

PSM RERA

- Project Inventory
- Marketing and Sales
- Bookings, Demand Notes, Payment Reminders
- Collection, Customer Ledgers, Interest statements
- RERA Compliance

Real Estate CRM and Sales Recovery solution built on Microsoft Dynamics 365/Powerapps



Microsoft
Dynamics® 365

TRENDS

RAPID CHANGES IN THE REALTY SECTOR

Marketing Strategy

Luxury or Affordable
housing

KPIs

Compliance



CHALLENGES

RAPID CHANGES IN THE REALTY SECTOR

- *Regulatory Compliance*
- *Increased Competition*
- *Excess Inventory*
- *Financial Institutional Risk Monitoring*

What Got you Here

*Increased Competition
Excess Inventory
Shrinking Margins
Regulatory Compliance*

means **Greater Focus** on

*Operational Efficiency,
Automation in processes
Enhanced Sales force
Productivity tools*

..... **Won't Get you There**



MODULES

PSM RERA

REAL ESTATE CRM & SALES RECOVERY
SYSTEM ON MICROSOFT
DYNAMICS/POWERAPPS PLATFORM

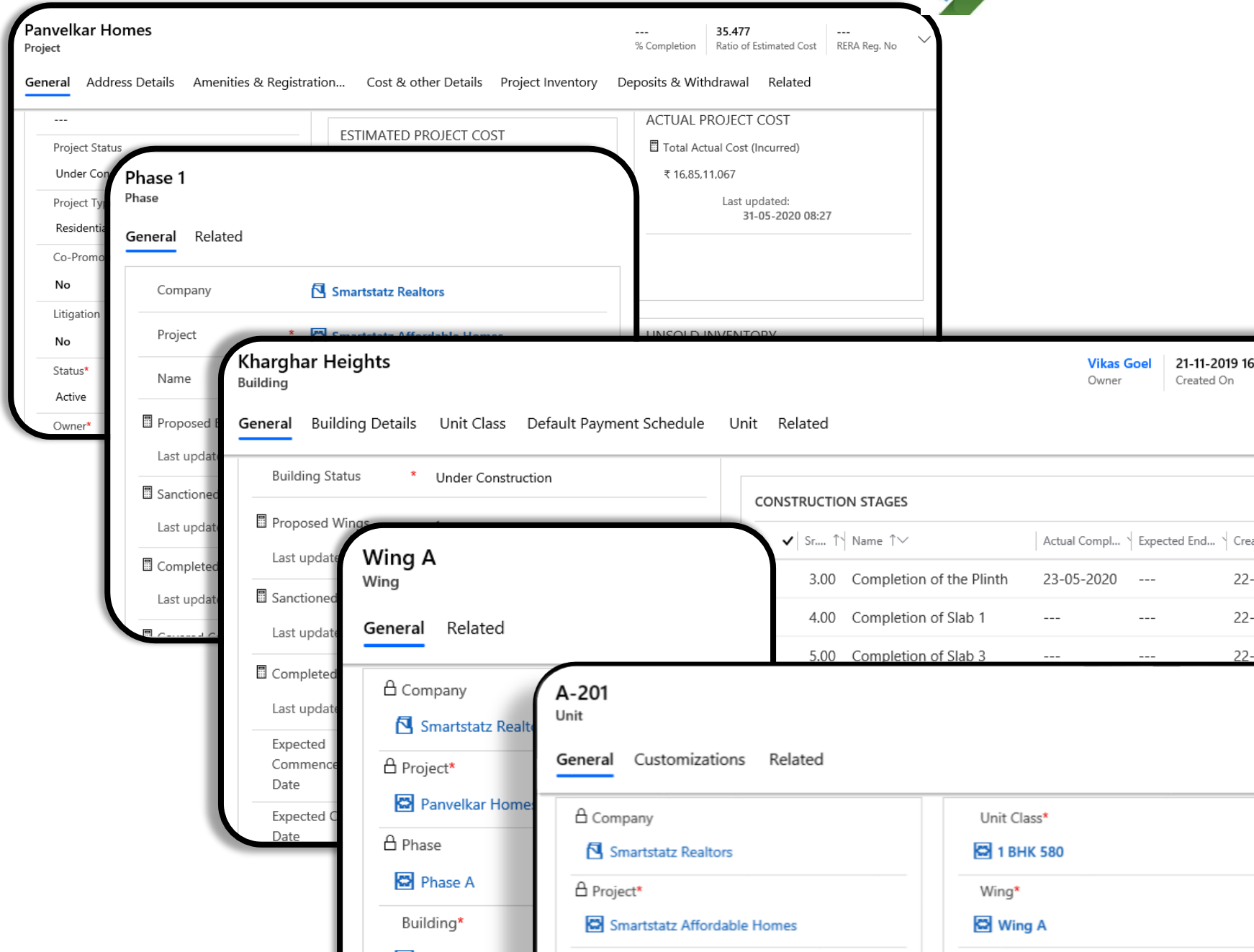
- **Automated Workflows**
- **Email Integration**
- **Email Templates**
- **Track follow-ups and Site Visits**
- **Interactive Dashboards and Reports**
- **Customer portal**
- **Broker Portal**
- **Mobile App**
- **Comprehensive Security**



