



Site Sales Admin System

Broker Training Manual

Version 5
Wednesday, 14 December 2016

Background

As one of Persimmon's nominated brokers you play an important part in the sales process of each of our homes. This document explains the steps required of you to ensure that the process is as quick and efficient as it can be for both parties.

The URL is crm.persimmonhomes.com/Brokers/signIn and you will require a password.

Procedure for existing Brokers

Enquiry e-mails will be sent to you as normal. When you click the link, you will automatically be logged into the Dashboard. You will need to select the 'Account' tab and create a password. If you omit to do this and click the link in the e-mail again, you will be directed to the login screen where you can click 'Forgotten Password' and a new password will be sent to you.

Procedure for new Brokers

When new Brokers are added to the system an e-mail is generated and sent with a password and login details.

Data Protection

SAS is a securely hosted, powerful online system that contains the contact details of existing prospects. The password must conform to data protection best practice, so please do not leave login details and passwords in the office.

Confirmation Email

**PERSIMMON**
Together we make a home

From: Karen Castle
karen@designamite.co.uk

Dear Karen Castle

As one of our selected brokers, you must acknowledge receipt of this email within 24 hours, and schedule an appointment or phone call with the client ASAP.

Personal Details

Name	Mrs Kathrine Sarah Preece
Email address	kathrine.preece@btinternet.com
Mobile telephone number	07855966842
Day telephone number	01603 667081
Address line 1	Flat 2
Address line 2	17 Unthank Road
City	Norwich
County	Norfolk
Postcode	NR2 2PA
Investor	No

Specific Interests

Brand	Persimmon Homes
Region	Anglia
Development	Bluebell Meadow
Plot interest(s)	Plot 005, 3 Bed Mid Terrace House, £179,950

Further details about the prospect are available online.

Confirmation

You must acknowledge receipt of this email

Confirm ¹

Schedule or Amend

To schedule/amend an appointment or phone call

Schedule ²

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When a Sales Advisor from the Persimmon group of companies has a customer that requires a Broker, you will receive an email, similar to above, containing the customer details. You will also be able to view the enquiry on your dashboard (See Page 4).

- 1** Select 'Confirm' to acknowledge receipt of the email.
- 2** Select 'Schedule' to schedule or amend an Appointment/Phone call.

Dashboard Overview

Enquiries - Sales Admin System

https://crm.persimmonhomes.com/Brokers/dashboard/enquiries

Logged in as: Karen Castle | Logout

Dashboard | Prospects | Open Times | Account

Tasks: You have 1 overdue appointment, 7 overdue actions.

Enquiries

Show below are your enquiries. Use the search panel to filter and click on the **Edit** link next to them to view and update.

Enquiries | Reservations

First Name: Enter first name
Surname: Enter surname
Region: All
Development: All
Status: Followed up
Show All in Company: No

Clear Search

Your Results

Show: 10 1 - 1 of 1 results

Enquiry Date	Lead Name	Brand	Region	Development	Plot / Price (where known)	Qualified?	Status	
27/01/14	Mrs Karen Jenkins	P	Designamite 1	Designamite Persimmon	002, £159,995		Followed up	Edit

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The Dashboard is where you manage your Enquiries and Reservations.

- 1 Your name is displayed in the top right corner. You can Logout from here.
- 2 Tasks - these are your tasks, including overdue actions. Click the links to view details.
- 3 Enquiries tab - loads by default and contains all referrals (sent by email).
- 4 Reservations tab - contains your Reservations and Key Dates.
- 5 Prospects tab - Search/edit/create prospects.
- 6 Open Times tab - your firm's business hours, amendable by managers/regional admins and broker.

Dashboard - Enquiries

Enquiries

Shown below are your enquiries. Use the search panel to filter and click on the **Edit** link next to them to view and update.

1 Enquiries Reservations

2 First Name Surname
Enter first name Enter surname

Region Development
All All

Status Show All in Company
All No

Clear Search

Your Results

Show: 10 1 - 10 of 17 results **1** 2 Next Last »

4

Enquiry Date	Lead Name	Brand	Region	Development	Plot (Price)	Qualified?	Status 5	6
11/02/14	Mrs Karen Castle	P	Designamite 1	Designamite Interspire	? (£?)		Confirmed	Edit
27/01/14	Mrs Karen Jenkins	P	Designamite 1	Designamite Persimmon	002 (£159,995)		Confirmed	Edit
27/01/14	Mrs Karen Jenkins	P	Designamite 1	Designamite Persimmon	001 (£?)		Confirmed	Edit
15/01/14	Mrs Karen Castleton	P	Designamite 1	Designamite Persimmon	001 (£?)	Yes	Completed	Edit
15/01/14	Mrs Karen Test	P	Designamite 1	Designamite Persimmon	001 (£156,666)	Yes	Completed	Edit
15/08/13	Castle	P	Designamite 1	Designamite Persimmon	123 (£200,000)	Yes	Completed	Edit
13/08/13	Mrs Karen Castles	W	Designamite 1	Designasite	110 (£200,000)	Maybe	Completed	Edit
13/08/13	Castle	H	Designamite 1	Designasite	123 (£159,995) 133 (£169,995)	Yes	Completed	Edit
13/08/13	Mrs Karen Castles	H	Designamite 1	Designasite	111 (£199,995)	Yes	Completed	Edit
26/06/13	Mr Castle Castle-Castle	C	Designamite 1	Designamite Charles Church	123a (£123,995)	Maybe	Completed	Edit

Show: 10 1 - 10 of 17 results **1** 2 Next Last »

- 1** The Enquiries tab is where you manage your referrals.
- 2** Filter by Name, Region, Development or Status.
- 3** Show all in Company - by default, only Enquiries linked to your login are shown. You can view all Enquiries linked to your Company by selecting 'Yes' in the drop down.
- 4** Enquiries are displayed in date order (most recent first). Overdue actions appear in red.
- 5** Status is the current status of the Enquiry.
- 6** Select 'Edit' to view, update and/or remove the Enquiry. Use this to confirm receipt of the enquiry if you have not already done so via email.

