Functional Specifications

“MVP2 – Week Two”

Document Information

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| Project Name | ABSLI Advisor Portal | | |
| Title | FSD, MVP2 – Week 2 | Document version | 1.0 |
| Prepared by | Vijay Rajendran (ABCTSL) | Document Version date | 6-06-2021 |

Document Versions

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Revised by | Description |
| 1.0 | 06-06-2021 | Vijay Rajendran | Initial draft |

# Introduction

New ABSLI Advisor application is a unified portal, combining all major functionalities of Advisor portal, BSLI Way and BSLI Online under one single umbrella. All existing user roles will be able to access the new portal and based on logged in user role, respective modules will be shown as per the requirement. For this phase, we are considering all user roles and its functionality.

## Purpose

Since all the three portals are developed in older versions of SharePoint and licence for the same is getting expired, it's been decided to unify all three portals and create a new one in latest open source technologies.

## References

* User stories and VD shared for week 2

## Assumptions

* All functional ESB API will be modified/created by ABSLI Team and shared to TSL.
* TSL will create a middle wrapper layer for calling these ESB API which will be consumed from the client.
* Few blocks/modules decided to be build using RDS will be fetched as stored procedures, where wrapper API will be created in middleware for consuming it from client.

## Dependencies

Following are some of major dependencies for MVP2 – Week2

* 1. Pending Wireframes and VD for all the modules present in week 2 module has to be made available for development.
  2. VD’s should be shared using a tool where all required assets are available for download and developers can inspect and get the relevant information required for implementation.
  3. ESB API request/response, schema/structure should be made available to TSL for starting middleware API development.
  4. **ESB API should accept required inputs and should cater to paging, filter and search functionality, else ESB API’s will be consumed to get all relevant data and stored in RDS daily for the relevant users, stored procedures will be used to cater to screen/module requirements.**

## In-Scope

* 1. Fully functional mobile adoptive/responsive pages as per approved VD and user stories.
  2. Week 2 User stories are:
     1. Advisor - My Self Landing Page
     2. Agent - Commission List
     3. Agent - Commission Payout Details
     4. Agent - Commission - Tax Statements
     5. Agent - Commission Policywise earnings
     6. Agent - Commission Customer-wise earnings
     7. Agent Commission - Information
     8. Notifications
     9. Agent - Consolidated Commission Statement Download
     10. R&R on Landing Page
     11. R&R Dashboard - Landing Page - Running Contest
     12. R&R Closed Contests
     13. R&R Banner
     14. R&R Updates

**Whereas items 8, 13 and 14 will be taken up along with admin module as it has dependency on Admin module functionality and the scope has to be detailed out.**

# Functional Requirements

## Advisor – My Self Page

### Requirement

**Description**:

As an Advisor I want to see a snapshot of my earnings

**Details**:

1. Header - Last Commission Paid <Amount>, <Last Payout cycle YY MM and Fortnight>,

Total Commission Paid <Commission Paid till date in current FY>, "From Apr '21(Start of FY to be dynamically picked) till Date)

2. On-Page notification/Banner/Alert Band space - Refer Commission Notification story

3. Quick Links ->Commissions, R&R, Tax Certificates, Commission Statements, Updates,

4. Commissions - 5 rows (last 5 payout cycles) with "View Details" to lead to Commissions Page

Payout Cycle Name, Payment Date, Amount Paid, UTR No. CTA - "View Details", "Download" (for each Payout?)

"View Details" > Open Summary view for payout cycle

* 1. R&R Summary - 5 rows with Show More to lead to R&R Page

1. To show performance on currently running contests for which an agent is eligible

Contest Period (From DDMMMYYYY to To DDMMMYYYY), Contest Name, Reward Achieved (On Intro), Status (Running, Results Awaited, Final Results) CTA - View Details->

(Uploaded and linked through Admin Module)

Tabs - Running Contests, Closed Contests

2. Show 5 contests on landing page

3. Show More Button on section to take to R&R Landing Page

4. Click on any row to show list of policies which contributed to achievement -> Policy ID, Policy Holder Name, Plan Name, Modal Premium, FYP, WFYP, Reason for not consideration (Remarks from system - Min Ticket Size, Surrender clawback etc) "

### Implementation Approach

My Self is a new page for all three user roles. Based on logged in user\_role, fields and sections to be shown in this page will vary. User will navigate to this page from top menu My Self option.

