PSM - RERA Compliant CRM for Realty
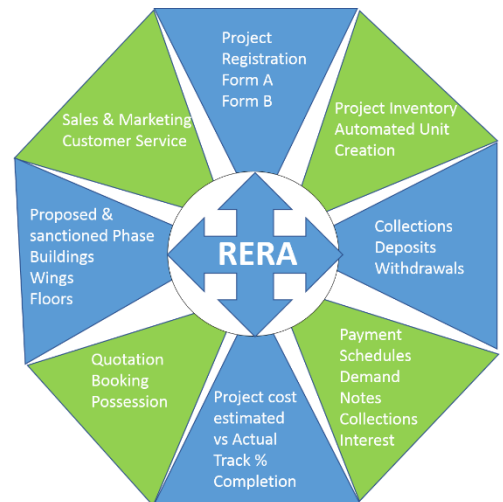
Microsoft Dynamics 365

Regulatory Compliance is moving fast.
How will you cope up?

In the recent past customer behaviour and regulatory compliance has changed drastically. Customers are becoming harder to attract and the competitive environment has significantly impacted the stakeholder expectations.

Given the recent **RERA** norms, it is imperative for the Realty companies to maintain not only detailed Project, financial & customer information but also automate business processes to adhere to the compliance deadlines. There is an urgent need to shift from the product centric approach to stakeholder centric including Customers, Regulators and Real Estate Agents.
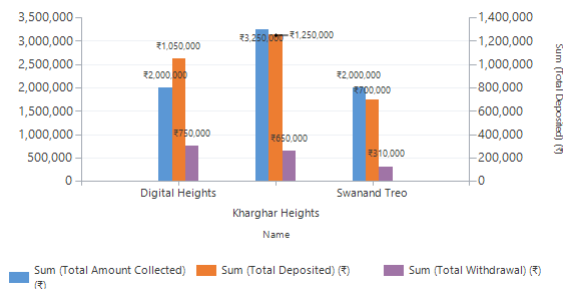
Project Summary

PSM supports this new journey for realtors and provides rich functionality which accurately records and enables the key business processes

- RERA Project Registration – Form A , B
- Detailed Inventory definition
- Automated Payment Schedules
- Quotations and bookings with minimum data entry
- Collections with demand notes & reminders
- Receipts and Interest calculation
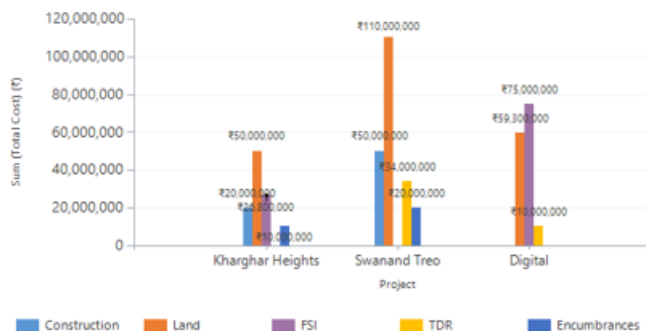- RERA compliance for Deposits & Withdrawals
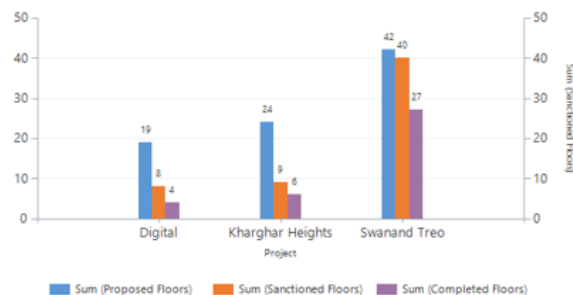
Project Wise Totals
Active Project

Legend: Sum (Total Amount Collected) (₹) | Sum (Total Deposited) (₹) | Sum (Total Withdrawal) (₹)

Total Cost by Cost Type
Active Land Cost

Legend: Construction | Land | FSI | TDR | Encumbrances

Project Wise Propose,Sanctioned,Complete Floors
Active Wing

Legend: Sum (Proposed Floors) | Sum (Sanctioned Floors) | Sum (Completed Floors)