Dashboard - Enquiry Removal

The screenshot displays a web browser window titled 'Sales Admin System' with the URL <https://crm.persimmonhomes.com/Brokers/appointment/28942/a139f682214f4b0487a4046120ce92db>. The interface is divided into two main sections. The top section contains a form with the following fields: 'Does the customer qualify for a mortgage?*' (dropdown menu with 'Yes' selected), 'Status*' (dropdown menu with 'HTB' selected), 'Max. Property Price (£)*' (text input field), and 'Sales Scheme*' (dropdown menu with 'Help to Buy (1)' selected). A green 'Update' button is located to the right of these fields. Below this is a 'Remove Enquiry' section. It features a 'Remove' button (labeled with a red circle and the number 1) and a red error message box (labeled with a red circle and the number 2) that reads: 'You cannot remove an enquiry without adding a reason.' Below the error message is a 'Reason' text area. At the bottom of the 'Remove Enquiry' section is a red 'Remove' button.

Does the customer qualify for a mortgage? *

Yes

Status *

HTB

Max. Property Price (£) *

Sales Scheme *

Help to Buy (1)

* Indicates a required field

Update

Remove Enquiry

Remove

2

You cannot remove an enquiry without adding a reason.

Reason

1

Remove

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In the event the enquiry is no longer proceeding with you, it can be removed from your list of actions.

- 1 Click 'Remove' to confirm removal of Enquiry
- 2 A reason must be given to complete the removal

Removing the appointment means it will no longer appear in the Enquiries tab or Overdue Tasks..

Receipt Confirmed & Schedule Appointment/Call

Details

1 Referral Details

Date

Brand

Region

Development

27/01/2014

Persimmon Homes

Designamite 1

Designamite Persimmon

Plot(s)

Deposit

Source

Plot 002, 1 Bed 3 Storey House, £159,995

£1,234

Website Direct Enquiry

2 Site Contact Details

Development Contact:

Karen Castle, bluebellmeadow.angl@persimmonhomes.com / 07587 039435

3 Personal Details

Mrs Kathrine Sarah Preece

Tel - Mobile

Address

kathrine.preece@btinternet.com

07855966842

Flat 2

17 Unthank Road

Norwich

Norfolk

NR2 2PA

United Kingdom

Customer Situation

Tel - Day/Work

Non-Dependant - Other

01603 667081

Investor

Tel - Evening/Home

No

Missing

4 General Interests

Price Range

Bedrooms Required

£ 90,000 - £90,000

2 bed, 3 bed

Style of Property

Timescale For Purchase

Semi-Detached, Bungalow

Under 3m

Sales Schemes

Part Exchange, Help to Buy (2)

Schedule an Appointment/Phone Call

Use the box below to schedule an appointment/phone call.

Schedule

Date (dd/mm/yyyy) *

Hour *

Minute *

dd/mm/yyyy

--

--

* Indicates a required field

Schedule

Comments

+ Add

Persimmon Homes, Anglia, Bluebell Meadow

Added by Karen Castle, Designamite Ltd. on 07/04/2015

Karen Castle confirmed receipt of email.

Persimmon Homes, Bluebell Meadow

Added by Designamite on 07/04/2015

Sent to Karen Castle.

Plot 005, 3 Bed Mid Terrace House, £179,950

The next step is to schedule an Appointment/Phone Call with the customer.

- 1 Referral Details (Date, Site, Plot, etc) - If the source is 'Website Direct Enquiry' a deposit will also feature.
- 2 Site Contact Details (Email and/or Tel if known).
- 3 Customers Personal Details including Investor Status and situation (FTB etc).
- 4 Customers Interests (Price range, sales schemes, timescale etc).
- 5 Select a Date and Time and click 'Schedule' to confirm (You cannot schedule an appt/call in the past).
- 6 Click the green '+Add' tab to add a Comment. This comment will be seen by the Sales Advisor at the appropriate development.

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Appointment/Phone Call Scheduled

Details

Referral Details

Date

Brand

Region

Development

07/04/2015

Persimmon Homes

Anglia

Bluebell Meadow

Plot(s)

Plot 005, 3 Bed Mid Terrace House, £179,950

Site Contact Details

Development Contact:

Karen Castle, bluebellmeadow.angl@persimmonhomes.com / 07587 039435

Personal Details

Mrs Kathrine Sarah Preece

 kathrine.preece@btinternet.com

Tel - Mobile

07855966842

Address

Flat 2
17 Unthank Road
Norwich
Norfolk
NR2 2PA
United Kingdom

Customer Situation

Non-Dependant - Other

Tel - Day/Work

01603 667081

Investor

No

Tel - Evening/Home

Missing

General Interests

Price Range

£ 90,000 - £90,000

Bedrooms Required

2 bed, 3 bed

Style of Property

Semi-Detached, Bungalow

Timescale For Purchase

Under 3m

Sales Schemes

Part Exchange, Help to Buy (2)

1

Complete Appointment

Use the box below to mark this appointment/phone call as completed or to reschedule or cancel it.

