

INTODAY · BONUS GUIDE

Bonus Plans & Progress Tracking

Review configured plans, period trackers, and the personal Bonus Report—kept separate from ordinary booked earnings and invoiced sales.

Two records, two purposes

Bonus plan

Defines the assigned person, rate/pay type, target, frequency, and date range.

Bonus tracker

Represents one plan period and records progress, whether the target was met, payout due, and status.

A tracker is not a payment confirmation. A visible amount or completed period does not prove payroll inclusion, approval, transfer, or bank settlement.

Administrator: review the plan list

Open **Bonus Plans**. The list shows User, Description, Bonus Rate, Target, Frequency, and Date Range, with Search, More Filters, bookmark/lens, sorting, and refresh controls.

	ID	User	Description	Bonus Rate	Target	Frequency	Date Range	Actions
72		Rachel G. rachel.green@example.com	10.00\$/fixed bonus - 40 billed every month	10.00\$/fixed	40	month	Jul,01 - Jul,31 27	
71		Ashley D. ashley.davis@example.com	2.50\$/hr bonus - 120.00 billed every month	2.50\$/hr	120.00	month	Jun,01 - Jun,30 27	
70		Robert G. robert.garcia@example.com	8%/hr bonus - 320 billed every year	8%/hr	320	year	Dec,01 - Dec,31 26	
69		Jennifer T. jennifer.thompson@example.com	10%/hr bonus - 80 billed every month	10%/hr	80	month	Apr,01 - Apr,30 27	
68		Sophia L. sophia.lee@example.com	3%/hr bonus - 1666.66 billed every year	3%/hr	1666.66	year	Aug,01 - Aug,31 27	
67		Olivia T. olivia.taylor@example.com	75\$/hr bonus - 25.00 billed every week	75\$/hr	25.00	week	Apr,01 - Jan,31 27	
66		Emma R. emma.rodriguez@example.com	5.00\$/fixed bonus - 30.00 billed every week	5.00\$/fixed	30.00	week	Apr,01 - Apr,30 27	
65		Jessica W. jessica.wong@example.com	3.00\$/hr bonus - 150.00 billed every month	3.00\$/hr	150.00	month	Feb,01 - Feb,28 27	
64		Sarah T. sarah.thompson@example.com	5%/hr bonus - 160 billed every month	5%/hr	160	month	Oct,01 - Apr,30 27	

The list brings each person's bonus rate, target, frequency, and active date range together.

Use the list to review existing plans. Creating or editing a plan changes compensation terms, so confirm the details before saving.

Open one plan and read its tracker periods

The plan detail displays a \$75/hour plan, a 25-hour weekly target, its active date range, and weekly trackers.

The screenshot shows a web application interface for managing bonus plans. The top section displays the plan details for Olivia Taylor, including a bonus rate of \$75/hr, a target of 25.00 per week, and a date range from Aug 27 to Sep 27. Below this, there is a section for 'Bonus Trackers' which lists 10 individual trackers. Each tracker row includes an ID, the user's name, the bonus plan, the period, progress, target met status, payout due, and a status button.

ID	User	Bonus Plan	Period	Progress	Target Met	Payout Due	Status
1301	Olivia T.	\$75/hr (25.00 per week)	Sep 28 - Oct 04	0/25 hrs	Target Met	\$0.00	Active
1304	Olivia T.	\$75/hr (25.00 per week)	Sep 21 - Sep 27	1/25 hrs	Target Met	\$0.00	Active
1303	Olivia T.	\$75/hr (25.00 per week)	Sep 14 - Sep 20	0/25 hrs	Target Met	\$0.00	Active
1302	Olivia T.	\$75/hr (25.00 per week)	Sep 07 - Sep 13	0/25 hrs	Target Met	\$0.00	Active
1301	Olivia T.	\$75/hr (25.00 per week)	Aug 31 - Sep 06	0/25 hrs	Target Met	\$0.00	Active
1300	Olivia T.	\$75/hr (25.00 per week)	Aug 24 - Aug 30	0/25 hrs	Target Met	\$0.00	Active
1299	Olivia T.	\$75/hr (25.00 per week)	Aug 17 - Aug 23	0/25 hrs	Target Met	\$0.00	Active
1245	Olivia T.	\$75/hr (25.00 per week)	Aug 10 - Aug 16	0/25 hrs	Target Met	\$0.00	Active
1327	Olivia T.	\$75/hr (25.00 per week)	Aug 03 - Aug 09	0/25 hrs	Target Met	\$0.00	Active
1348	Olivia T.	\$75/hr (25.00 per week)	Jul 27 - Aug 02	0/25 hrs	Target Met	\$0.00	Active

