-Ja n-24	2500 0	JAKAR -740	KARAD BRANCH	GTS Order Sales bill	Gold Orna ments	BADAM	8048	4899 6	4684 Swapnil Anil Katkar	25000	4106
25-Ja n-24	1000 00	JAKAK -121	KARAD BRANCH	Kalpataru Order Sales Bill	Gold Orna ments	GANTHAN (LONG)	3936 53	3936 53	4684 Swapnil Anil Katkar	100000	100000

Sum of amount by salesperson = 653037

Sum of 2X conversion by salesperson = 285000

Sum of amount / sum of 2X conversion = 653037/285000 = 229 %

Incentive = 700Rs

Below is the example of multiple sales person against single sales bill for 2x calc for single item.

Date	Doc No	Branch Name	Document Master	MAIN CLASSIFICATIO N	Customer	Item	Amo unt	Gross Amoun t	Advanc te Adj.	2x calculatio n
29-Jan- 24	JAGAR-1 201	Sangli Branch	GTS Order Sales bill	Gold Ornaments	JAMADAR SULTAN JALIL	M.MANI	6347	16410	10000	3868
29-Jan- 24	JAGAR-1 201	Sangli Branch	GTS Order Sales bill	Gold Ornaments	JAMADAR SULTAN JALIL	M.MANI	3237	16410	10000	1973
29-Jan- 24	JAGAR-1 201	Sangli Branch	GTS Order Sales bill	Silver	JAMADAR SULTAN JALIL	PAYAL (WT) - SIL	6524	16410	10000	3976
29-Jan- 24	JAGAR-1 201	Sangli Branch	GTS Order Sales bill	Silver	JAMADAR SULTAN JALIL	BICHAVE-S IL	302	16410	10000	184

Check employee wise bhishi closed in a month (except prematurely closed bhishi) → Check the redemption amount of bhishi (except bullion) → Check the sale asscociated with bhishi in padm

Check for branch revised target >50% and sales person target >50%

Set the bhishi 2X conversion target on bhishi redemption amount

Check Target Vs Sale 100 % achieved

Pay incentive as "bhishi 2X conversion" 700Rs

==**Setting screen shot is shown below in Bhishi Target Setting**==

==**If the 2X conversion target achieved, then salesperson will be eligible for 2X conversion incentive with above incentive rate.**==
==**Explanation is given below.**==

Bhishi Redemption amount is the ==total installments amount paid of closed bhishi== in a month

==Do not consider Gold Bullion/Silver Bullion redemption sale in target and achievement.==

● We will get Employee wise redemption amount to check Bhishi Target achievement from below path

Check the attachment --------

1. Download padm UDR report - UDR - SALES REGISTER RCD-Mobile No. 1 updated_08_12_2023 11_17_42
2. Perform 2X target calculation based on Item amount of GTS Order sales bill and Kalpataru Order Sales Bill
3. You will get data of Salesperson wise 2 x conversion achievement for a month.
4. If the achievement is 200% or more then he will be eligible for bhishi 2X conversion incentive I.e 700 rs.
5. Redemption bhishi Bhishi Redemption data.xlsxTest data given in below file

● Explained in below example

Example1:

Suppose 3 customers closed bhishi of 1lakh each then

Gold O = redemption 1 lakh (sale 3 lakh)

Gold Bullion =redemption 1 Lakh (sale 2 lakh)

Diamond = redemption 1 Lakh then (Sales 2lakh)

2 lakh redemption except bullion so 2x conversion is ==4 lakhs will be targeting== amount and ==5 lakhs will be achieved target amount.== I.e 100 % achievement so

Additional incentive will be ==700 (fixed amount)== if target achieved.

If less than 100% achievement is there then, incentive will not get to sales employee.

Example 2

Suppose an employee, redeemed bhishi of 10 lakh amount and 2 lakh bullion

Then 8 lakhs *2(2X conversion) = 16 lakh will be target amount

If 16 lakh target amount is achieved (100% target achieved, then only) in 700 will be additional incentive amount.