08/04/2015 at 10:00am

Reschedule

Cancel

Complete

Date (dd/mm/yyyy) *

08/04/2015

Hour *

10

Minute *

00

Reason for rescheduling

Comments

+ Add

2

Persimmon Homes, Anglia, Bluebell Meadow

Added by Karen Castle, Designamite Ltd. on 08/04/2015

Karen Castle scheduled an appointment for 08/04/2015 at 10:00.

Persimmon Homes, Anglia, Bluebell Meadow

Added by Karen Castle, Designamite Ltd. on 07/04/2015

Karen Castle confirmed receipt of email.

Persimmon Homes, Bluebell Meadow

Added by Designamite on 07/04/2015

Sent to Karen Castle.

Plot 005, 3 Bed Mid Terrace House, £179,950

When you have 'Scheduled' an Appointment/Phone Call you will see the above confirmation screen.

- 1 Here you can Reschedule, Cancel or mark an appointment as Complete.
- 2 Your Comments & actions are captured in the 'Comments' section.

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Reschedule an Appointment/Phone Call

General Interests

Price Range

£ 90,000 - £90,000

Bedrooms Required

2 bed, 3 bed

Style of Property

Semi-Detached, Bungalow

Timescale For Purchase

Under 3m

Sales Schemes

Part Exchange, Help to Buy (2)

Complete Appointment

Use the box below to mark this appointment/phone call as completed or to reschedule or cancel it.

08/04/2015 at 10:00am

Reschedule

Cancel

Complete

1

Date (dd/mm/yyyy) *

08/04/2015

Hour *

10

Minute *

00

2

Reason for rescheduling

* Indicates a required field

3

Reschedule

- 1 Select 'Reschedule' tab to change the Date or Time of the Appointment/Phone Call.
- 2 Add reason for Rescheduling.
- 3 Select 'Reschedule' to confirm/save.

Cancel an Appointment/Phone Call

General Interests

Price Range

£ 90,000 - £90,000

Bedrooms Required

2 bed, 3 bed

Style of Property

Semi-Detached, Bungalow

Timescale For Purchase

Under 3m

Sales Schemes

Part Exchange, Help to Buy (2)

Complete Appointment

Use the box below to mark this appointment/phone call as completed or to reschedule or cancel it.

08/04/2015 at 10:00am

1

Reschedule

Cancel

Complete

Reason for cancelling the appointment *

2

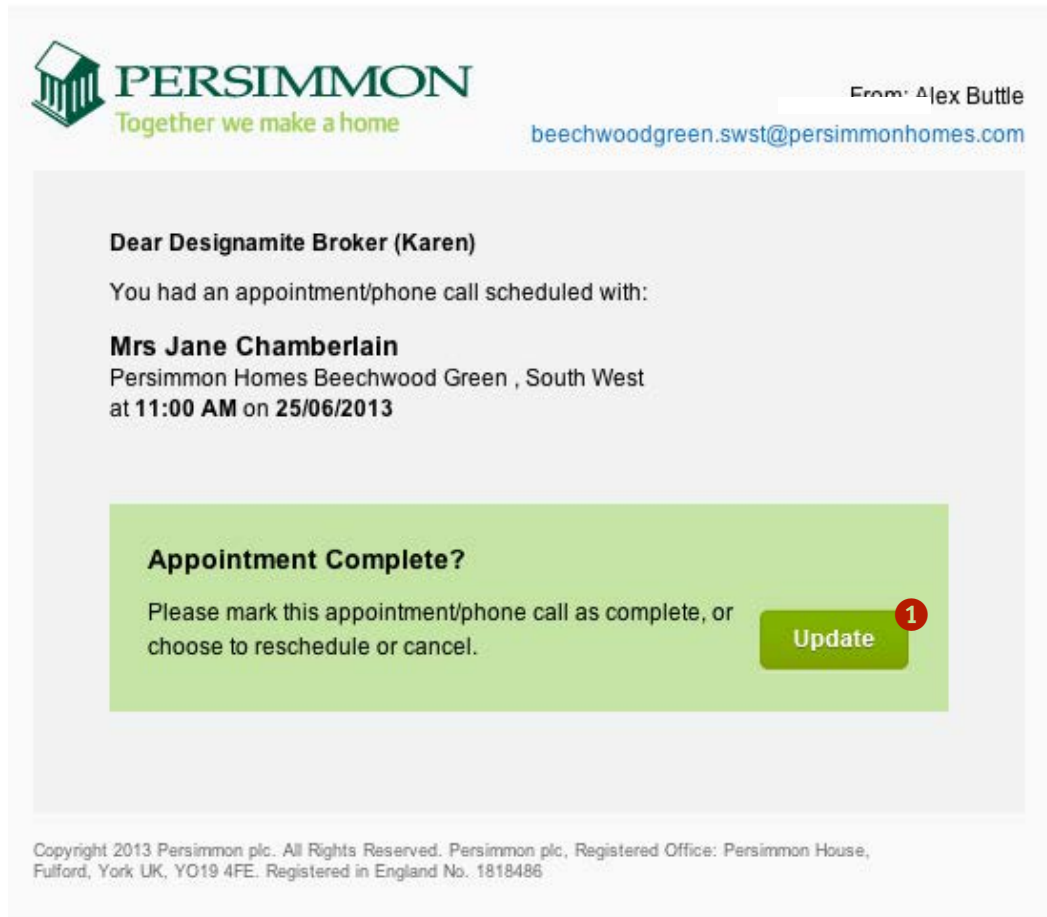
* Indicates a required field

3

Cancel

- 1 Select 'Cancel' tab to cancel the Appointment/Phone Call.
- 2 Add reason for Cancelling - comments are mandatory.
- 3 Select 'Cancel' to confirm/save.