Please find below the UI element mapping for the three roles. Based on the logged in user role, top blocks, quick links and main sections will be handled. This section will cover details for Advisor user role.

|  |  |  |
| --- | --- | --- |
| **Role** | **Section** | **Blocks/CTA/Links** |
| Advisor | Notifications | Self-targeted notifications |
| Agent Manager | Notifications | Self-targeted notifications |
| Supervisor | Notifications | VD not shared |
| Advisor | Top cards | Last Commission Paid, Total Commission Paid |
| Agent Manager | Top cards | Achievement |
| Supervisor | Top cards | VD not shared |
| Advisor | Quick Links | Tax Statements, Commission Statements, Updates |
| Agent Manager | Quick Links | RnR, Team RnR, Updates |
| Supervisor | Quick Links | VD not shared |
| Advisor | Content Blocks | Latest 5 commissions, Latest 5 RnR |
| Agent Manager | Content Blocks | Latest 5 RnR |
| Supervisor | Content Blocks | VD not shared |

Notifications which are matching scheduled to be shown, will be fetched from RDS using a new procedure and to be shown to the user based on logged in user role.

Top cards, Last commission paid and Total commission paid also will be fetched from ESB API, based on logged in user role and to be shown.

Quick links are static links.

Advisor role will have Commission and RnR sections where data for both will be fetched using ESB API.

**Fields to be shown in Commissions block:**

Payout Cycle, Payment Date (DD-MMM-YYYY), Amount paid, UTR No.

**CTA:** 1) Download commission details – to download excel report for that payout cycle. 2) View Details - to take user to commission summary page, See More – To take user to commission listing page.

**Fields to be shown in RnR block – Running Contest:**

Contest Period, Name of Contest, Reward Achieved (on issuance), Status. **CTA**: View Details- to be taken to Contest summary page

**Fields to be shown in RnR block – Closed Contest:**

Contest Name, Contest End date, Reward, Choice, Payout Status. **CTA**: View More- to shown additional details below the selected record.

**View More Fields:** Payout Mode, Payment Date, Bank Account Number, UTR Number

### 2.1.3 API and RDS Requirements

For notification, new RDS procedure will be created and will be consumed using

Please refer Sno 1 to 5 in the attached excel for the API/RDS requirements.



### 2.1.4 CTA Templates

**On Page Toast message**:

You will receive the commission statement for <period> on your registered email <masked email>

**Email:** Pending from business.

**SMS:** Pending from business.

### 2.1.5 Open Points

NA

## Advisor – Commission List

### Requirement

**Description**:

As an Advisor, I want to see a summary of commissions being paid to me as there is a high variability in my income because I don’t earn a regular income

**Details**:

1. Commission Paid Details - should be able to reconcile against bank statement

Default Display - last 10 payout cycles by default, sorted by most recent on top

Filter available - MTD, YTD, Custom Range (MMM-YY)

Payout Details:

Payout Cycle, Payment Date, Amount Paid, UTR No. CTA - "View Details", "Download" (for each Payout)

"i" icon to be added on each sub-heading -> Should open a modal to explain the terms used in that section - Term Name and Description (Backend - take details from Saiyur)

2. "View Details" CTA to lead to detailed Summary Page

Fields to be shown - Breakdown of earnings for the selected payout cycle

Summary Screen CTA -> "Download XLS" - will download Payout cycle wise Statement with breakdown of commission + Policywise breakup (Refer Commissions xls)

3. Auto-notification (detailed in Commissions notification story) - Should be notified whenever a new payout is released (on-page notification) - "Congratulations! Commission for <period> has been released to you" CTa -> to Lead to Commissions Summary page for that payout cycle

Backend

3. No. of Payout cycles in a month + Names - should be dynamically picked and displayed

4. Provide (i) section as a glossary of different terms used in statement - Detail of each term in section to be added in BRD

### Implementation Approach

Commission listing is a new page which needs to be created for advisor role in DSF or APC channel.. Listing page data will be fetched using ESB API and wrapped in middleware and will be rendered in front end.