In the existing System:

Slab wise and grade wise incentive setting was done in **Designation wise grade wise Incentive setting menu** but now we are doing incentive on 100 % achievement of bhishi target.

Currently system showing branch wise Bhishi 2X conversion Target Amount and Bhishi 2X conversion Achieved Amount. Instead of that show sales employee wise targets and achievement

- condition
  - Branch should achieve min 50% revised target for incentive payout.
  - Sales Employee should achieve min 50% revised target excluding gold and silver Bullion for incentive payout.

● **Create a View/Report to check employee wise Designation wise Bhishi redemption Target and applicable 2X conversion incentive**

➢ Filters
   ■ Period: Period Master
   ■ Branch: Branch Master where incentive applicable is 'YES'
   ■ Cluster: Branch Master cluster

Field Name	Fetched From	Description
Branch	Selected in Filter	Display branch, which is selected in the filter.
Period	Selected in Filter	Display Period, which is selected in the filter.
Cluster	Selected in Filter	Display Cluster, which is selected in the filter.
Employee ID	Fetched from Employee Master	It is the list of employee Ids of selected branch having designation as 'sales Executive'.
Employee Name	Fetched from Employee Master	It is the Name of employee of selected branch having designation as 'sales Executive'.
Designation	Fetched from Employee Master	Show designation of employee.
Bhishi Redemption Target	It is calculated, based on bhishi redemption amount	Calculation shown above in explanation
Bhishi 2X conversion incentive	Fetched from bhishi Target Setting	It is the target set for branch wise designation wise
Bhishi 2X conversion incentive amt	Calculated	If the target achieved, then employee will get full incentive amount else not.

BR004: Business Mix

```
┌──────────────────────┐     ┌──────────────────────┐     ┌──────────────────────┐
│ Check Branch wise    │     │ Check slab wise      │     │ Calculate incentive  │
│ Overall actual sale  │ ──▶ │ Branch wise Diamond  │ ──▶ │ on diamond sold CT   │
│ (sale-sales return)  │     │ sale (I.e. Diamond   │     │ according to slab    │
│ out of revised target│     │ Business Mix)        │     │ (2nd column)         │
└──────────────────────┘     └──────────────────────┘     └──────────────────────┘
           │                                                          │
           ▼                                                          │
┌──────────────────────┐     ┌──────────────────────┐                │
│ Check slab wise      │     │ Calculate incentive  │                │
│ Branch wise Sterling │ ──▶ │ on Sterling silver   │                │
│ Silver sale          │     │ sold Gm according to │                │
│ (I.e. Sterling Silver│     │ slab(2nd column)     │                │
│ Business Mix)        │     │                      │──┐             │
└──────────────────────┘     └──────────────────────┘  │             │
                                                        ▼             ▼
```

Check conditions given below if satisfied then pay incentive

Business mix is the term used to check how much diamond OR sterling silver actual sale (sales - sales Return) done out of overall branch wise proposed/revised target amount. Slab wise diamond business mix or sterling silver mix additional incentive rates are defined in below table.

Diamond Business Mix Calculation:

Employee wise sum of Proposed Target of all product groups like GO, SO, GB, SB, D, DJ, Stone = A

We have to derive 10% of all proposed target in CT i.e

A*10%/ (sales rate of 10gm DJ+ Diamond sales Rate) = B CT

Note- Sales rate defined in the Group master setting master > planned rate of group

Diamond achievement in CT by Salesperson = sum of actual sale in qty in CT = C

Diamond Business Mix % = C*10/B

New setting Employee Diamond Business Mix: employee wise DJ+D Actual Sale Amount/emp wise Sum of all Proposed Target amount%.

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Sterling Silver Business Mix Calculation:

Sterling Silver Actual Sale Amount/Sum of proposed Target amount of SB and SO and SS%.