INVENTORY

EFFECTIVELY MANAGE YOUR INVENTORY ACROSS PROJECTS AND COMPANIES

- Define Inventory of all units such as flats, shops, Car-parks in a Hierarchical manner
- Define RERA area and loading premiums
- Floor wise loading, Vaastu premium calculated automatically



The screenshot displays the Smartstatz inventory management interface, showing a hierarchical view of projects, buildings, wings, and units. The interface is organized into several panels and sections:

- Panvelkar Homes Project:** This panel shows the project status, under construction, project type, residential, co-promoter, litigation, status (Active), and owner (Vikas Goel). It also displays the estimated project cost (₹ 16,85,11,067) and the actual project cost (₹ 16,85,11,067).
- Phase 1 Phase:** This panel shows the phase status, under construction, project type, residential, co-promoter, litigation, status (Active), and owner (Vikas Goel). It also displays the estimated project cost (₹ 16,85,11,067) and the actual project cost (₹ 16,85,11,067).
- Kharghar Heights Building:** This panel shows the building status (Under Construction), proposed wings, sanctioned wings, completed wings, and owner (Vikas Goel). It also displays the estimated project cost (₹ 16,85,11,067) and the actual project cost (₹ 16,85,11,067).
- Wing A Wing:** This panel shows the wing status, under construction, project type, residential, co-promoter, litigation, status (Active), and owner (Vikas Goel). It also displays the estimated project cost (₹ 16,85,11,067) and the actual project cost (₹ 16,85,11,067).
- A-201 Unit:** This panel shows the unit status, under construction, project type, residential, co-promoter, litigation, status (Active), and owner (Vikas Goel). It also displays the estimated project cost (₹ 16,85,11,067) and the actual project cost (₹ 16,85,11,067).

The interface includes various tabs and filters to manage the inventory, such as General, Address Details, Amenities & Registration, Cost & other Details, Project Inventory, Deposits & Withdrawal, and Related. It also features a sidebar with filters for Project Status, Under Construction, Project Type, Residential, Co-Promoter, Litigation, Status, and Owner.

BOOKING

LEAD TO BOOKING

- **Convert Leads to Quotes and quotes to bookings at a click of a button**
- **Payment Milestones linked to construction stages created automatically**
- **Multiple pre-defined templates including RERA enforced payment schedules**

LD-000096
Lead · Information ▾

--- Estimated Budget Booked Lead Status

General Leads Details Quote Related

Lead Id*
LD-000096

Contact Info
Viren Shah

Broker
Smartstatz Realty

Agent
Abha Singh

Capture Summary

Timeline
+ ▾ ⋮
Search timeline
Enter a note...