Filter, sorting, paging will be handled at ESB API end and the corresponding result will be shown in the front end.

Existing date rage validations will be applied to this page.

**Fields to display**:

Payout cycle, payment date, amount paid, UTR no

CTA – Download document and View Details as per VD.

Download document when clicked will call an ESB API for generating excel download.

View Detail will take user to commission summary page which is a new page to be created.

### 2.2.3 API and RDS Requirements

ESB API will be created for showing commission listing page based on logged in use role.

Please refer Sno 6 in the attached excel for the API/RDS requirements.



### 2.2.4 CTA Templates

**On Page Toast message**:

You will receive the commission statement for <period> on your registered email <masked email>

**Email:** Pending from business.

**SMS:** NA

### 2.2.5 Open Points

1. Download XLS – field mapping
2. Please share the on-screen message and email template for download CTA.

## Advisor - Commission Payout Details

### Requirement

**Description**:

As an Advisor, I want to see detailed breakdown of commissions being paid to me

<https://adityabirlacapital-my.sharepoint.com/:x:/p/anupam_sharma1/EYky_8qlb-JNr8qlIbFBuS4BfdSBxoVGv6jITDi0VPmP6w?e=v4Z7S0>

**Details**:

1. Refer Commissions sheet for format - Breakdown of earnings and deductions for the selected fortnight - https://adityabirlacapital-my.sharepoint.com/:x:/p/anupam\_sharma1/EYky\_8qlb-JNr8qlIbFBuS4BfdSBxoVGv6jITDi0VPmP6w?e=v4Z7S0

2. Only for download in xls format - Page-1 Summary, Page-2 onwards - Policywise details, followed by other sections

Policywise - Breakdown for the selected fortnight -- should tally against fortnight summary);

Should have sections to show - (FYC, RC, Commission on Hold, Other recoveries, Surrender adjustment)

4. Should get a CTA to "Download XLS" of fortnightly statement -

Show toast message

"Statement for <Period> has been downloaded successfully"

Design to be Changed from this->

"You will receive statement for <Period> on your registered email ID <Email ID>"

Disable CTA till email is sent

Backend - Email should be sent instantly for payout cycle wise statement

### Implementation Approach

Commission Payout Details is Commission Summary page as per VD.

**Fields to display:**

Payout cycle name, payment date, amount paid, UTR no as top section.

**Base commission/contest with info icon(i)**

First year commission, Renewal Commission, Policy Lapse Chargeback and Total earning amount(A) as per VD

**Clawback with info icon(i)**

Inter channel clawback, Intra channel clawback, Recovery against renewal charges/ATS and CAMS Recovery, 4% capping for Terminated agents, Recovery against Contest, Total clawback commission amount(B), Amount Payable (Gross) (C) (A+B), Agent GST amount (D), commission amount payable (Net) (E) (C-D), TDS on Commission (F)

**Other Recovery Amount(i)**

Cheque dishonour recovery, Professional Tax Recovery, Medical recovery, Total Other Recovery(G), Net amount credited to bank account(H) (E+F+G), Unpaid commission amount – As on date (I)

On clicking on each information(i) icon, model dialog should ne opened with content explaining terminologies used as per VD.

### 2.3.3 API and RDS Requirements

RDS will be used for showing commission summary page and downloading the excel for logged in user.

Please refer Sno 7 to 8 in the attached excel for the API/RDS requirements.



