

Incentives — SOP

How this module works

Tracks sales commission earned automatically from real invoices, and lets you configure the payout slabs that decide how much each bill earns. It never creates incentive records itself — every record starts the moment an invoice is created, and Invoice is the only place that writes them.

SECTIONS

● KPI Row Confirmed total, pending total, record count, average per bill, and the current top earner.	● Monthly Incentive Trend Confirmed vs pending incentive value, last 6 months.
● Leaderboard Every team member ranked by total earned (confirmed plus pending), with a confirmed-vs-pending split bar.	● Incentive Slabs The bill-amount ranges that decide payout — add, edit, or delete a slab here. A slab someone has already earned from keeps its historical link even after the slab itself is deleted.
● All Incentive Records Every incentive ever earned, newest first, with its invoice, sales person, amount, and status.	

STEP-BY-STEP WORKFLOW

- 1 Set up your slabs first — each one is a bill-amount range paired with a fixed payout, for example two thousand to five thousand rupees earns fifty rupees.
- 2 From there it runs on its own — when a bill is raised for a sales person whose name matches a team member, the matching slab is looked up automatically and a pending incentive record is created.
- 3 The incentive stays pending until the bill is fully paid, at which point it flips to confirmed on its own — no manual step needed.
- 4 If the invoice is deleted before payment, the pending incentive is cancelled with it.
- 5 Check the Leaderboard and KPI row any time for a live read on who has earned what, confirmed versus still pending.

CONNECTIONS

● Invoice Every incentive record is created and confirmed entirely from Invoice events — this module never writes to an invoice, it only reads what Invoice has already decided.	● Leads The sales person credited on an incentive is matched against the same assigned-to name used throughout Leads, so the Leaderboard lines up with who is actually working each deal.
● Staff Portal Each team member sees their own personal incentive history in their own Staff Portal, pulled from the exact same records shown here.	