Unit Class
2 BHK 939

Unit

QUO-1078
Quote

General Payment Schedule Other Details Related

Payment Schedule Type
Step-Up

Property Charge type ▾
✓ Sr... ↑ Name ▾
1.00 On Booking

Saleable Area (Sq ft) 939.00

Rate Agreed (Sq ft) ₹ 12,60

Total Price ₹ 1,1

Total GST Property ₹ 5,9

Total GST Other ₹ 2,7

Total Schedule % 100.0

Total Schedule Price ₹ 1,1

UBN-1027
Unit Booking

₹ 11,73,75,000
Total Price

Booking to Possession Pr...
Active for 5 months

Payments & Check List (5 Mo)

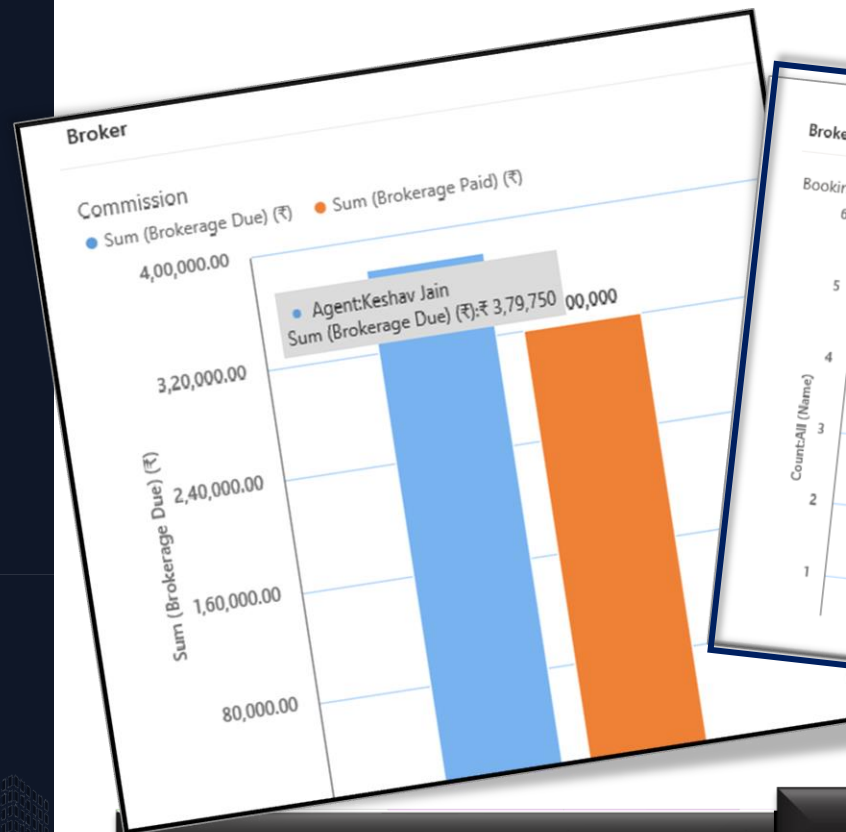
General Price Summary Loan Channel Partner Det... Payment Schedule Receipt Interest Other Det...

Active Payment Schedule - Property Charge Type - unit booking form ▾

✓	Sr... ↑	Name ▾	Charge Type ▾	Amount % ▾	Total Amount ▾	Payment Rec...	Outstanding ▾
	1.00	On Booking	Property	10.00	₹ 1,17,37,5...	₹ 28,25,000	₹ 89,12,500
	2.00	Execution of Agreement	Property	10.00	₹ 1,17,37,5...	---	₹ 1,17,37,5...
	3.00	Completion of the Plinth	Property	10.00	₹ 1,17,37,5...	---	₹ 1,17,37,5...
	4.00	Completion of Slab 1	Property	5.00	₹ 58,68,750	---	₹ 58,68,750
	5.00	Completion of Slab 2	Property	5.00	₹ 58,68,750	---	₹ 58,68,750

BROKER MANAGEMENT

- *Real time Commission Calculations*
- *Broker Payment management*
- *Self –Service portal and mobile App for agents to enter leads, view commissions etc.*



[Home](#)
[Partner Program](#)
[Support](#)

[Leads and Bookings](#)
[Leads](#)
[Bookings](#)
[Support](#)

[Abhijit Pande](#)

[Sign in](#)
[Register](#)
[Redeem invitation](#)

Sign in with a local account

☐ Remember me?