### 2.3.4 CTA Templates

**On Page Toast message**: You will receive the commission statement for <period> on your registered email <masked email>

**Email:** Yet to be shared by business

**SMS:** NA

### 2.3.5 Open Points

1. Confirmation on Field mapping for Request XLS download
2. Email template to be shared for Request XLS CTA

## Advisor – Commission - Tax Statements

### Requirement

**Description**:

As an Advisor I want to view, download my tax statement to share them with CA or my accounts department for filing

**Details**:

Navigation > Self-Landing Page > Quick Links "Tax statements"

1. View/Download tax statements for specified period:

Title: TDS Certificate

Select - FY 2021 (Current FY), FY 2020 (Last FY), Older Statements

If Current/Last FY Selected

Show Quarter wise list of TDS Certificate (Newest to Oldest - Q4, Q3, Q2, Q1)

Quarter Number, Period, CTA - "Download"

If Older Statements

Select FY (Last 5 years - to be confirmed in BRD) > Select Quarter (Q1, Q2, Q3, Q4)

Backend should send TDS Certificates for all Quarters for that FY

CTA - "Raise Request"

3. If the statements cannot be provided in real time -> Raise a request and acknowledge " Your request for <type of statement> for <Date Range selected> has been successfully submitted. You will receive the statement on your registered email <Masked email> and <masked mobile number> in 24hrs."

Send message to registered email ID and mobile

### Implementation Approach

This screen is new and will be available for Advisor roles.

When clicked from Quick links section, Tax Statements page will be opened which will have TDS certificate card.

On click on this card, model dialog will open with select Year dropdown. Dropdown values will have last two FY years and Request for older statements options.

If last two-year FY options are selected, then quarterly wise statement options will be shown for user to select and download.

If Request for old statement is selected, then select older year drop down option will be shown with T-7 to T-3 years, which when selected, corresponding quarterly wise statement option will be shown for user to select and raise request. CTA label to change from Download to Raise a Request for older statements.

### 2.4.3 API and RDS Requirements

ESB API will be used for both download and request older tax statement for selected quarter and financial year.

Please refer to sno 9 to 10 of the attached API mapping sheet for exact RDS/API details



### 2.4.4 CTA Templates

**On Page Toast message**:

**Raise a Request:**

Your request for <type of statement> for <Date Range selected> has been successfully submitted. You will receive the statement on your registered email <Masked email> and <masked mobile number> in 24hrs.

**Download:** Pending from business

**Email:** Pending from business

**SMS:** Pending from business

### 2.4.5 Open Points

1. Toast message for download CTA
2. SMS and Email template for Request CTA

## Advisor - Commission – Policy-wise earnings

### Requirement

**Description:**

As an Advisor, I should be able to see total earnings I have had from a policy as it encourages me to prevent it from lapsation

**Details**:

1. Create a section for Earnings on Policy Details Page

2. Show "Total commission Earned" > Breakdown into First Year Commission and Renewal Commission,

Commission Rate - x%

3. Default view to show last 5 earnings - lazy loader to show more

Fields - Payout Cycle, Transaction Date, Commission Amount, Payout Status (Paid, To be paid > CTA View Details (to expand below)> Premium Amount, Commision Rate - Base, Commission Rate - Rider, Clawback/Refund Amount, CLAWBACK/HOLD/REFUND/RELEASED REASON (if applicable)

CTA -> View Payout Cycle Details

### Implementation Approach

This is a new section which will be added to Policy Details page as Earnings next to Policy Statements tab. ESB API will be used to show the records as per the VD for the particular policy id. API to return records in order of earning recency.

Fields to be shown:

Total commission, First year commission, Renewal Commission, Commission Rate %

And also List of Payout cycle, transaction date, commission amount, status, premium amount, commission rate-base, commission rate-rider, clawback/refund, clawback/refund/recovery amount reason.

CTA – View Payout Cycle details, on click will be taken to commission summary page.