Create master to Set Diamond Mix and sterling silver Mix rates
Master: Extra SI Setting Master

Diamond/ Sterling Mix	Diamond Incentive Additional Rates	Sterling Silver Incentive Additional Rates	Designation
Calculate On	Diamond CT	Sterling silver gm	
0.00 to 9.99%	0	0	Sales Executive/ Silver Sales Executive
10.00 to 11.99%	50	0.50	Sales Executive/ Silver Sales Executive
12.00 to 14.99%	100	1	Sales Executive/ Silver Sales Executive
15.00 to	200	2	Sales Executive/ Silver

16.99%			Sales Executive
17.00 to 19.99%	300	3	Sales Executive/ Silver Sales Executive
20.00 to 24.99%	400	4	Sales Executive/ Silver Sales Executive
Above 25 %	500	5	Sales Executive/ Silver Sales Executive

Extra SI Setting Master ● Add Data

Action	Setting Name ⇕	Description ⇕	Branch ⇕	Designation ⇕	Grade ⇕	Incentive Type ⇕
Slab ✎	Diamond Business Mix	Diamond Business Mix		Sales Executive	B	S
Slab ✎	Diamond Business Mix	Diamond Business Mix		Sales Executive	A	S
Slab ✎	incentive rate for Cm on diamond rngs		Pune Branch	Cluster Manager	NA	S
Slab ✎	Star Product	Star Product		Sales Executive	C	S
Slab ✎	Star Product	Star Product		Sales Executive	B	S
Slab ✎	Star Product	Star Product		Sales Executive	A	S

On click of the slab action button, slab against scheme gets visible

Extra Incentive Settings Detail ● Add Data   🏠 Home > Extra Incentive Settings D

◀ Back To List Data Slab

≡ Slab

Setting Name	Star Product

☑ Bulk Actions ▾   Search 🔍 20

Action	☐	Si Extra Incentive Setting Id ⇕	From Percent ⇕	To Percent ⇕	Additional Rates ⇕	Is Active ⇕	Remark ⇕
✎ 🗑	☐	1	9.01	99.99	10	Y	
✎ 🗑	☐	1	0	9	4	Y	

➢ ==For the calculation of diamond Business Mix consider overall branch proposed target vs Diamond and Diamond Jewellery actual sale.==

➢ ==For the calculation of sterling silver business mix consider only silver Ornament, Silver Bullion and sterling silver. Vs sterling silver sale==

➢ Example: For a particular Branch proposed target amount is 1 Cr. Out of that 80 lakh is gold sale considering gold jewellery and Gold Bullion. 10 lakh is the Diamond sale considering diamond jewellery and diamond. And 10 lakh is other, then 10 lakh is the diamond business mix. In terms of percentage ==10% is diamond business mix.==

==Suppose 5 lakh sterling is included in it then 5% is the sterling silver business mix==

In the above example 10% is the Diamond business mix and 5% is the sterling Business Mix. According to below slab setting 50Rs per CT will be additional incentive.

==Sterling silver business mix will be calculated based on slab wise Rs per gm of sterling silver.==

