

Business Requirement Document (BRD)

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Introduction:

This document outlines the implementation of a new employee discount policy at Company X, following the acquisition by Company Y. The policy involves providing employees and their dependents with free tests up to a capping limit and discounts thereafter. This BRD is designed to make the process straightforward and efficient, replacing the existing Company X discount structure.

Objective:

To integrate Company Y's employee discount policy into Company X's CRM system, enabling employees and their dependents to receive free tests up to ₹5000 per year. Once this cap is reached, a 50% discount will be applied to subsequent tests. This document outlines the requirements, process flow, and exceptions related to this integration.

Stakeholders:

- **Employees:** Beneficiaries of the discount policy.
- **Dependents:** Immediate family members registered in the HRMS portal.
- **Front Desk Staff:** Handles employee registrations and payments.
- **Centre Managers:** Oversees discount approvals and ensures audit readiness.
- **HR Department:** Manages employee and dependent data in the HRMS portal.
- **IT/CRM Team:** Implements and manages the discount system in the CRM.

Process Flow:

1. Initial Registration:

- Employee visits the Front Desk to register for a test.
- The employee provides their name, employee code, and displays their ID card.
- For dependents, the employee gets prior approval via email from the Centre Manager, which mentions the dependent's details.

2. Discount Application:

- Front Desk enters the employee or dependent's details into the CRM.
- The CRM automatically deducts the amount from the ₹5000 wallet.
- Once the ₹5000 limit is used, subsequent tests receive a 50% discount on the MRP.
- Discounts apply only to tests, not packages (for now).

3. Payment:

- The employee pays the discounted amount at the Front Desk.
- Payment is mandatory at the time of registration; salary deductions are not permitted.

4. Annual Reset:

- Each year, ₹5000 is credited to the employee's wallet.
- Unused amounts do not roll over and are reset annually.

Exception Handling:

Approval for Dependents:

- If an employee's family member requires a test and has been added to the HRMS portal, no approval is needed. The money will be automatically deducted from the employee's wallet.
- If an employee's family member requires a test, is added to the HRMS portal, but the wallet is exhausted, the dependent is still eligible for a 50% discount.
- If the wallet is exhausted and the dependent is not added to the HRMS portal, an approval email must be sent by the Center Manager or Head of Department. Without this approval, the discount cannot be applied.

System Errors:

- If the CRM does not reflect the ₹5000 balance or the correct discount, the issue must be escalated to the IT/CRM team for immediate resolution.

Test Cancellation:

- If an employee cancels a test after ₹2000 has been deducted from their ₹5000 wallet, the cancelled amount should be refunded, and the wallet balance should return to ₹5000. The CRM system must update this automatically once the cancellation is confirmed.

Functional Requirements:

1. Employee Wallet System:

- The CRM should have a wallet system that adds ₹5000 annually for each employee.
- The wallet balance should be deducted automatically during test registration.

2. Discount Automation:

- Post ₹5000 usage, the system should automatically apply a 50% discount on all future tests.

3. Approval System:

- Employees must provide prior approval for dependents via email, and the Front Desk should verify this before applying the discount.

4. Audit Trail:

- The CRM must record all transactions for auditing purposes, including test details, employee codes, and discounts applied.

5. Annual Reset:

- The wallet must reset to ₹5000 every year on a predefined date, and unused amounts should be cleared.

Non-Functional Requirements:

1. Usability:

- The CRM interface must be user-friendly for the Front Desk to easily apply discounts and track employee balances.

2. Security:

- Employee and dependent information must be securely stored and accessed only by authorized personnel.

3. Performance:

- The system should update wallet balances and apply discounts in real-time without delays.

Success Criteria:

- The discount process is seamlessly integrated into the CRM.
- Employees and their dependents can easily avail the discounts without manual interventions.
- The system accurately tracks the ₹5000 wallet and applies discounts once the cap is reached.
- Audits reflect accurate records of all transactions, ensuring compliance with company policies.

Assumptions and Constraints:

Assumptions:

- All employees and dependents are correctly registered in the HRMS portal.
- The CRM system can handle the integration of the new wallet and discount structure.

Constraints:

- Discounts are applicable only for tests, not packages.
- Unused wallet balances do not roll over to the next year.