[Sign in](#)
[Forgot your password?](#)

Sign in with an Azure AD account

[Azure AD](#)

[Active Leads](#)

[Create a New Lead](#)

Lead Id	Mobile Phone (Contact)	Email (Contact)	Lead Source	Campaign	Lead Status	Created On	Mobile Number	Phone Number	Location Preference	Current Residence Ownership	Estimated Budget
LD-000100			Channel Partner		Followup	5/20/2020 1:54 AM				Active	
LD-000102					Followup	5/20/2020 2:20 AM				Active	
LD-000117			Channel Partner		Disqualified	5/21/2020 5:25 PM	88006618517		Kandivali	Active	

RCP-1049

Transaction

Received

Transaction Type

Vikas Goel

Owner

27-01-2020 22:33

Created On

Confirmed

Status Reason

General Receipts Allocation Related

Receipt Number

RCP-1049

Receipt Date

27-01-2020

Client Name*

Jairaj Sinha

Unit Booking*

UBN-1048

Unit

A-104

Company

INT-1081

Interest

Vikas Goel

Owner

27-01-2020 22:35

Created On

General Related

Name*

INT-1081

Company

Smartstanz Realtors

Project

Panvelkar Homes

Phase

Phase A

Building

Kharghar Heights

Details

Client Name

Jairaj Sinha

Unit Booking

UBN-1048

Total Price

₹ 1,14,08,85

Payment Sch

GST-On

Amount Du

₹ 57,044

No Of Days

65

Date : 31 May, 2020

Version-1.1 Date-7 Apr 2018

Interest Statement

Unit Booking ID	UBN-1027	KSR No.	
Project	Panvelkar Homes	Flat No.	A-1003
Building	Kharghar Heights	Flat Price	₹ 11,73,75,000
Owner	Sai kerkar	Booking Date	01-11-2018
Booking Status	Booked	Update Interest Date	12-03-2020

Description	Due On	Paid On	Days	Amount Due	Amount Paid	Interest Rate	Total Interest	Interest Received
On Booking	16-11-2018	06-12-2018	20	₹ 1,17,37,500	₹ 1,50,000	10.95	₹ 70,425	₹ 0
ST-On Booking-property	16-11-2018	06-12-2018	20	₹ 5,86,875	₹ 50,000	18.00	₹ 5,788	₹ 0
On Booking	06-12-2018	05-03-2019	89	₹ 1,15,87,500	₹ 20,00,000	10.95	₹ 3,09,386	₹ 0
On Booking	05-03-2019	12-03-2020	373	₹ 95,87,500	₹ 0	10.95	₹ 10,72,841	₹ 0
ST-On Booking-property	06-12-2018	12-03-2020	462	₹ 5,36,875	₹ 0	18.00	₹ 1,22,319	₹ 0
Execution of agreement	16-11-2018	12-03-2020	482	₹ 1,17,37,500	₹ 0	10.95	₹ 16,97,243	₹ 0
ST-Execution of agreement-property	16-11-2018	12-03-2020	482	₹ 5,86,875	₹ 0	18.00	₹ 1,39,499	₹ 0
On Booking	05-03-2019	02-05-2020	424	₹ 95,87,500	₹ 2,00,000	10.95	₹ 12,19,530	₹ 0
ST-On Booking-property	06-12-2018	02-05-2020	513	₹ 5,36,875	₹ 1,15,000	18.00	₹ 1,35,822	₹ 0
Total							₹ 47,72,853	₹ 0

