



# Project Requirements Summary

## System 1: Harry's Group (Client-Based Fixed Rates)

### How It Works

- User selects a **Client** from a predefined list:
  - Ameristar
  - Janus
  - Confidence
  - Crescent
  - Medallion HC
  - Metropolitan
- Each client has **pre-defined agents**
- Each agent is paid using **fixed dollar rates per plan type**
- **No tier system** is used
- Commission calculation is simple multiplication:

Employee Count × Fixed Rate

### Example

**Client:** Confidence

- Agent 1: \$15 per PPC1600 / PPC1400 / PPC1200 employee, \$5 per PPC1000 employee
- Agent 2: \$15 per PPC1600 / PPC1400 / PPC1200 employee, \$5 per PPC1000 employee

If there are **20 employees on PPC1600**:

Agent 1 earns:  $20 \times \$15 = \$300$

## Special Case: Confidence Multipliers

Confidence client rates vary based on the number of weeks:

Weeks	Plan 1000	Other Plans
2 Weeks	\$5.00	\$15.00
3 Weeks	\$2.31	\$5.00
4 Weeks	\$1.15	\$3.75
5 Weeks	\$1.15	\$3.00

## Output Format

- Grand totals for **Charles / Harry / Lighthouse**
- Colored commission columns
- Client-specific agent breakdown

## System 2: Other Groups (Tier-Based Hierarchy)

### How It Works

- User provides a **Group Name** (e.g., "100 Academy", "Sales Team Alpha")
- Define **one Main / Top Agent** with a tier level (e.g., Tier 35)
- Define **multiple Sub-Agents** below the main agent
- Each agent is assigned a tier level
- Rates are calculated using values from **tier.xlsx**

### Tier Rate Structure (Example)

Tier	PPC1600	PPC1400	PPC1200	PPC1000
35	\$72	\$53	\$35	\$10
30	\$52	\$37	\$30	\$8
25	\$44	\$32	\$25	\$7.50
20	\$37	\$27	\$20	\$6

## Example Group Structure

**Group:** 100 Academy

Agent 1 (Main): Tier 35

- Manages 50 employees
- Earns Tier 35 rates + override from sub-agents

Agent 2 (Sub): Tier 30

- Manages 30 employees
- Earns Tier 30 rates only

Agent 3 (Sub): Tier 25

- Manages 20 employees
- Earns Tier 25 rates only

## Override Calculation Logic

- The Main Agent earns the **spread (difference)** between their tier rate and the sub-agent's tier rate
- Example:
  - Main Agent: Tier 35
  - Sub-Agent: Tier 30

$$\text{Override} = (\text{Tier 35 Rate} - \text{Tier 30 Rate}) \times \text{Employee Count}$$

## Output Format

- Simple commission breakdown by agent
  - No colored columns
  - Agent tier assignments clearly visible
  - Main agent override clearly displayed
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## Proposed Workflow Options

### Option A: Text File Auto-Detection

1. User adds payroll Excel files to `Input_Raw/`
  2. User adds a text file named after the client (e.g., `Confidence.txt`)
  3. System logic:
    - If `[ClientName].txt` exists → **Harry's Group mode**
    - If no matching text file → prompt for **Other Groups** configuration
  4. System processes data and generates report
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### Option B: Terminal Menu Selection

1. User runs the script
2. Prompt:
  - `Select mode: [1] Harry's Group [2] Other Groups`
3. Harry's Group flow:
  - Select client from list
4. Other Groups flow:
  - Enter group name
  - Define main agent tier
  - Define sub-agents and tiers
5. System processes data and generates report