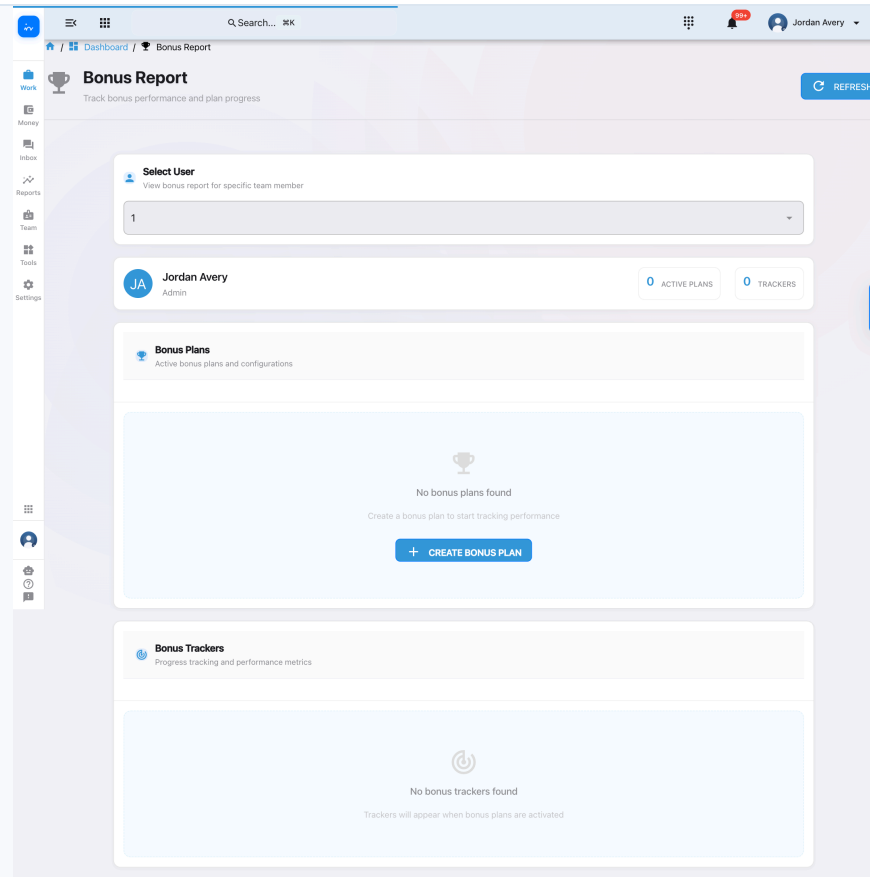
Plan details and tracker rows keep targets, progress, payout due, and status together.

1. Confirm the assigned person and date range.
2. Read Bonus Rate together with Pay Type and Raw Pay Amount.
3. Confirm Target Goal, converted hours/minutes, and frequency.
4. Read each tracker's period, progress, Target Met, Payout Due, and Status as one row.

Units matter. A raw value is incomplete without its pay type and target units. Do not assume every numeric value is dollars.

Bonus Report: personal progress and admin selection

Open **Dashboard** → **My Bonus Report**. In the admin view, a Select User control changes whose active plans and trackers are displayed.



Admin report for Jordan Avery: user selector, plan count, tracker count, Bonus Plans, and Bonus Trackers sections.

Administrator view

Select User changes whose active plans and trackers are displayed.

Personal view

The personal report keeps one person's bonus plans and tracker progress together.

Use bonus information responsibly

- Confirm the assigned person, period, rate, units, and target before changing a plan.
- A tracker shows progress and payout due; it is not a payroll approval or payment confirmation.
- Bonus reporting is separate from ordinary booked earnings and clinic-wide invoiced sales.
- Follow your clinic's compensation and payroll policy when a bonus becomes payable.

Keep the reports separate. My Income Report covers booked, billable, and billed earnings; Reports → Income covers clinic-wide invoiced sales; Bonus Report and Bonus Plans cover incentive configuration and progress.