Appointment/Phone Call - Confirmation Email



When the appointment time has passed, you should receive an automated email asking you to update the customers details.

- 1 Select 'Update' to mark the Appointment/Phone Call as complete or to Reschedule/Cancel.

Remove Appointment

Sales Admin System

https://crm.persimmonhomes.com/Brokers/appointment/8528/a139f68221414b0487a4046120ce92db

Reschedule Cancel Complete

Does the customer qualify for a mortgage? *

Select...

Additional comments

* Indicates a required field

Mark Complete

Remove Enquiry

Remove

2

You cannot remove an enquiry without adding a reason.

Reason

1

Remove

- 1 Click 'Remove' to confirm removal of Appointment
- 2 A reason must be given to complete the removal

Removing the appointment means it will no longer appear in the Enquiries tab or Overdue Tasks..

Complete Appointment

Sales Schemes

Part Exchange, Help to Buy (2)

Complete Appointment

Use the box below to mark this appointment/phone call as completed or to reschedule or cancel it.

08/04/2015 at 10:00am

Reschedule

Cancel

1
Complete

Does the customer qualify for a mortgage? *

2
Yes

Status *

3
Awaiting PX Figures

Sales Scheme *

4
Help to Buy (2)

Additional comments

5

* Indicates a required field

6
Mark Complete

- 1 Select 'Complete' tab to mark the appointment as Complete.
- 2 Mortgage Qualification - select Yes or No from drop down. You can update at any time.
- 3 Select customer status from the drop down.
- 4 If you select 'Yes' to mortgage, select the Sales Scheme. This information will populate the customers Reservation form.
- 5 Add 'Comments'. * **See Page 13**
- 6 Select 'Mark Complete' to confirm/save.

When you have marked an appointment/phone call as complete, you will see the above confirmation screen.

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Your Comments

The screenshot displays a web application interface for managing customer details. The main form is divided into several sections:

- Postcode:** KA1 2RE, with a 'Look Up' button.
- Address Line 1:** 56 York Place
- Town/City:** Kilmarnock
- Address Line 2:** Enter address line 2
- County:** Enter county
- Address Line 3:** Enter address line 3
- Country:** United Kingdom
- Customer Situation:** House to Sell
- Investor? :** No
- Broker Selection:** Persimmon (checked), Charles Church, Hillreed, Westbury
- Region, Site, Plot Reference Table:**

Region	Site	Plot Reference
West Scotland	The Ivy	
Designamite 1	Designasite	
Designamite 1	Designasite	
Designamite 1	Designasite	
Anglia	Becket's Grove	
Anglia	Becket's Grove	
Anglia	Becket's Grove	
Designamite 1	Designamite Persimmon	
- Marketing Preferences:** (Only check the boxes if the customer has asked NOT to be marketed to using that method)
 - ☐ Email
 - ☐ SMS
 - ☐ Telephone
 - ☐ Post
- Comments Section:**
 - Comments:**
 - Persimmon Homes, Designamite 1
 - Added by Design Amite Ltd, Designamite Ltd. on 07/01/2014
 - Design Amite Ltd marked the appointment/phone call as done.
 - Qualified: Yes.
 - Status: Doesn't Qualify for HTB.
 - Broker:**
 - Persimmon Homes, Anglia
 - Added by Design Amite Ltd, Designamite Ltd. on 07/01/2014
 - Design Amite Ltd confirmed receipt of email.
 - Comments:**
 - Persimmon Homes, Designamite 1
 - Added by Design Amite Ltd, Designamite Ltd. on 11/11/2013
 - Design Amite Ltd scheduled an appointment for 11/11/2013 at 13:15.
 - Comments:**
 - Persimmon Homes, Designamite 1
 - Added by Design Amite Ltd, Designamite Ltd. on 11/11/2013
 - Design Amite Ltd confirmed receipt of email.
 - Added by Designamite on 11/11/2013
 - Sent to Design Amite Ltd.
 - Plot ? (£?)
 - Added by Designamite on 11/11/2013

Your comments are captured in the 'Comments' section of the customer details for the Sales Advisor to see. This is an example of how it looks.

- 1 Broker Request - Confirmed Receipt.
- 2 Broker Request - Scheduled Appointment.
- 3 Broker Request - Appointment Completed.

Reservations

Reservation Agreement by Email



Reservation Agreement

Page 1 of 2

Mr Test test test
2 Blackthorn Avenue
Tiverton
EX16 6TY
United Kingdom

Sarah Scriven (Regional Administrator)
Persimmon Homes Anglia
Persimmon House
Colville Road Works
Oulton Broad, NR33 9QS

Tel: 01502 516784
sarah.scriven@persimmonhomes.com

Tuesday 25th February 2014

Dear Mr test

Thank you for reserving your new Persimmon home. Your reservation agreement is detailed below and your payment will now be processed.