### 2.5.3 API and RDS Requirements

This section will be rendered by using RDS and wrapped in middleware.

Please refer to sno 11 of the attached API mapping sheet for exact API details



### 2.5.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.5.5 Open Points

NA

## Advisor - Commission – Customer-wise earnings

### Requirement

**Description:**

As an Advisor, I should be able to see total earnings I have had from a customer as it encourages me to prevent it from lapsation

**Details**:

1. Create a section for Earnings on Customer Details Page

2. Policy-wise earnings from customer

Default view to show 5 policies - lazy load "Show More" - sorted by Policy Status (starting with Active, Paid Up, Matured, Lapsed, Terminated, Discontinued)

Fields - Policy ID, Plan Name, Policy Status, Total Commissions earned, CTA "View Details" > Click on any row should take to Policy Details > Earnings Page

### Implementation Approach

This is a new section which will be added to Customer Details page as Earnings next to Policy Statements tab. ESB API will be used to show the records as per the VD for the particular customer. API to return records in order of earning recency.

**Fields to be shown:**

Policy id, plan name, policy status, total commission earned.

CTA – View Details, on click will be taken to earnings tab of that particular policy detail page.

### 2.6.3 API and RDS Requirements

This section will be rendered by using RDS and wrapped in middleware.

Please refer to sno 12 of the attached API mapping sheet for exact API details



### 2.6.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.6.5 Open Points

NA

## Advisor - Commission – Updates/Information

### Requirement

**Description:**

As an Advisor I should be updated on any changes/updates in way my commissions are calculated, Any new methods/contests, FAQs etc

**Details**:

Updates Page ->Navigation from Quick Links

Product-wise commission rates

1. Admin User (DDM/Accounts/commissions team) should be able to upload/edit announcements, information, FAQs from Admin Module

2. Admin User should be able to upload different material for different channels and user designations, Levels of Agent (list to be picked up dynamically from HL)

2. Should be visible to Advisor under ""Updates"" section of Earnings

Updates section -> Any commission related information uploaded using Admin Module eg) Current commission rates for different products, Commission FAQs

### Implementation Approach

This section is a new page which can be navigated from Updates in Quick links section of My Self page.

Data for this page will be fetched from RDS where the appropriate documents which are assigned for logged in role and user will be shown as card and on click will either a download or link as per admin module configuration.

**Fields to be shown:**

Document type card with name and icon.

CTA – It will either be a download or link as per configuration.

### 2.7.3 API and RDS Requirements

This section will be rendered by RDS proc and wrapped via middleware API.

Please refer to sno 13 of the attached API mapping sheet for exact API details



### 2.7.4 CTA Templates

**On Page Toast message**: <Content Name> has been downloaded successfully.

**Email:** NA

**SMS:** NA

### 2.7.5 Open Points

* Fields mapping for this functionality in admin module
* On screen toast message to be shared.

## Advisor - Consolidated Commission Statement Download

### Requirement

**Description:**

As an Advisor, I want to see details of my earnings against every payout released like a mobile bill statement so that I can reconcile my expected earnings against actual to identify and raise any discrepancies

**Details**:

MySelf Landing Page > Quick Links > Commission Statements CTA to be provided below filter > Select Range (Current FY(FY22), Last FY(FY21), Older) >

If Current FY - Select Range Month and Year From and To Dates

Default From Date (Apr '21) - To Date (Current month) - User Can change

If Last FY > Custom Selection Range From Date YY - MMM and To Date (Apr '20 to Mar '21)

Default will be prefilled with complete FY range (Apr - Mar) -> User can change

If Older selected > Choose YY - MMM - Payout Cycle to download (No consolidation for older statements) (No Range to be selected)

Custom Range available for selection - within Last 2 FYs for a max period of 24 months. For older details - should be able to input Date Range (MMM-YY) and raise a request - Requested statements should be sent to email ID + made available on a link to be downloaded by the agent

Should be able to download detailed statement for last 2 FYs, For Date Range before Jun 2019, should see an option to download statements based on Month, Year and FT selected -> Message to be shown on screen - ""Only fortnight-wise statements are available for period before Jun 2019. Please select the desired fortnight to download.""