Note: SS Mix = Sterling Silver Mix

- **Conditions:**
  - Branch wise revised target achievement should be above 50%.
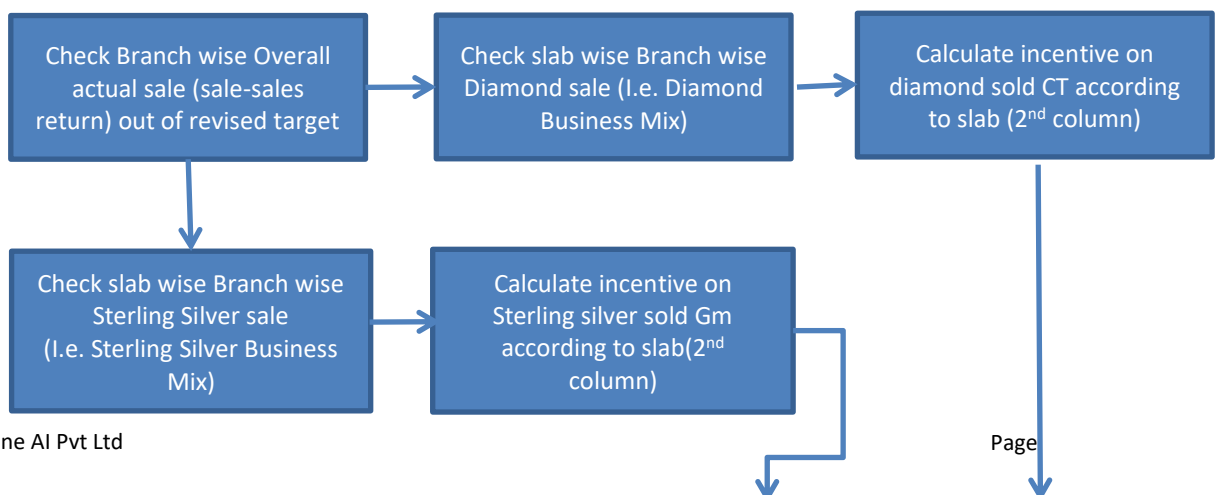 - Sales Employee should achieve min 50% revised target excluding gold and silver Bullion for incentive payout.
  - Branch wise Diamond Mix achievement out of proposed target of branch should be above 10% for diamond mix additional incentive.
  - Individual wise Diamond Mix achievement out of proposed target of individual target should be above 10% for diamond mix additional incentive.
  - Branch wise Sterling Silver Mix target should be above 10% for Sterling Silver mix additional incentive.
  - Individual wise Sterling Silver Mix target should be above 10% for Sterling Silver mix additional incentive.

Below is the scenario to generate Diamond Business Mix Incentive

1.

Branch Target Above 10 % Business Mix				
	A	**Proposed Target**	**Achievement**	**%**
Total Target	1000			
Diamond	200	20	15	15%
Gold	800	80	80	80%
		100	95	95%

Employee achieved above 10% slab & branch also achieved 10% slab So, Emp will get Incentive

2.

Branch Below 10 % Business Mix				
	B	**Proposed Target**	**Achievement**	**%**
Total Target	1000			
Diamond	90	9	9	9.0%
Gold	910	91	91	91.0%
		100	100	100%

Employee not achieved 10% slab & branch achieved 10% slab So, Emp will not get Incentive

3.

Branch Above 10 % Business Mix				
	C	**Proposed Target**	**Achievement**	**%**
Total Target	1000			
Diamond	90	9	15	15.0%
Gold	910	91	85	85.0%

		100	100	100%

Employee achieved above 10% slab & branch achieved 10% slab So, Emp will get Incentive

4.

Branch below 10 % Business Mix				
	C1	Proposed Target	Achievement	%
Total Target	1000			
Diamond	90	9	15	15.0%
Gold	910	91	95	95.0%
		100	110	110%

Employee achieved above 10% slab & branch not achieved 10% slab So, Emp will not get Incentive

BR005: Incentive Rate for CM, BM, OM, FM Employee on Diamond Mix

Create a master to set Diamond Business Mix Incentive rates for operational emp
We can merge both master's for sales executive and other operational staff.
     In this case Branch proposed target will be applicable for above roles.

Diamond Mix	Diamond Incentive Additional Rates			
Diamond Mix	CM	BM	OM	FM
0.00 to 9.99%	0	0	0	0
10.01 to 11.99%	10	20	15	10
12.00 to 14.99%	15	30	20	15
15.00 to 16.99%	30	60	40	30
17.00 to 19.99%	45	90	65	45
20.00 to 24.99%	60	120	85	60
Above 25 %	75	150	105	75

For sterling Silver Business Mix not applicable for **CM, BM, OM, FM**
Conditions:
1.   Branch wise revised target achievement should be above 50%.
2.   Branch wise Diamond Mix achievement out of proposed target of branch should be above 10% for diamond mix additional incentive.