1

Plot No. 276 - Becket's Grove

t - 01953 602 142, e - becketsgrove.angl@persimmonhomes.com

Property Address 8 Harvey Close Wymondham Norfolk NR18 0WH	Estimated Build Date Mar 15 - Apr 15	Release Price £243,950	Purchase Price £235,666
Tenure Freehold	House Type 4 Bed Detached House	House Type Name N/A	Gross Area (sq ft) TBC
Ground Rent N/A	Parking Spaces 0	Garage None	Garage Tenure N/A
Service Charge N/A	Garage Ground Rent N/A	Garage Service Charge N/A	

2

Sales Schemes

Part Exchange

Property Address
2 Blackthorn Avenue
Tiverton
EX16 6TY

Incentives

N/A

Promo Code
N/A

Agreed Price
TBC

Reservation Fee Paid: £250

Non-Refundable: £99
Reservation Date: 31/01/2014
Reservation Expiry: 17/03/2014
Payment Type: Card

When a customer Reserves you will receive an email of the Reservation form shown above. The customers' details will also appear in the Reservations tab (See Page 15).

1

Site, Plot Details and Customer Information.

2

If a Sales Scheme is selected (e.g. Help to Buy), it will be shown here. You can update this information on your Dashboard at any time.

Dashboard - Reservations

Persimmon Broker Admin System

Logged in as: Karen Castle | [Logout](#)

Tasks: You have **8** overdue actions.

Reservations

Shown below are your reservations. Use the search panel to filter and click on the **Edit** link next to them to view and update.

Search Panel:

- Enquiries** (1)
- Reservations** (2)
- First Name:** Enter first name
- Surname:** Enter surname
- Region:** All
- Development:** All
- Plot:** All
- Overdue Actions:** All
- Year:** All
- Week:** All
- Show All in Company:** No (3)
- Clear** **Search**

Your Results

Show: 10 1 - 2 of 2 results

Received	Lead Name	Brand	Region	Development	Plot (Price)	Qualified?	Next Action	Edit
10/02/14	Miss Karen Castle	P	Designamite 1	Designamite Persimmon	332a (£150,000)	Yes	Application	Edit
15/01/14	Mrs Karen Castle	P	Designamite 1	Designamite Persimmon	003 (£135,000)	Yes	Book survey	Edit

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- 1 The Reservations tab is where you manage your Reservations.
- 2 Filter by Name, Region, Development, Plot, Date or Action.
- 3 Show all in Company - by default, only Reservations linked to your login are shown. You can view all Reservations linked to your Company by selecting 'Yes' in the drop down.
- 4 Reservations are displayed in date order (most recent first). Overdue actions are shown in red, with the next action listed.
- 5 Select 'Edit' to view and/or update.

Reservations Details

Reservation - Mr Stephen Lynch

Below are the reservation details and pre-defined key dates for Mr Stephen Lynch. To mark an action as complete, please tick the box next to action. If you do not complete an action before the required date, it will be flagged in the system (see key at the bottom of page).

Please Note: You cannot add a date in the past. By default the system uses today's date, so it is essential that you update as soon as the action is completed.

Details

Reservation Details

Date	Brand	Region	Development	Plot
04/01/2013	Persimmon Homes	Anglia	Becket's Grove	052

Site Contact Details

Development Contact:
01953 602142

Personal Details

Mr Stephen Lynch	Tel - Mobile	Address
ss.lynychtalk21.com	07747774532	3 Poll Close
Investor	Tel - Day	Wymondham
No	Missing	Norfolk
	Tel - Evening	Norfolk
	Missing	NR18 0WU

Plot Details

Address	Estimated Build Date	Release Price	Purchase Price
3 Poll Close	20/05/2013	£154,950	£144,500
Wymondham			
Norfolk			
NR18 0WU			
	Parking Spaces	Build Stage at Reservation	Incentives
	1	CML	5% Deposit Paid
House Type	Tenure	Garage	Garage Tenure
2 Bed Mid Terrace House	Freehold	Single	Freehold
Promo Code			

Mortgage Details

When you 'View' a reservation you will see something similar to the screenshot above.

- 1 Click the green '+Add' tab to add a Comment to the customer's record. This comment will be seen by the Sales Advisor at the relevant development.
- 2 Customer Reservation Details & Site contact information.
- 3 Plot information including purchase price and incentives if applicable.

Reservations - Sales Schemes, Mortgage Details & Key Dates

The screenshot shows a web form for 'Sales Scheme' and 'Mortgage' details. It includes sections for 'Sales Scheme' (with checkboxes for 'Help to Buy (1)', 'Help to Buy (2)', 'NewBuy', 'Shared Equity', 'Part Exchange', and 'Home Change'), 'Mortgage' (with a 'Qualified?' dropdown set to 'Yes', tabs for 'Mortgage 1' and 'Mortgage 2', and input fields for 'Lender' (Abbey), 'Amount (£)' (100000), 'Loan to value (%)' (181.82), 'Mortgage Type' (Tracker), 'Term (Years)' (45), 'Valuation (£)' (55000), and 'Income Range (£)' (25000 - 35000)), 'Key Dates' (with dates for 'Reservation received', 'Appointment made', 'Application submitted', 'Valuation fee paid', 'Valuation (survey) booked', and 'Mortgage offered'), and 'Help to Buy' (with dates for 'Eligibility', 'Application', 'PIF signed', and 'Authority to proceed (ATP)'). A legend at the bottom indicates that orange boxes represent '1 - 7 days overdue' and red boxes represent '> 7 days overdue'. The form has 'Cancel / Back' and 'Update / Save' buttons at the bottom right.