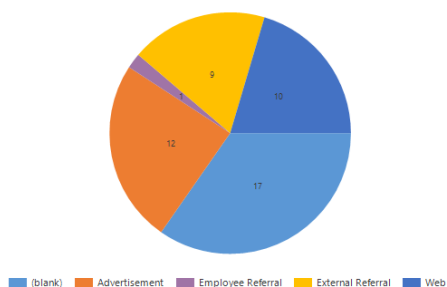| FEATURE SUMMARY |
| --- |
| **RERA Compliance** |
| Project Registration – Form A , Form B |
| Detailed Project Cost Components including Encumbrances |
| Track Proposed Vs Sactioned Phases, Building/Wings, Floors |
| Project Estimated and Actual Cost |
| Track and certify Project completion status and cost |
| Collections, Deposits and Withdrawal Management |
| Enforce Payment Schedules |
| Maintain Document Repository such as Land Title, Agreements etc |
| Maintain and Track Project Inventory and Amenities |
| **Sales & Marketing Management** |
| Maintain leads from various sources |
| Qualify leads to opportunities |
| Guided Processes for opportunities management through their lifecycle and stages |
| Create Quotes and customised offers |
| **Project Inventory** |
| Define detailed hierarchy – Project/Phase/Building/Wings |
| Automated Unit creation including carparks |
| Automated Payment schedules linked to construction stages |

Sales Pipeline
Open Opportunities

Legend: 1-Qualify | 4-Visited With Family | 6-Quotation | 3-Scheduled Visit
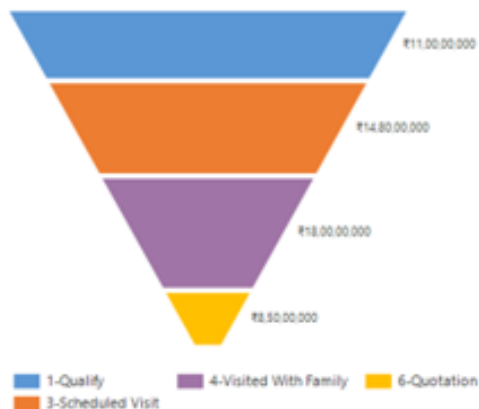
Leads by Source
All Leads

Legend: (blank) | Advertisement | Employee Referral | External Referral | Web

Inventory Tracking Sold vs Unsold
Booking and Possession
Booking with minimum data entry
Automated payment schedules
Workflow based possession mandating key criteria
Register of key dates and events
Receipts and Interest
Receipts with allocation details
Interest statement generation
Demand notes and reminders
Customer Care
Case Management
Interaction History
Service Agent performance tracking
Inquiries, complaints and Requests
Other
Activity management (emails, todo's, appointments,)
Reporting with real-time dashboards
Outlook integration
Social Engagement

Building Wise Outstanding

Active Payment Schedule by Property Charge Type
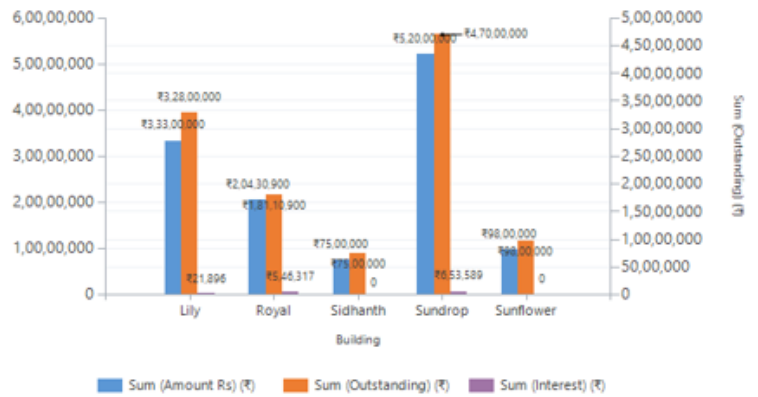
PROVEN EXPERTISE IN REALTY SOLUTIONS

 The promoters have over 10 years of experience in providing Real Estate CRM solutions. Some of the leading Realty companies continue to leverage the legacy PSM and have transacted millions of Sqft. of real estate on this solution.

Leveraging the power of Microsoft Dynamics 365 and given the functional maturity of PSM, our solution provides the right platform to compete effectively and comply accurately.