BR006 Slab wise Regular bhishi Incentive

MONTHLY REGULAR BHISHI INCENTIVE SLAB:-

Monthly Bhishi Slab Amount :-	Pay Out %
Up to 30,000	0.00%
30,001 to 50,000	1.00%
50,001 to 90,000	1.25%
90,001 to 1,50,000	1.50%
1,50,001 & Above	2.00%

In the existing system, we have provision to set bhishi incentive slab, just need to change the slab according to requirement.

Also correct a bug that it includes premature bhishi data also, do not consider premature bhishi amount

Condition 50% branch revised target achievement condition is not applicable here.

BR007: Negative Impact on Sales Incentive

Upon fully generation of incentive payout, there are few negative impacts on it if any of the following not achieved then it will deduct 5 % from overall incentive except bhishi incentive

- Non purchase Customers
- Ticket Size

■ Non purchase Customer:

In the PRO system, Sales employee tracks visitors' data. Min 88% customers should be converted to purchase. Otherwise, 5% employee wise incentive will be deducted.

Example: 1000 is the branch wise visitors count, visitors count mapped with customer in PRO system, suppose each employee mapped with 100 visitors then each employee should convert 88 % i.e 88 visitors into customer. Then only sales employee will get full incentive otherwise 5% overall salesperson wise incentive will be deducted.

Note: Do not consider bhishi installment, URD, ------------------------ customer for non-purchase customers %

■ Ticket Size:

Ticket size is the negative impact on incentive amount of Salesperson and branch

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

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

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

For the calculation of branch wise ticket size consider, overall branch wise product group wise net wt/ amount and unique customer count of branch.

For the calculation of Employee wise ticket size consider, salesman wise product group wise net wt/ amount and unique customer count of sales emp.

Unique customers defined by the mobile number.

510 net wt /85 = 6 gm is the ticket size for gold ornament, silver ornament,

500000 amount /50 = 50000 is the ticket size for diamond +diamond Jewellery.

Do not consider small ornament in the ticket size

Create a Master for Ticket Size Target setting – Ticket Size Master Target Setting

FIELDS	INPUT TYPE	MANDATORY/ OPTIONAL	DESCRIPTION
Period Name	Drop Down	Mandatory	It shows the name of the period from period master with descending order.
Branch Name	Drop Down	Optional	It shows name of the branch from branch master. Active and incentive applicable branches will be visible only. If not selected applicable to all branches
Designation	Drop Down	Mandatory	It shows the list of designations which are active.
Product group	Multi select Drop Down	Mandatory	It shows the Target product group from group Master setting. Multiple target groups can be selected.
Ticket size Target	Text	Mandatory	It shows the target for ticket size. It will accept 2-digit decimal value
Impact %	Text	Mandatory	It shows the % to deduct from total incentive if the ticket size target is not achieved.

Master Example -

Period Name	Branch Name	Product Group	Designation	Ticket Size Target	Impact %
Oct-24	Pune Branch	Diamond Jewellery + Diamond	Sales Executive	25000	2.5
Oct-24	Pune Branch	Gold O	Sales Executive	50	2.5

Oct-24	Pune Branch	Silver O	Silver Sales Executive	75	5

Branch wise Ticket Size Report

Branch Name	Product Group	Period	Day Wise Unique Customer (A)	Achievement (B)	Target	Ticket Size (B/A)	%
Branch Master		Period Master	It is	Sales in netwt/amount	Assigned target	B/A	Ticket size/target
Pune Branch	Diamond Jewellery	Feb-24	11992	455803958	Fetch from master	38,009	
Pune Branch	Gold O	Feb-24	150	1000	Fetch from master	6.67	
Pune Branch	Silver O	Feb-24	6310	224199	Fetch from master	35.53	

Employee wise Ticket size Report

Employee Name	Branch Name	Product Group	Month	Day Wise Unique Customer (A)	Achievement (B)	Target (B)	Ticket Size (B/A)	% Ticket size/ target
E1	Pune Branch	Diamond Jewellery	Oct	11992	455803958	Fetch from above master	38,009	
E2	Pune Branch	Gold O	Oct	150	1000	Fetch from above master	6.67	
E3	Chinchwad Branch	Silver O	Oct	6310	224199	Fetch from above master	35.53	

If any of the above not achieved, then 5 % <configurable> incentive will be deducted
Note: Including Bhishi target.