Scroll down to view Mortgage Details and Key Dates. Once qualified please select the Sales Scheme and enter the Lender, Mortgage Amount, Mortgage Type, Term & Valuation.

- 1 Sales Scheme - this may be pre-populated by the Reservation form.
If Help to Buy is ticked, you have 4 additional Key Dates to Complete.
- 2 Mortgage Details - these may be pre-populated by the Reservation form. Update or enter if empty.
- 3 Key Dates - as predefined by Persimmon. You're required to enter the Key Dates for each completed stage.
These dates are linked to the Sales Advisors Dashboard and Plot Overview page as part of the overall Sales Progress procedure (See Page 21).
- 4 Tick the box against each step to mark as complete. Sales Advisors will be notified of updates.
- 5 Key - Orange means the task is 1-7 days overdue, Red 7+ days.
- 6 Select 'Update/Save' when you have actioned something to save.

Reservations - Failed Mortgage Application/Resubmission

Mortgage 1

Lender
Abbey

Amount (£)
100000

Loan to value (%)
82.50

Mortgage Type
Tracker

Term (Years)
45

Valuation (£)
55000

Income Range (£)
0 - 0

Key Dates

Reservation received
07/05/2014

Appointment made
09/05/2014

Application submitted
09/05/2014

Valuation fee paid
Yes

Valuation (survey) booked
09/05/2014

Mortgage offered
No **1**

Reason for failure
Valuation **2**

Application resubmitted
Selected **3**
07/06/2014

Help to Buy

Eligibility
09/05/2014

Application
11/05/2014

PIF signed
12/05/2014

Authority to proceed (ATP)
19/05/2014

Key
1 - 7 days overdue
> 7 days overdue

Cancel / Back **Update / Save**

If the first Mortgage application fails, you have the option to submit a second application.

- 1** Mortgage Offered - select 'No' from the drop down.
- 2** Reason for failure - select the reason from the drop down.
- 3** Application resubmitted - select 'Yes' or 'No' from the drop down.

Reservations - Removal

The screenshot shows a web browser window titled "Sales Admin System" with the URL "https://crm.persimmonhomes.com/Brokers/salesProgress/84333". The main form contains several input fields for reservation details:

- Select...** (dropdown)
- 0** (input field)
- 0.00** (input field)
- Mortgage Type** (dropdown)
- Term (Years)** (input field)
- Valuation (£)** (input field)
- Income Range (£)** (input field)
- (Joint) Earnings Multiplier** (input field)

Below these fields is a section titled "Key Dates" with the following entries:

- Reservation received**: 24/11/2016 (pink box)
- Appointment made**: 19/11/2016 (pink box)
- Application submitted**: 24/11/2016 (pink box)
- Valuation fee paid**: Select... (dropdown)
- Valuation (survey) booked**: 04/12/2016 (pink box)
- Mortgage offered**: Select... (dropdown)
- Mortgage expiry date**: 11/12/2016 (orange box)
- Re-survey required**: Select... (dropdown)

A warning dialog box is overlaid on the form, titled "Warning" with a red exclamation mark icon. The text inside the dialog reads: "Are you sure you would like to remove this reservation from your dashboard?". There are two buttons: "No" and "Yes".

At the bottom of the form, there is a "Key" section with a legend: "1 - 7 days overdue" (orange box) and "> 7 days overdue" (pink box). Below this, there are three buttons: "1 Remove" (red button with a red circle containing the number 1), "Cancel / Back" (grey button), and "Update / Save" (green button).

In the event a reservation is no longer proceeding with you, it can be removed from your list of actions.

- 1 Click 'Remove' to confirm removal of Reservation

Removing the reservation means it will no longer appear in the Reservation tab or Overdue Tasks.

Reservations - Mortgage Application Resubmission

The screenshot displays a web application interface for mortgage applications. A modal window titled "Mortgage Application - Resubmission" is open, prompting the user to enter new mortgage details. The background shows a "Mortgage" section with a "Qualified?" dropdown set to "Yes". Below this, "Mortgage 1" details are visible: Lender (Abbey), Amount (£) (100000), Loan to value (%) (82.50), Mortgage Type (Fixed), Term (Years) (25), and Valuation (£) (200000). The modal form contains the following fields:

- Lender:** Nationwide Building Society (dropdown)
- Amount (£):** 150000
- Loan to value (%):** 83.75
- Mortgage Type:** Fixed (dropdown)
- Term (Years):** 25
- Fixed Term (Years):** 5
- Valuation (£):** 200000
- Income Range (£):** 25000 - 300000

The modal includes "Save" and "Cancel" buttons at the bottom right.

If you chose to resubmit a second Mortgage application, you will be prompted to enter the new mortgage application details. Click Save when complete.

Reservations - Resubmission (Mortgage 2)

Mortgage 1 **Mortgage 2** 1

Lender
Nationwide Building Society

Amount (£)
150000

Loan to value (%)
93.75

Mortgage Type
Fixed

Term (Years)
25

Fixed Term (Years)
5

Valuation (£)
200000

Income Range (£)
25000 - 35000

Key Dates

Reservation received
07/05/2014

Appointment made
09/05/2014

Application submitted
09/05/2014

Valuation fee paid
Yes

Valuation (survey) booked
09/05/2014

Mortgage offered
No

Reason for failure
Valuation

Application resubmitted
Yes 2
22/05/2014

Second mortgage offered
Selected 3
24/06/2014

Help to Buy

Eligibility
09/05/2014

Application
11/05/2014

PIF signed
12/05/2014

Authority to proceed (ATP)
19/05/2014

Key 1 - 7 days overdue > 7 days overdue

[Cancel / Back](#) [Update / Save](#)

If you have chosen to submit a second mortgage application, a few more Key dates appear.

