PIE App
Business Requirements Document

Project Name: PIE App - Revamp
Date: 30 July 2025

1. Summary

The PIE App aims to enable seamless onboarding and lifecycle management of channel partners (individuals and entities) across India. This includes integrations with the website, mobile app, Salesforce (SFDC), and RMS, while ensuring regulatory compliance (e.g., RERA, GST) and operational efficiency.

2. Objectives

a. Digitally onboard channel partners via app or website.
b. Provide visibility and document management across Salesforce and RMS.
c. Maintain compliance with regional regulations (RERA).
d. Submit Lead, Track leads, site visits, and invoices.
e. Support parent-child user hierarchy within channel partner entities.

3. Onboarding process

a. Channel partners can initiate onboarding via:
   - Website form (link to download app)
   - Sign up on the App by providing KYC details and supporting documents
b. Required fields/documents: PAN, GST, RERA number(s), MSME declaration, cancelled cheque, vendor registration form.
c. Details/documents captured in sign-up form are sent to SFDC, where an account is auto created and a new user notification email is sent to respective regions channel partner team to verify and approve the account.
d. Post sign-up in App, CP can login into App with Mobile number and OTP. They will not be able to submit leads till their account is approved in Salesforce. They can only browse through the App.
e. Once approved, CP will get notification on App and email stating that now their account is ready for lead submission and other engagements through App.

4. Onboarding Approval process

a. Respective CP team will get email notification when a CP registers for their region.
b. CP team will access the registration details with the Salesforce link provided in the notification email.
c. Registration details will include the following
   i. Name
   ii. Country code
   iii. Mobile
   iv. Email

v. Company name
vi. RERA number
vii. RERA expiry date
viii. PAN
ix. GST
x. Cancelled Cheque
xi. MSME declaration
xii. Vendor Registration form inputs

d. After verifying the submitted information, CP team can approve or contact the respective CP if any further details are required to approve.
e. On approval, CP account details are sent to RMS/SAP for account creation
f. Every time a new RERA is approved, a new record is created in RMS/SAP as separate account or as related details or sub broker record.
g. Only parent accounts are created in RMS/SAP

5. Multi-region CP accounts

a. CPs can operate across multiple states.
b. Each state has unique RERA and GST
c. CP Account in Salesforce will have a related record called "RERA", which will hold details/documents related to each RERA.
d. CP can submit lead for a project only if their account is approved in Salesforce for the State where the project is located. CP master record admin will approve the CP account for a particular state when they receive all details for the respective State.
e. If Mr. X registers for the first time in CP App with Karnataka RERA/GST details and gets approved, he can submit lead only for projects that come under Karnataka RERA. If he wants to submit lead for Maharashtra project then he will have to submit all details again for Maharashtra and wait for approval. CP will have an option in the App to submit details for multiple States.

6. Account Duplication

a. CP account will never have duplicate record in Salesforce (Duplicate Mobile number)
b. Should we allow same RERA to be used by multiple accounts?
c. One account can be linked to multiple RERA, but can one RERA be linked to multiple accounts?

7. Parent-Child Hierarchy

a. Parent (entity admin) self-onboards and can add team members (children).
b. Children inherit RERA and access privileges of parent.
c. No separate onboarding for child users.

8. Lead Management

a. Channel partners can
    i. Register leads post-approval
    ii. Track status: Open, Qualified, Booked, Agreement Executed
    iii. View Activity logs from Lead and Opportunity
    iv. Apply personal tags (cold, follow-up, warm, hot) for own use.
b. Leads should be filtered by stage or tag.

9. Site Visit Scheduling

a. Channel partners can propose (schedule) site visits.
b. Final update/status managed by RM/Salesforce user.

10. Invoicing

a. Invoicing for a lead is applicable only when opportunity reaches Closed Won stage and Agreement status is "Executed".
b. When opportunity attains invoice eligibility, CP team gets an email notification to add brokerage percentage if not already defined at the project level.
c. On adding brokerage, CP gets notified in the App to submit invoice.
d. Lead that is eligible for invoicing gets categorized as "Invoice pending" and now has details of the applicable brokerage percentage and value.
e. CP can refer to the brokerage details and submit invoice.

11. Brokerage calculation

a. Brokerage can be defined at the project level and the same gets auto applied to all the leads of the project.
b. If not defined at the project level, same can be applied at the lead level individually whenever lead becomes eligible for invoicing
c. Brokerage percentages are defined for a Financial Year, if not changed than the same continues for all FYs
d. Brokerages are divided into multiple tiers.
    i. Eg. 2% brokerage for Tier 1, which is the default tier for all CPs
    ii. Above 100 converted leads become eligible for Tier 2 and brokerage increases to 3%
    iii. Increased brokerage becomes applicable to all the converted leads during the current financial year.
    iv. CPs get notified on Tier upgrade and each existing lead that is eligible for differential invoicing is updated to status "Add on Invoice". Leads converted post tier upgrade will carry updated brokerage value for invoicing at the status "Invoice Pending"

v. CPs can submit invoices for differential brokerage value against each eligible lead
vi. Likewise, there can be multiple tiers.

12. Invoicing

a. Invoice submitted in the App are stored as attachments under respective RERA record of the CP account in Salesforce
b. On invoice submission, Lead status is updated to “Invoice submitted”
c. Invoice requires verification and approval in Salesforce to send to RMS/SAP
d. Once invoice is approved, Lead status in App is updated to “Invoice Approved” and invoice is sent to RMS/SAP for processing payment.
e. When payment is processed fully or partially against an invoice, details are received in Salesforce and the same is sent to App. Lead status updated to “Partially Paid” or “Fully Paid”

13. Other Features in App

a. View Project details/Images
b. Download collaterals
c. Target setting
d. Target v/s Actuals tracking
e. Raise service ticket (Creates case in Salesforce and gets assigned to respective CP SPOC)