

19-03-2024



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1. **TICKET DETAILS**

|  |  |
| --- | --- |
| **Ticket ID** | TT18548 |
| **Ticket description** | MY CS APP Dashboard |
| **Created by** | Vikram Kadre |
| **Created on** |  |
| **Priority**  | Medium |

1. **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** |
|  |  |  |  |  |

1. **APPROVALS**

|  |  |  |
| --- | --- | --- |
| **Field** | **Name of the User** | **Approved date by the user** |
| **Actual Username****Actual User** **Department****Organization Name** | Vikram KadreData AnalystCSPL |  |
| **Assigned BA** | Priyanka Gole |  |
| **Assigned Developer** | Mustafa siyam |  |
| **Assigned Tester** | Amruta Kore |  |
| **Assigned UI/UX Designer** | Prajakta Gosavi |  |

1. **ESTIMATION**

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

1. **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.

1. **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 |
| BR004 | In detail Product group bifurcation. | New chart will get open on click of product groups like Gold O, Gold Star Product, Gold Small Product. | High |
| BR005 | Spiral Graph according to designation | According to the designation of employee, he will view incentive figures. | High |
| BR006 | Branch Level graph | In addition to salesperson incentive details, he can view branch performance with details | High |
| BR007 | Speedo Meter | Salesperson can view progress with respect to relevant scheme. | High |

1. **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.

1. **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.
1. **ABBREVIATIONS & TERMS**

Sales Incentive - SI

1. **EXISTING SYSTEM**

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

1. **GRAPHICAL REPRESENTATION**

<https://www.figma.com/proto/8HO7QneTD8ZeUhGX0394HT/My-CS-app?type=design&node-id=276-4601&t=lX1PioPAoZX4fhCE-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 Incentive <last synced date (for the date) incentive amount> generated. 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 | **It will show last synced date incentive** |
| Till Date Incentive | Label | NO | 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.In the case of previous month, the till date incentive will display the total incentive. |
| Projected Incentive | Label | NO | 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”.In the case of previous month, the projected incentive will not appear. |
| Gold O | Button | NO | On click of the Button, Gold O product group wise incentive details will be visible. It will be clickable for **sales Executive designation only.** System will throw message as “no data found”. |
| Diamond | Button | NO | On click of the Button, Diamond product group wise incentive details will be visible.It will be clickable for **sales Executive designation only.** For rest designation, system will throw message as “no data found” It will be clickable for **Silver sales Executive designation only.** For rest designation, system will throw message as “no data found”, if no data available. |
| Silver O | Button | NO | On click of the Button, silver O product group wise incentive details will be visible. It will be clickable for **Silver sales Executive designation only.** For rest designation, system will throw message as “no data found”, if no data available. |
| Scheme | Button | NO | On click of the Button, scheme related incentive details will be visible. GDP is the name of the bhishi scheme, in future it may change. Accordingly, the name of the tab will change.**It is common for all designations who worked on scheme.** |
| Performance meter | Button | NO | On click of the Button, employee wise performance level will be visible. On click of each block's performance will vary.**It is common for all designations like sales executive and silver sales Executive.** |
| Branch Level Performance | Button | NO | On click of the Button, Branch wise all the incentive achieved % will be visible.It will show data of logged in users branch only irrespective of designation. |