- 1 Mortgage 2 tab - this tab contains details of the second mortgage application.
- 2 The date is populated by the date the 'Application resubmitted' field was entered.
- 3 Second mortgage offered - select 'Yes' or 'No' from the drop down when received.

Prospects - Search

Dashboard | **Prospects** | Open Times | Account

Your search returned 1 result. Scroll down or [click here](#) to view.

Find or Add a Prospect

Before you can add a new prospect you need to see if they are already in the system.

1 Advanced Search

First Name: Karen Surname: Jenkins

Email: kj@hotmail.com Tel - Mobile: Enter mobile number

Tel - Other/Day: Enter telephone number Address Line 1: Enter address line 1 Postcode: Enter postcode

Clear Search **2**

Search Results

Your search returned 1 results.

Show: 10 1 - 1 of 1 results

Name	Address	Postcode	Mobile	Email	
Mrs Karen Jenkins	Innovative Gas Products Ltd, 4 Oak Business Units	EX2 8FS		kj@hotmail.com	View 3

Results with a yellow background have matched one or more Additional Prospect.

4 New Prospect Enquiry

For referrals received by telephone you can add a prospect to the system to start processing the enquiry, without needing to wait for a referral email.

- 1** Before adding a new Prospect ensure they do not already exist in the system, to avoid creating duplicates.
- 2** Fill-in as many details as you can and click the 'Search' button to return results.
- 3** Click the 'View' link to edit existing Prospect's details.
- 4** If the details return no results, the prospect does not exist in the system and a new enquiry can be added.

Prospects - Add/Edit

New Enquiry

Details

Cancel

Personal Details

Lead

1 **Company**
No

2 **Title**
Select... Please select button next to preferred telephone contact method.

First Name
Enter first name

Middle Name
Enter middle name

Surname
Enter surname

Email
Enter email address

Tel - Mobile
Enter mobile number

Tel - Day/Work
Enter day telephone number

Tel - Evening/Home
Enter evening telephone number

Postcode
Enter postcode **Look Up** 3

Address Line 1
Enter address line 1

Address Line 2
Enter address line 2

Address Line 3
Enter address line 3

Town/City
Enter town/city

County
Enter county

Country
United Kingdom

Once in a Prospect record you can add/edit various details.

- 1 Specify whether the enquiry is from a person or on behalf of a company.
- 2 Add/edit name and contact details.
- 3 Use the postcode lookup tool to add/edit address details.

Prospects - Add/Edit (continued)

4 Region: Select... Site: Select... Plot Reference: Select...

5 Price Range: Min Price: No Min Max Price: No Max

Bedrooms Required: ☐ 1 bed ☐ 2 bed ☐ 3 bed ☐ 4 bed ☐ 5 bed+

Style of Property: ☐ Apartment/Coach House ☐ Terraced ☐ Semi-Detached ☐ Town House ☐ Detached ☐ Bungalow

Timescale For Purchase: ☐ ASAP ☐ Under 3m ☐ 3-6m ☐ 6-12m ☐ Over 12m ☐ Unknown

Sales Schemes of Interest: ☐ Government Scheme - Other ☐ Help to Buy (1) ☐ Help to Buy (2) ☐ Help to Buy (Scotland) ☐ Help to Buy (Wales) ☐ Help to Buy ISA ☐ Help to Buy London ☐ Helping Hand

Other: Select... or add:

4 Specify region / development / plot(s) of interest.

5 Add/edit purchasing preferences.

Prospects - Add/Edit (continued)

The screenshot shows a web browser window titled 'Sales Admin System' with the URL 'https://crm.persimmonhomes.com/Prospects/brokerEdit'. The form is divided into several sections:

- Bedrooms Required:** Radio buttons for 1 bed, 2 bed, 3 bed, 4 bed, and 5 bed+.
- Style of Property:** Radio buttons for Apartment/Coach House, Terraced, Semi-Detached, Town House, Detached, and Bungalow.
- Timescale For Purchase:** Radio buttons for ASAP, Under 3m, 3-6m, 6-12m, Over 12m, and Unknown.
- Sales Schemes of Interest:** A list of checkboxes for various schemes: Government Scheme - Other, Help to Buy (1), Help to Buy (2), Help to Buy (Scotland), Help to Buy (Wales), Help to Buy ISA, Help to Buy London, Helping Hand, Home Change, and Part Exchange. To the right of this list is an 'Other' section with a 'Select...' dropdown menu and a text input field labeled 'or add'.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save Enquiry'. A red circle with the number 6 is positioned next to the 'Save Enquiry' button.

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6 Confirm information with Prospect and save enquiry.

This will then add an alert to the relevant 'Site' dashboard, notifying the Sales Advisor that an incomplete prospect has been added to the system. They can then review the entry and add the outstanding information.