Page 1

GST MANAGEMENT

DIFFERENT GST AND INTEREST RATES BY PROJECT AND CHARGE TYPE

- Enter Receipts with automated distribution to GST
- Print Receipts
- Generate detailed Interest statements

Receipt No. RCP-1022 Date : 05-03-2019

RECEIPT

RECEIVED WITH THANKS FROM MR./MRS./MS. Sai kerkar

THE SUM OF RUPEES ₹ 20,00,000/- (Twenty Lakh)

BY CASH / CHEQUE / DRAFT / NEFT / SWIFT NO. - DATED 05-03-2019 DRAWN ON -

BEING AND RECEIVABLE TOWARDS

Property ₹ 20,00,000

IN PART / FULL PAYMENT / ADVANCE / BOOKING INSTALLMENT AGAINST BUILDING Kharghar Heights

IN WING Wing A FLAT NO. /SHOP NO. A-1003 ON Floor 10

IN PROJECT KNOWN AS " Panvelkar Homes "

Completion of the Plinth

Construction Stage

General Demand Letters Related

DEMAND LETTER

✓ Name ↑ Unit Booking ↓ Building ↓ Construction...

DML-1999 UBN-1030 Kharghar Heigl Completion

DML-1999 UBN-1032 Kharghar Heigl Completion

Date : 31 May, 2020

Panvelkar Homes
Thane (M Corp.) Maharashtra India
GSTIN/UID:

Demand Letter

To.
Joy Sinha

Ref:

Flat No. :A-1005 Building :Kharghar Heights

Subject :Instalment.

Dear Sir / Madam

It is our privilege to have you as our customer. You have booked the above mentioned flat in "Homes" at Thane (M Corp.).

Please find enclosed a Tax invoice of ₹17,39,216 We request you to kindly pay this amount outstanding sum (listed below) within 15 Days from the date hereof to avoid interest charge which we receive your cheque will be taken into consideration for determining the interest p The interest will be charged at 12 % p.a.

Please find below the list of outstanding payments

Paticulars	Due Date	CGST %	SGST %	ITC %	Amount Due	Outstanding Amount	Amount Received
On Booking	05-01-2020				₹ 10,56,375	₹ 10,56,375	₹0
GST-On Booking-Property	05-01-2020	2.50	2.50	0.00	₹ 52,819	₹ 52,819	₹0
Execution of Agreement	05-01-2020				₹ 4,56,354	₹ 4,56,354	₹0
GST-Execution of Agreement-Property	05-01-2020	2.50	2.50	0.00	₹ 22,818	₹ 22,818	₹0
Completion of	09-04-2020	0.00	0.00	0.00	₹ 5,28,188	₹ 5,28,188	₹0

VG

Email from Vikas Goel

Second Payment Reminder for Kharghar Heights- A-1002

Dear Abhijit Pande ,

We have to inform you that an amount of ₹ 25,79,475 , excluding interest if any, towards the Property payable on the amounts demand / paid by you as on date is

Please pay the above amounts at the earliest.

Regards,

Smartsta

Closed

VG

Email from Vikas Goel

First Payment Reminder for Kharghar Heights - A-1002

Dear Abhijit Pande ,

We have to inform you that an amount of ₹ 25,79,475 , excluding interest if any, towards the Property payable on the amounts demand / paid by you as on date is overdue/due for payment.

Please pay the above amounts at the earliest.

Regards

Closed

29-04-2020 17:47

AUTOMATED PAYMENT FOLLOWUPS

STAY ON TOP OF YOUR
RECOVERIES

- Generate bulk Payment demand letters
- Automated follow-ups sent via Email

Panvelkar Homes

Project

% Completion

35.477

Ratio of Estimated Cost

RERA Reg. No

General

Address Details

Amenities & Registration...