CTA -> "Request"

Acknowledgment - ""Statement for <Selected Period> will be sent to your registered email ID <email ID>""

1. Details to be made available against every payout - Summary view on screen and detailed statement in PDF and xls for download

2. Should be able to generate consolidated statement for specified period

3. Sample format to be attached (Page-1 - Header- Agent Name, Code, Masked Bank detail, Period selected; Fortnight-wise summary of all payouts in the selected period, Page-2 onwards- Policywise breakup of all fortnights)c- fields in attachment

5. Flexibility to add/modify parameters as per changes in HL - eg clawback, hold - If new parameter is added for calculation in HL - should dynamically be added to commissions view under respective head as well

5. Download Consolidated Statement CTA - (HL has data - consolidated for YTD can be done)

### Implementation Approach

This option will be available for Advisor roles.

When clicked from Quick links section, Commission Statements model dialog will be opened with select Year dropdown. Dropdown values will have last two FY years and Request for older statements options.

If any one of last two-year FY options is selected, from month and to month drop downs will be visible, with the list of months in the selected FY as options to select. To month can’t be lesser than from month and from month can’t be greater than to month. For current FY- to date will be till current month.

If Request for old statement is selected, then select older FY year drop down option will be shown with T-7 to T-3 years, which when selected, corresponding moths available in the selected FY will be shown, month when selected, then payout cycle dropdown will be shown based on the selected month and year.

Also, message “Only fortnight-wise statements are available for period before Jun 2019. Please select the desired fortnight to download” should be shown in the model dialog as per VD.

CTA – Raise Request – when clicked request will be raised and message will be shown to the user.

### 2.8.3 API and RDS Requirements

Statement request will be raised using ESB API.

Please refer to sno 14 of the attached API mapping sheet for exact API details



### 2.8.4 CTA Templates

**On Page Toast message**: Your request for <type of statement> for <Date Range selected> has been successfully submitted. You will receive the commission statement on your registered

email <Masked email>

**Email:** Pending from business

**SMS:** NA

### 2.8.5 Open Points

* Fields mapping for consolidated commission report
* SI request once raised; can the user raise another request.
* Whether CRM API will share the SI ticket no and status?
* Mailer template

## Advisor – RnR List – Running Contest

### Requirement

**Description**:

As an Advisor, I want to see status of my qualification for the contests I am eligible or have opted for so that I get a view of the target I need to achieve

**Details**:

"Default View to show currently running contests to which they are eligible (Eligibility to be mapped in some system - to define in backend - xl upload? HL?), sorted by most recent on top

Contest Period (From DDMMMYYYY to To DDMMMYYYY), Contest Name, Reward Achieved, Status (Running, Results Awaited, Final Results) CTA - View Details->

""View Details"" - to open Contest Details Page

### Implementation Approach

Rewards and Recognition listing is a new page which needs to be created for all three roles. Listing page data will be fetched using ESB API and wrapped in middleware and will be rendered in front end. This page will have two tabs, Current contest and Closed Contest.

Filter, sorting, paging and search will be handled at ESB API end and the corresponding result will be shown in the front end.

**Fields to display – Current Contest**:

Contest Period (From DDMMMYYYY to To DDMMMYYYY), Contest Name, Reward Achieved(On Issuance), Status (Running, Results Awaited, Final Results) CTA - View Details->

"View Details" - to open Contest summary Page

### 2.9.3 API and RDS Requirements

RDS will be used for showing current contest listing page based on logged in use role. RDS will be used with option to filter data and search. Default order will be recency of running contest.

Please refer Sno 15 in the attached excel for the API/RDS requirements.