If both not achieved, then 10 % will be negative impact on incentive generation.

BR008: Employee wise SIP Detail Report – Period wise Target wise Achievement Report
Filter - Cluster, Branch (multi select), Period (multi select), Employee ID (multi select), Employee Name (multi select)

Sr No	FIELD TYPE Front / In Detail View	FIELD NAME	DESCRIPTION
1	Summery	CLUSTER	Name of the Cluster
2	Summery	BRANCH NAME	Name of the Branch
3	Summery	Period Name	Name of the Period of Incentive.
4	Summery	EMP NAME	Name of the Employee of selected branch
5	Summery	EMP ID	Employee ID of the employee
6	Summery	GRADE	Grade of the Employee
7	Summery	DESIGNATION	Designation of the employee
8	Summery	OVERALL INCENTIVE AMOUNT	It is the addition of all incentives like Product group wise incentive, bhishi linked Diamond Incentive, Diamond Business Mix, sterling silver Business Mix, Bhishi Incentive
9	Summery	BRANCH ACHIVEMENT%	Branch Achievement %
10	In Detail	BRANCH DIAMOND BUSINESS MIX%	Branch Diamond Mix %
11	In Detail	BRANCH SS BUSINESS MIX%	Branch SS Business Mix %
12	Summery	EMP OVERALL TARGET	Addition of Revised Target amount for all product group excluding gold and silver Bullion.
13	Summery	EMP OVERALL ACHIVEMENT	Addition of Actual Sale amount for all product group excluding gold and silver Bullion.
14	Summery	EMP OVERALL ACH %	(13/12%) Revised target Amt Vs Actual Sale in Amt %
15	In Detail	GOLD O TARGET	Proposed Target Qty of Gold O
16	In Detail	GOLD O ACHIVEMENT	Gold O Actual Sale in Qty excluding small product, star product
17	In Detail	GOLD O ACHIEVEMENT %	(16/15%) I.e Gold O Actual Sale in

			Qty excluding small product, star product /GOLD O TARGET %
18	In Detail	GOLD O INCENTIVE AMT	Calculate Gold O incentive amount on grade wise rate
19	In Detail	DIAMOND CARAT TARGET	Employee wise Diamond CT target from employee wise target setting.
20	In Detail	DIAMOND CARAT ACHIEVEMENT	Employee wise Diamond CT achievement from employee wise target setting.
21	In Detail	DIAMOND INCENTIVE AMT	Product group wise incentive for Diamond group will be added here.
22	In Detail	SILVER O TGT	Proposed Target Qty of Silver O target group.
23	In Detail	SILVER O ACHIVEMENT	Silver Ornaments rate group Actual Sale in Qty
24	In Detail	SILVER O ACHIVEMENT%	(23/22%) I.e Silver O Actual Sale in Qty excluding small product, star product /Silver O TARGET %
24	In Detail	SILVER O INCENTIVE AMT	Product group wise incentive for silver group will be added here.
25	In Detail	STERLING SILVER TARGET	It is the 10% of silver O and Silver Bullion Revised Target amount.
26	In Detail	STERLING SILVER ACH	Identify sterling silver item and add achievement in terms of SS net wt.
28	In Detail	STERLING SILVER INCENTIVE AMT	Calculate incentive amount for SS based on rate and grade
29	In Detail	GOLD SMALL ORNAMENTS SALE	Net wt for gold small ornaments
30	In Detail	GOLD SMALL ORNAMENTS INCENTIVE	Incentive amount for Gold small ornament
31	In Detail	STAR PRODUCT GOLD O SALE	Net Wt of Gold Star product group
32	In Detail	STAR PRODUCT GOLD O INCENTIVE	Incentive amount for gold star ornament
33	In Detail	STAR PRODUCT SILVER O SALE	Net Wt of silver Star product group
34	In Detail	STAR PRODUCT SILVER O INCENTIVE	Incentive amount for silver star ornament
35	In Detail	BHISHI LINK DIAMOND INCENTIVE	Employee wise Bhishi Linked Diamond Incentive amount
36	In Detail	bhishi target	It is the target of bhishi, set against employee.
37	In Detail	bhishi achievement	It is bhishi enrolled achievement amount of matured bhishi.
38	In Detail	bhishi regular incentive as	According to bhishi achievement