Cost & other Details

Project Inventory

Deposits & Withdrawal

Related

<div>Company*</div> <div>Smartstatz Realtors</div>	<div>Expected Commencement Date</div> <div>02-02-2017</div>	<div>Actual Start Date</div> <div>01-03-2017</div>
<div>Name*</div> <div>Panvelkar Homes</div>	<div>Expected Completion Date</div> <div>30-12-2020</div>	<div>Actual End Date</div> <div>---</div>

LAND & CONSTRUCTION COST

✓	Description	Est. Amount
	Staircase (Other Charges...	₹ 71,91,968
	Infrastructure improveme...	₹ 31,14,650
	Fire Premium Charges S....	₹ 8,08,947
	Fire Infrastructure charge...	₹ 17,07,574

UNIT CLASS

✓	Name	Class Type	Total No...	Booked...	Project	Bui
	2 BHK 939	Residential	90	32	Panvelkar Hom Kh	
	3BHK 1500					
	CCP-Stilt					

DOCUMENTATION

✓	Document id	Project	Description	Document Ty...
	TITLE-7	Panvelkar Hom	Building Pl...	Developm...
	TITLE-8	Panvelkar Hom	Copy of th...	Land Title

STAKEHOLDERS

✓	Stakeholder id	Parent Accou...	Name	Role
	STA-1	HDFC	HDFC Thane	Bank
	STA-4			
	STA-6			
	STA-5			

LITIGATION DETAILS

✓	Name	Case Number	Court Name	Petition Name
	LTG-1	CS0067456	---	---

RERA COMPLIANCE

Stay RERA Compliant

- Real time updates of RERA required Information
- Automated followups sent via Email

DEPOSITS

✓	Transaction...	↑	Amount	↓	Date
	DEP101		₹ 4,90,000		01-07-20
	DEP105		₹ 7,00,000		10-05-20
	DEP110		₹ 6,30,000		26-11-20

WITHDRAWAL

✓	Transaction...	↑	Amount	↓	Total Withdra...	Total Deposit...	Maximum W
	WDL-10		₹ 5,00,000		₹ 23,00,000	₹ 99,05,000	₹ 16,85,11
	WDL-11		₹ 5,00,000		₹ 28,00,000	₹ 1,03,25,0...	₹ 16,85,11
	WDL-12		₹ 4,00,000		₹ 33,00,000	₹ 1,35,80,0...	₹ 16,85,11

Panvelkar Homes

Deposit And Withdrawal Statement

Total Amount Collected	₹ 2,42,01,000	Total Deposited
Max Wdrl Amount	₹ 16,85,11,067	Total Withdrawal

Deposits Details

Deposit No.	Deposit Date	Deposit Amount	Receipt No.	Receipt Date	Receipt Amount
DEP111	03-02-2018				
DEP121	25-02-2018				
DEP112	01-04-2018				
DEP105	10-05-2018				
DEP113	30-05-2018				
DEP101	01-07-2018				
DEP114	06-12-2018				
DEP115	05-03-2019				
DEP126	05-03-2019				

Wdrl No.	Wdrl Date	Wdrl Amount	Withdrawal Eligibility CA Cert
WDL-10	02-02-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-11	16-02-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-12	19-02-2020	₹ 4,00,000	₹ 26,66,55,530
WDL-13	07-03-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-14	12-03-2020	₹ 9,00,000	₹ 26,66,55,530
WDL-15	16-03-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-16	18-03-2020	₹ 50,00,000	₹ 26,66,55,530
WDL-17	19-03-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-18	18-04-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-19	23-05-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-20	30-05-2020	₹ 5,00,000	₹ 26,66,55,530
WDL-3	15-04-2019	₹ 1,50,000	₹ 26,65,05,530
WDL-4	20-04-2019	₹ 3,50,000	₹ 26,61,55,530
WDL-5	20-12-2019	₹ 2,00,000	₹ 26,59,55,530

The Asst. General Manager
HDFC

WDL-10

Dear Sir,

Sub: Withdrawal from the designated bank account under RERA
Amount to be withdrawn : ₹ 5,00,000 /-

As per the regulations of RERA we have the following bank accounts with you for our project at Panvelkar Homes:

100% collection account	01462320777726
70% RERA designated account	50211025763780
30% account	50211225768667

We are attaching here with the Chartered Accountant's Certificate, Form - 3, dated 05-04-2019, issued by A & M Group of Companies according to which we are eligible to withdraw the above stated amount from the designated bank account being operated as per the regulations of RERA.