### 2.9.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.9.5 Open Points

NA

## Advisor – RnR List – Past Contest

### Requirement

**Description**:

As an Advisor, I want to see results of past contests, which are currently not running

**Details**:

Tab to show "Past Contests"

Details to be shown:

1. Should be able to see settlement details of past contests - Contest Name, Contest End Date, Payout Mode, Status of Payout > Show last 10 settled contests with lazy load

View More >

Reward , Choice

If Reward Qualified= ""Gift A"" | ""Conventions""

Choice = <Gift, Convention, Encashment>

Option Selected = ""Gift"", Field - If Dispatched, Show <Date of Dispatch> ELSE ""Pending""

Option Selected = ""Encashment"" , Fields - Gross Earning, Deductions (Recovery Amount, Expenses etc), TDS Deducted, Net Earning,

If Payout Status= Paid, Payment Date, Masked Account Number, UTR Number

ELSE, Show ""Pending""

Option Selected = ""Conventions"" --- To check feasibility in system -> Open Learning Summit Calendar

CTA - "Contest Details" >Open Past contest PPT

2. Should get an option to raise a query for past contests - lead to which system?

3. Clicking on "Contest Details" -> Contest PPT

4. Search by Contest Name

Filter by Payout Status: Settled, Not settled

Filter by Contest End Date: Last 3 months, Last 6 Months, Custom (From MMM-YY to MMM-YY) [Range and Period to be defined in BRD]

CTA- Raise Query for contest - Query goes to R&R (Only 90 days post result announced)"

### Implementation Approach

RnR Past contest listing is a tab section in RnR listing page which needs to be created for all three roles. Listing page data will be fetched using ESB API and wrapped in middleware and will be rendered in front end.

Filter, sorting, paging and search will be handled at ESB API end and the corresponding result will be shown in the front end.

Existing date rage validations will be applied to this page.

**Fields to display**:

Contest name, contest end date, reward, choice, payout status,

CTA –View more as per VD.

**View More Fields**:

Payout mode, payment date, bank account number, UTR no, dispatch date, Gross Earning, Deductions (Recovery Amount, Expenses etc), TDS Deducted, Net Earning

### 2.10.3 API and RDS Requirements

RDS will be created for showing past contest listing page based on logged in use role.

Please refer Sno 16 in the attached excel for the API/RDS requirements.



### 2.10.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA.

**SMS:** NA

### 2.10.5 Open Points

* Will the view more fields change for other payment mode? If yes, then fields mapped against each mode is required.
* There is lot of difference between the Requirement and final VD. Which one needs to be followed?
* If gift types is convention, what should be shown in view more?

## Advisor – RnR– Contest Summary

### Requirement

**Description**:

As an Advisor, I want to see contest summary page of a contest

**Details**:

Header Info -> Contest Name, Duration, Status

Reward

Final Reward for last slab,

If Enrolment Needed = ""Yes"" and Enrolment Done = ""No"",

Show Label = ""Enrolment Needed"", Value= ""Yes"" (Should be able to configure from admin)

AND Do not Show Reward Achieved -> Label + Value

Else do not show Label/Value for Enrolment Needed, Show Reward Achieved, Next Slab, Final Reward

Parameter(s) for Qualification (Qualifying Route) {FYP, NOP, FYC, Persistency} - should only show parameters where value exists)

Achievement on Intro -> Slab achieved - FYP, NOP, FYC, Persistency Achieved, Target for next slab {Shortfall for next slab on different parameters - FYP, NOP, FYC, Persistency}, CTA > ""Policy-wise Details""

Achievement on Issuance --> Slab achieved - FYP, NOP, FYC, Persistency Achieved, Target for next slab, {Shortfall for next slab on different parameters - FYP, NOP, FYC, Persistency}, CTA >""Policy-wise Details""

CTA > ""Contest Details"" - Click to open Launch Mailer (in new browser tab) for the contest (Launch Mailer to be uploaded through Admin Module on Portal)