		per slab	and slab payout, Calculate employee wise regular bhishi incentive.
39	In Detail	bhishi 2x target	Calculated based on redemption sale bill excluding bullion
40	In Detail	bhishi 2x ach	Amount of Sale bills exclude bullion
41	In Detail	Bhishi Scheme Qty	No of bhishi (count) by salesperson
43	In Detail	Prematurely closed bhishi count	Employee wise Prematurely closed bhishi count
44	In Detail	bhishi 2x ach%	40/39% I.e bhishi 2X ach / bhishi 2X target %
45	In detail	Bhishi 2x incentive amount	2X conversion amount
46	In Detail	Emp wise Diamond Business Mix %	Add this column after branch wise DBM %.
47	In Detail	Diamond Business Mix Incentive	employee wise DJ+D Actual Sale Amount/emp wise Sum of all Proposed Target amount%.
48	In Detail	Emp wise Sterling Silver Business Mix %	Add this column after branch wise Sterling Silver BM %.
49	In Detail	Sterling Silver Business Mix Incentive	Sterling Silver Actual Sale Amount/Sum of proposed Target amount of SB and SO and SS%.
50	Summery	Overall Incentive Amount	gold_o_incentive_amount + diamond_incentive_amount+ silver_o_incentive_amount+ sterling_silver_incentive_amount + gold_small_ornaments_incentive + star_product_gold_o_incentive+ Diamond BM Incentive+ Sterling Silver BM Incentive+ bhishi_linked_diamond_incentive + bhishi 2X conversion bhishi_regular_incentive_as_per_slab
51	Summery	Subtotal Incentive	gold_o_incentive_amount + diamond_incentive_amount+ silver_o_incentive_amount+ sterling_silver_incentive_amount +

			gold_small_ornaments_incentive + star_product_gold_o_incentive+ Diamond BM Incentive+ Sterling Silver BM Incentive+ bhishi_linked_diamond_incentive + bhishi_regular_incentive_as_per_ slab
52	In Detail	Gold O Ticket Size Deduction	If branch wise Gold O Ticket size target > emp wise Gold O ticket size achievement, then subtotal Incentive Amount * GOld O impact % else 0
53	In Detail	Silver O Ticket Size Deduction	If branch wise Silver O Ticket size target > emp wise Silver O ticket size achievement, then subtotal Incentive Amount * Silver O impact % else 0
54	In Detail	Diamond Ticket Size Deduction	If branch wise D+DJ Ticket size target > emp wise D+DJ ticket size achievement, then subtotal Incentive Amount * D+DJ impact % else 0
55	Summery	Incentive payout	Overall Incentive Amount -bhishi_regular_incentive_as_per _slab - (Gold O ticket size deduction + Silver O Ticket Size Deduction +Diamond+DJ Ticket Size Deduction)

==Make a functionality to export the report in proper format.==
==This report will reflect Sales Employee wise day wise incentive amount, achievement details, so that user will get data on specific date==

12. REFERENCES OF THE USERS

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