**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** | **INPUT TYPE**  | **IS EDITABLE** | **WEB BASED FIELD** | **DESCRIPTION** |
| Employee Overall % | Sales Executive | Label | NO | Employee Overall Ach % |  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.**Formula** – employee wise Sum of actual sale amount/ employee wise Sum of Revised Target amount% |
| Gold O achievement % | Sales Executive | Label | NO | Gold O achievement % | It will show gold O product group's achievement % in a month. **Formula –** employee wise Sum of actual sale in Gold Ornaments rate group qty /Sum of Proposed Target qty of Gold O% |
| Diamond Achievement % | Sales Executive | Label | NO | Diamond achievement/ Diamond carat proposed target %. | It will show employee wise Diamond product group's achievement % in a month. **Formula** - employee wise Sum of actual sale qty of Diamond / employee wise Sum of Proposed Target qty of Diamond/ % |
| Diamond Business Mix % | Sales Executive | Label | NO | **DJ+D Actual Sale Amount / Sum of Proposed Target amount of an employee**  | 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.**Formula** – Emp wise sum of actual sale amount of DJ and D /Emp wise Sum of Proposed Target amount of all product group % |
| Star Product % | Sales Executive | Label | NO | (Actual star product sale – sales return)/Employee wise Gold O proposed target | **Formula -** (employee wise star product actual sale) / Employee wise sum of Gold O proposed target amount %  |
| Silver O achievement % | Silver Sales Executive | Label | NO | Silver O achievement % | It will show Silver O product group's achievement % in a month. **Formula** - Employee wise Actual sale of Silver Ornaments rate group qty / Employee wise Proposed Target qty of Silver O% |
| Stearling Silver Achievement % | Silver Sales Executive | Label | NO | Stearling Silver Achievement % | **Formula -** sterling silver actual sale qty / Employee wise sterling silver Proposed target amount |
| Stearling Silver Business Mix % | Silver Sales Executive | Label | NO | Stearling Silver Business Mix % | **Formula -** Sterling silver actual sale amount / sum of proposed target amount of silver O, silver Bullion, Sterling silver% |
| Star Product % | Silver Sales Executive | Label | NO |  | Silver Star product actual sale amount /Sum of proposed target amount of silver O%Silver star product = difference in sale bill date and labelling date >180 days  |

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

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **FIELDS** | **DESIGNATION** | **INPUT TYPE**  | **IS EDITABLE** | **WEB BASED FIELD** | **DESCRIPTION** |
| Branch Overall % | Sales Executive/ silver Executive | Label | NO | Branch Overall Ach % | It will show Branch-wise overall (Gold O, Silver O, Diamond, Diamond Jewellery, Sterling Silver, Stone) % achieved in a month with discount **Formula** – Sum of actual sale amount / Sum of Revised Target amount % |
| Diamond Business Mix % | Sales Executive | Label | NO | Diamond Business Mix % | **Formula** -sum of the D+DJ actual amount / Proposed target amount of all product group. |
|  SS Business Mix% | Silver Sales Executive | Label | NO | Gold O achievement % | It will show gold O product group's achievement % in a month. **Formula** - Sum of actual sale qty /Sum of Proposed Target qty of Gold O% |
| Gold O Star Product% | Sales Executive | Label | NO | Gold O achievement % | It will show Star Product gold O achievement % in a month. **Formula** - Sum of actual sale Gold O star product net wt / Sum of Proposed Target qty of Gold O% |
| Silver O Star Product% | Silver Sales Executive | Label | NO | Gold O achievement % | It will show gold O product group's achievement % in a month. **Formula** - Sum of actual sale of Silver O star product net wt/ Sum of Proposed Target qty of Gold O% |

**BR005: Speedo Meter Incentive Logic**

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

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Logic** | **Description** | **Web Based Field** | **Benchmark** | **Poor**  | **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** | **>2.1** |
| Pre-mature | It shows % of prematurely closed bhishi . **Formula:**  | Not available | 5 | >7% | 5-7% | <4.9% |
| Re-enrollment | It shows % of customers who enrolled bhishi after closing bhishi.**Formula:** | Not available | 50% | <25% | 25-50% | >51% |
| Bill to GDP | It shows the number of unique customers per day % against no of new enrollment bhishi. **Formula:** | Not available | 18% | <12% | 12-18% | >18.1% |
| Scheme Achievement | It shows bhishi enrollment amount of a salesperson in a month.  | bhishi\_achievement | 50000 | <50000 | 50000-100000 | >100001 |
| Ticket Size Gold | It shows achievement of ticket size Gold out of ticket size target | Gold product group Ticket size % |  | <95% | 95-105% | >105.1% |
| Ticket Size Diamond | It shows achievement of ticket size Diamond out of ticket size target | Diamond,DJ product group Ticket size % |  | <95% | 95-105% | >105.1% |
| Ticket Size Silver | It shows achievement of ticket size Silver out of ticket size target | Silver product group Ticket size % |  | <95% | 95-105% | >105.1% |

1. **2X conversion**

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

1. **Bhishi Premature**

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

1. **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.

1. **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.

1. **Scheme Achievement**

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

1. **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.

1. **Ticket Size Diamond**

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

1. **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

1. **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.



1. **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 |  |  |  |
|  |  |  |  |  |

1. **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**  |  |  |  |