Click on any ""Policywise Details"" ->Tab toshould show list of policies through which qualified - All policies logged in the period, along with reason for not considering (Remarks from system - Min Ticket Size, Surrender clawback etc)

Fields on Policy List ->

Application ID, Policy Owner Name, Date of Login, Modal Basic Premium (without GST) , CTA -> View More (Expand to show more details

Policy ID, Date of Issuance(if issued), Plan Name, FYP, WFYP, Remarks [Reason for not consideration (if applicable)] -->

Backend - dynamic fields to be picked based on contest

CTA (to be shown only if policy is issued)-> ""Policy Details""

Click on Persistency Value to open Overdue Page

5. Search by Contest Name - Match anwhere within contest name > Auto populate with results > Click should open details of that contest

Filter by Type of Contest: Monthly, Quarterly, Annual, Others; Checkbox - allow multiple selection

Filter by Qualification Status - Qualified, Not Qualified (All the Best)

6. Should put date label of update "" Data updated on <Date+Time>""

7. Should be able to raise a query (redirect to R&R appropriate sub-section);

Backend

All parameters and status to be picked from system (?) and modulated

In case any additional parameter/criteria needs to be considered - should be able to pick up from HL (?)

Should be able to see a summary of all contests

8. Exception to be considered - For some contests with overlaps, If qualified for multiple contests, only one is paid out - Data to be picked from where to show on portal? [Rajnish to assist with status to be shown for such cases] - Can we upload contest names where only one contest will be considered for payout - higher reward will be paid out - Status to be shown for Merged contests?

9. Should be made available real time - should put date label of update "" Data updated on <Date+Time>""

10. <List of rewards of contest>

11. Should be able to raise a query (redirect to R&R appropriate sub-section);

Should be able to go to Contest ( PPT + FAQs) for each contest

12.<Define empty states, alternate scenarios, unhappy paths>

CTA - Raise Query -> to go to MIS"

### Implementation Approach

Contest summary page is a new page which needs to be created for all three roles. This page has two sections. Top block with contest and its reward details. Next section has three tabs. 1) Achievement on Issuance 2) Achievement on Intro and 3) Policywise details. Data for both top block and 3tab sections will be fetched using ESB API and wrapped in middleware and will be rendered in front end.

**Fields to display - Top Section**:

Contest name, contest start date, contest end date, contest status, reward achieved, reward for next slab, final reward, enrolment required.

**Fields to display – Achievement on Issuance:**

Slab Achieved - FYP, NOP, FYC, Persistency Achieved, Target for next slab, {Shortfall for next slab on different parameters - FYP, NOP, FYC, Persistency} to be dynamically fetched from backend which are configured for that contest. The API should return card label, metric name and its value dynamically so that this section can constructed as per VD in front end.

**Fields to display – Achievement on Intro:**

Slab achieved - FYP, NOP, FYC, Persistency Achieved, Target for next slab {Shortfall for next slab on different parameters - FYP, NOP, FYC, Persistency} to be dynamically fetched from backend which are configured for that contest. The API should return card label, metric name and its value dynamically so that this section can constructed as per VD in front end.

**Fields to display – Policywise details:**

Application ID, Policy Owner Name, Date of Login, Modal Basic Premium (without GST) , CTA -> View More (Expand to show more details

Policy ID, Date of Issuance (if issued), Plan Name, FYP, WFYP, Remarks [Reason for not consideration (if applicable)]

CTA – View Policy Details – on click should take user to the policy detail page.

### 2.2.3 API and RDS Requirements

RDS will be created for showing commission listing page based on logged in use role.

Please refer Sno 17 to 20 in the attached excel for the API/RDS requirements.



### 2.2.4 CTA Templates

**On Page Toast message**: NA

**Email:** NA

**SMS:** NA

### 2.2.5 Open Points

* View Contest Details CTA is not mentioned in requirement but present in VD?
* Requirement has mention for raise a query which is not there in VD?
* Also download option of ppt etc are not present in VD.

**END**