Eligibility for withdrawal from Designated Account	₹26,66,55,530
Amount Withdrawn from Designated Account till date	₹23,00,000
Balance eligibility for withdrawal	₹26,43,55,530
Request for withdrawal from designated account by this letter	₹5,00,000
Balance Eligibility after this withdrawal	₹26,38,55,530

Accordingly, you are requested to kindly transfer the amount of ₹ 5,00,000/- from Account No. 50211025763780 to Account No. 50211225768667 and oblige.

₹26,43,55,530	₹26,43,55,530	05-04-2019	01-04-2019
₹25,40,55,530	₹51,03,700	05-04-2019	01-04-2019
₹26,65,05,530	₹38,26,000	05-04-2019	01-04-2019
₹26,61,55,530	₹34,76,000	05-04-2019	01-04-2019
₹26,59,55,530	₹72,45,000	05-04-2019	01-04-2019

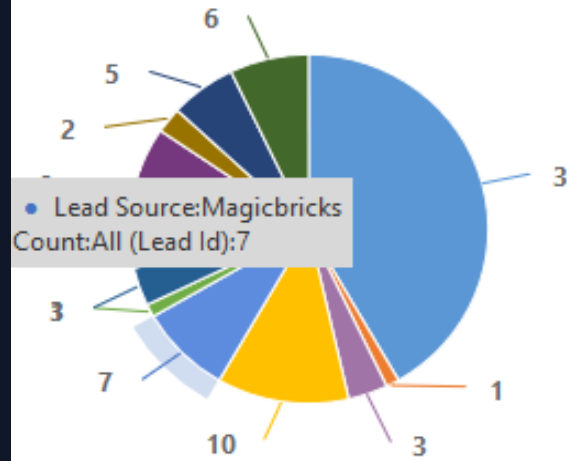
RERA COMPLIANCE

MANAGE COLLECTIONS AND WITHDRAWALS AS PER RERA

- Automated bifurcation into 70:30 accounts
- Generate withdrawal letters as per latest CA certificates

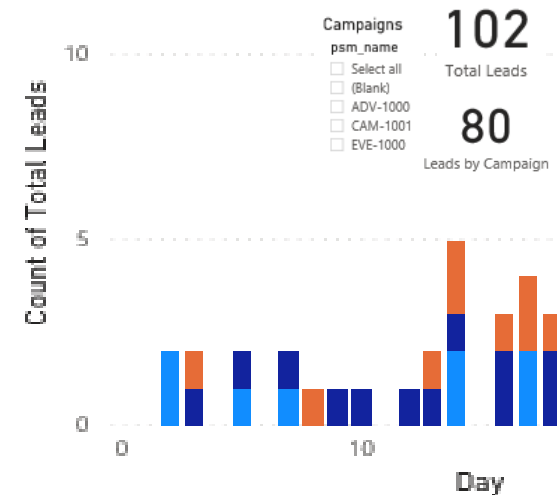
RICH ANALYTICS

- Campaign ROI
- Lead Velocity by Campaign
- Leads by Source
- Scheduled Site Visits
- Lead Follow-ups



