



Web-based commission tool

Cosmetic medical service provider

Built a centralized web-based tool to reduce the manual efforts of consolidating data in excel sheets from ~100 centers and streamlined the processing of commissions

Cosmetic medical service provider needs a web-based commissioning tool

Picture this...

You're looking to build a centralized web-based tool for the central / regional managers to input & validate the commission data, enable the Finance team to generate a consolidated report and process appropriate payments. Existing process of consolidating the performance data through excel sheets for ~110 centers every month is not sustainable and prone to errors.

You turn to Accordion.

We partner with your team to build a centralized web-based tool to reduce the manual efforts of consolidating data in excel sheets from ~100 centers and streamline the processing of commissions, including:

- 1) Developing a centralized tool where the Center Managers and Regional Directors can login and update the data for their centers and the Finance Team can review the consolidated data along with the estimated commissions in a clean format and process them
- 2) Application to provide a custom view to the Center Managers & Regional Directors with restricted access to only the information of the centers within their purview, thus maintaining the confidentiality of the information provided

Your value is enhanced.

- You have reduced the manual effort for the Finance Team in processing the commissions, by ~60%
- You have eased the process of data input and validation for the Center Managers / Regional Directors, and reduced errors

WEB-BASED COMMISSION TOOL

KEY RESULT

- Reduced effort by ~60%

VALUE LEVERS PULLED

- Commission model
- Excel VBA macros

Collating information through a centralized tool to estimate monthly commissions

Web-based commission tool

Situation

- Client had an opportunity to streamline the exiting commission payment process that is based on the data collected from the Center Managers and Regional Directors using Excel files (~110 Centre Managers and ~10 Regional Directors)
- Partnered with the client to build a centralized web-based tool for the central / regional managers to input & validate the commission data and enable the Finance team to generate a consolidated report and process the appropriate payments

Accordion Value Add

- Existing process of consolidating the performance data through excel sheets for ~110 centers every month was not sustainable in the long run and was prone to manual mistakes
- Developed a centralized tool where the Center Managers and Regional Directors can login and update the data for their centers and the Finance Team can review the consolidated data along with the estimated commissions in a clean format and process them
- Application also provided a customized view to the Center Managers & Regional Directors with restricted access to only the information of the centers within their purview, while maintaining the confidentiality of the information provided

Impact

- Reduced the manual effort for the Finance Team in processing the commissions, by ~60%
- Eased the process of data input and validation for the Center Managers / Regional Directors, and reduced errors

Commissions estimation: Admin screen to initiate cycle

Flexibility for the admin to refresh the headcount report or region to center mapping directly using the application

1. Data Refresh

2. Initiate

Commission Submission Cycle

Please initiate the cycle for CMs and RDs to provide commission details

Commission Submission Cycle:

2018-04_V2

Ability to input custom name for the payroll cycle

Process Timelines:

Start Date:

DD-MMM-YYYY

End Date:

DD-MMM-YYYY

Provision for the Admin to initiate the payroll cycle by providing the start and end dates for the center managers and regional directors to input the required data

Initiate

Commissions Application: Admin screen to review status

Flexibility for the Admin to approve/reject the payroll data provided

Admin can send reminders to input the data and access the data from previous cycles for comparison

Ability to view the status for each center and download the same into an Excel file to review

Ability to effortlessly navigate between different reports

Flexibility for the admin to reject the details provided by the center manager or regional director and send an email to the user with comments

The screenshot displays the 'Status Tracker' report within the 'Current Cycle' section. The report includes a search bar, a table with columns for S.No., Center Code, Center Name, Center Manager, Regional Director, and Status, and a bottom navigation bar with buttons for 'Traveling TPs Bonus', 'Reject', and 'Approve'. Callouts highlight key features: the ability to approve/reject payroll data, send reminders, view status and download to Excel, navigate between reports, and reject details with comments.

	S.No.	Center Code	Center Name	Center Manager	Regional Director	Status
<input checked="" type="checkbox"/>	1	CORP	Corp	-	-	Pending at Regional Sales Director
<input checked="" type="checkbox"/>	2	CC01	Center Name 1	Employee Name 1	Employee Name 2	Pending at Center Manager

Commissions application: User view to input data

Commission Report Review Center Bonus

Center Bonus

Search

S.No.	Associate Name	Center	Title ↑	Associate Status	Hire Date	NPS	Bonus (USD)	Notes
(New)	<div>This is required</div>	<div>This is required</div>						<div></div>

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Commission Report Review Save Submit

Flexibility to select from the dropdown to effortlessly input the data

Center level data would be auto-populated from the database in the backend based on the selection to expedite the process for the user

Ability to provide comments for the details provided

Ability to effortlessly navigate between different reports