



iSocietyManager

Client Onboarding Process

*iSocietyManager is complete suite for real estate and facility management.
This document detailed down the onboarding process for clients*

<u>Service</u>	<u>Time (Days)*</u>
• <u>Master Data Setup</u>	0.5
• <u>Billing</u>	2
• <u>Complaint Management</u>	1
• <u>VMS</u>	1
• <u>Maid / Staff Attendance</u>	1
• <u>Inventory</u>	1
• <u>Online Payment</u>	5
• <u>Meter Integration</u>	5
• <u>PPM</u>	1
• <u>Asset Tagging</u>	5
• <u>Survey & Poll</u>	0.5

*Expected provided data provided by client

Master Data Setup

[Home](#)

Activity

Time (Hrs)

- Configure Cluster / Tower
- Import Owners & Tenants
- Configure Different Role/ Permission
- Add Admins/ Facility
- Parking Details(Vehicle, Sticker)
- Training
(Spread across multiple days)

1
1
1
1
2
2

Data Required

Billing

<u>Activity</u>	<u>Time (Hrs)</u>
• Bill Formats	8
• Opening Balance	2
• Tariff Configuration	1
• Bill Plan Mapping	2
• Bill Start Date	1
• Billing Cycle	0.5
• Billing Sequence	0.5
• Training (Spread across multiple days)	8

Complaint

[Home](#)

Activity

Time (Hrs)

- Staff/ Supervisor Roster
- Nature / Sub Nature
- Setting – OTP/ Alerts
- Complaint Escalation
- Daily Email
- Training
(Spread across multiple days)

2

1

0.5

0.5

0.5

4

VMS

[Home](#)

Activity

Time (Hrs)

- | | |
|---|-----|
| • Society Staff Addition | 0.5 |
| • Setting as per demand | 1 |
| • Purpose Setting | 0.5 |
| • Tower level Security | 1 |
| • Daily Email | 0.5 |
| • Training
(Spread across multiple days) | 8 |

Maid Attendance

[Home](#)

Activity

Time (Hrs)

- Staff Data Import 2
- E-Push Server Set up(Essl Biometric) 4
- Work location Mapping 1
- Training 8
(Spread across multiple days)

Inventory

[Home](#)

Activity

Time (Hrs)

- | | |
|---|-----|
| • Configuration – Unit/ Group | 0.5 |
| • Import Items & Balances | 1 |
| • Training
(Spread across multiple days) | 4 |

Online Payment

[Home](#)

Activity

Time (Hrs)

- | | |
|---|----|
| • Gateway API Integration | 32 |
| • Production Testing | 16 |
| • Training
(Spread across multiple days) | 4 |

*Precondition – Contract with Payment Gateway provider

Meter Integration

[Home](#)

Activity

Time (Hrs)

- | | |
|---|----|
| • Meter API Integration | 32 |
| • Reading & Balance | 8 |
| • Recharge API | 8 |
| • DG Sensing | 8 |
| • Start Stop | 8 |
| • Training
(Spread across multiple days) | 4 |

*Precondition – Meter Company has shared the API

PPM

[Home](#)

Activity

Time (Hrs)

- | | |
|---|---|
| • Upload PPM Schedule | 4 |
| • Setup & Configuration | 4 |
| • Training
(Spread across multiple days) | 4 |

*Precondition – PPM Calendar data shared

Asset Tagging

[Home](#)

Activity

Time (Hrs)

- Upload Asset Details 4
- QR Code Mapping in System 4
- Asset – QR Code Tagging (Physical- Client) 16
- Training 8
(Spread across multiple days)

*Precondition – Assets QR Codes Available

Survey

[Home](#)

Activity

Time (Hrs)

- Setup & Configuration
- Training
(Spread across multiple days)

4

4

Master Data Required

- Unit Number (Tower , Number)
 - Occupant Status(Owner, Tenant, Vacant)
 - Name
 - Primary Phone Number
 - Primary Email
 - Secondary Phone Number (Comma Separated)
 - Secondary Email (Comma Separated)
- To be repeated for Tenant if applicable

User Manuals and Links

[Home](#)

- Website Link
- iPhone App Store
- Google Play Store
- User Manual/ Help
- You tube channel

<https://isocietymanager.com/>

<https://apple.co/2EmjBrC>

<https://bit.ly/2YbX4Gx>

<https://bit.ly/2LWR7Xw>

<https://bit.ly/2JS6VrT>