Count of Total Leads by Day and psm_name

psm_name ● ADV-1000 ● CAM-1001 ● EVE-1000

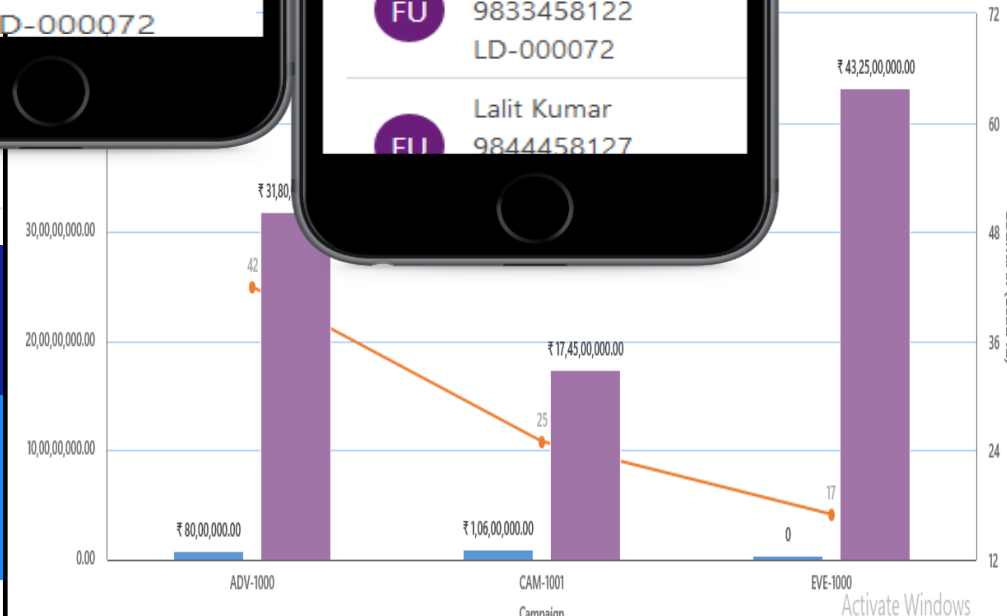


Sales Site Visit Schedul...

SV	Rajeev Gupta LD-000069 9833458127
SV	Rajesh Mishra LD-000070 9833458189
SV	Abha Singh LD-000071 9833458122
SV	Lalit Kumar LD-000073 9844458127
SV	Dinesh Shastri LD-000072

Sales Followup-All

FU	Rajeev Gupta 9833458127 LD-000069
FU	Rajesh Mishra 9833458189 LD-000070
FU	Abha Singh 9833458122 LD-000071
FU	Dinesh Shastri 9833458122 LD-000072
FU	Lalit Kumar 9844458127



FEATURES SUMMARY

PSM RERA

REAL ESTATE CRM & SALES
RECOVERY SYSTEM ON
MICROSOFT
DYNAMICS/POWERAPPS
PLATFORM

FEATURE SUMMARY			
Sales & Marketing Management	Project Inventory	Receipts and Interest	RERA Compliance
Maintain leads from various sources	Define detailed hierarchy – Project/Phase/Building/Wings	Receipts with allocation details	Project Registration – Form A , Form B, CA certificate, Architect's certificate
Qualify leads to opportunities	Automated Unit creation including carparks	Interest statement generation	Detailed Project Cost Components including Encumbrances
Guided Processes for opportunities management through their lifecycle and stages	Automated Payment schedules linked to construction stages	Demand notes and reminders	Track Proposed Vs Sactioned Phases, Building/Wings, Floors
Create Quotes and customised offers	Inventory Tracking Sold vs Unsold	Create Quotes and customised offers	Project Estimated and Actual Cost
Customer Care	Booking and Possession	Other	
Case Management	Booking with minimum data entry	Activity management (emails, todo's, appointments,)	Collections, Deposits and Withdrawal Management
Interaction History	Automated payment schedules including RERA mandated milestones	Reporting with real-time dashboards	Enforce Payment Schedules
Service Agent performance tracking	Workflow based possession mandating key criteria	Outlook integration	Maintain Document Repository such as Land Title, Agreements etc
Inquiries, complaints and Requests	Register of key dates and events		Maintain and Track Project Inventory and Amenities



Thank You

Vikas Goel

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