Dashboard - Open Times

The screenshot shows a web browser window with the URL <https://crm.persimmonhomes.com/Brokers/openTimes>. The page is titled 'Update opening times' and is part of the 'Broker Admin System'. The user is logged in as 'Karen Castle'. The page has four tabs: 'Dashboard', 'Prospects', 'Open Times', and 'Account'. The 'Open Times' tab is active. The form contains a table for setting opening hours for each day of the week. Each row has two time input fields and a 'Closed' checkbox. The current settings are: Monday (09:00 to 18:00, not closed), Tuesday (09:00 to 18:00, not closed), Wednesday (09:00 to 18:00, not closed), Thursday (09:00 to 18:00, not closed), Friday (09:00 to 17:00, not closed), Saturday (empty, checked closed), and Sunday (empty, checked closed). There are 'Back' and 'Save' buttons at the bottom of the form. At the bottom of the page, there is a copyright notice: 'Copyright 2013 Designamite Ltd. Registered Office: 7 Oak Business Units, 18 Thorverton Road, Matford, Exeter, EX2 8FS. Registered in England No. 4777921 | [Website](#) | [Email](#)'.

Day	Start Time	End Time	Closed
Monday	09:00	18:00	☐
Tuesday	09:00	18:00	☐
Wednesday	09:00	18:00	☐
Thursday	09:00	18:00	☐
Friday	09:00	17:00	☐
Saturday			☒
Sunday			☒

- 1 The Open Times tab is where you manage your firm's business hours.
- 2 Specify opening times by using the drop-down menus provided.
- 3 Specify opening days by using the 'Closed' tick boxes.
- 4 Confirm opening times by clicking 'Save'.

Sales Advisor - Dashboard (for reference only)

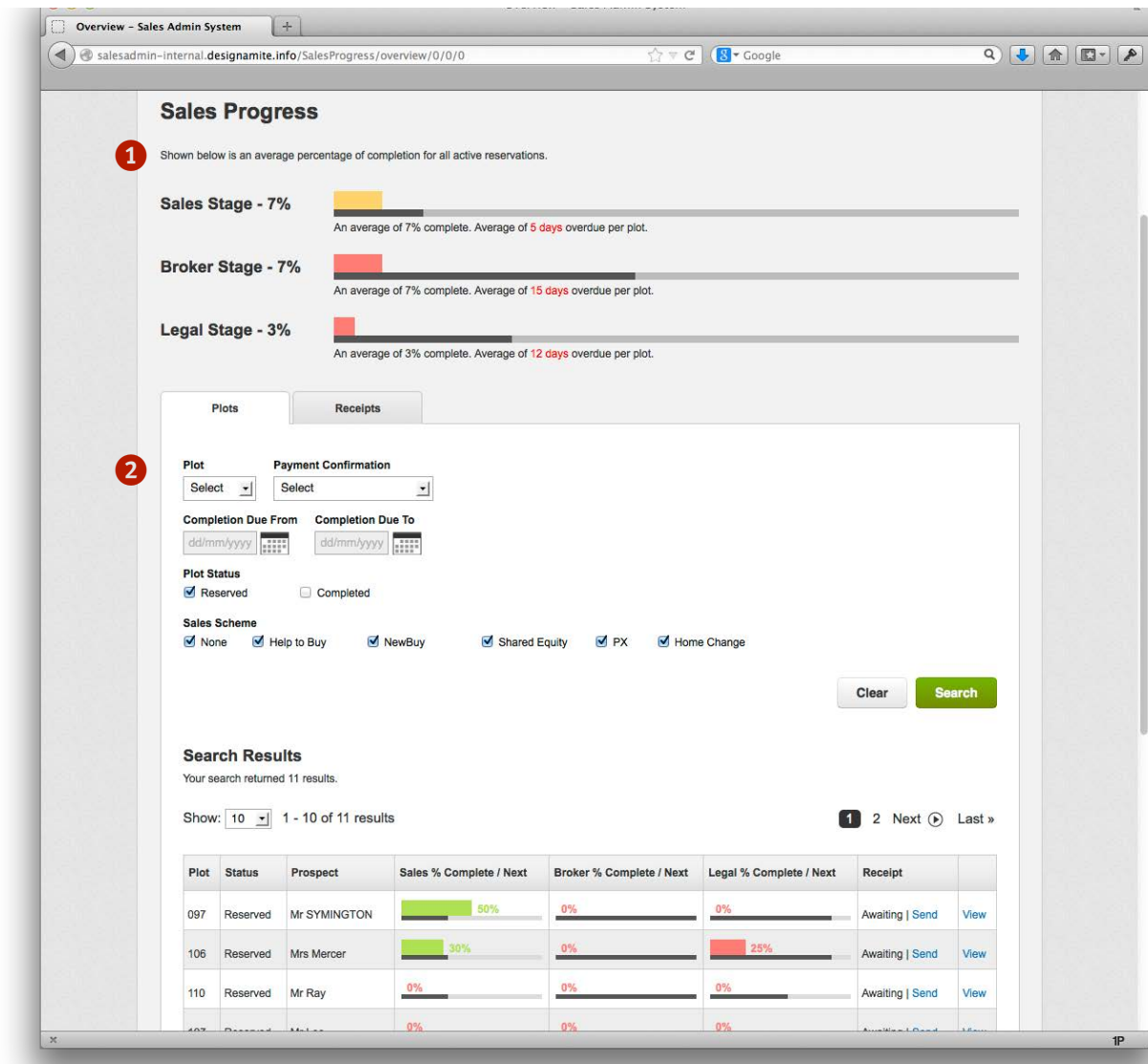
The dashboard includes a top navigation bar with tabs for Dashboard, Calendar, Prospects, and Sales Progress. A green 'Visitor Count' badge in the top right shows 'Today's total visitor count: 0 (week total: 0)'. A task notification bar at the top left states: '1 Tasks: You have 1 key date updated, 1 comment added.' Below this, an orange banner indicates 'There are 2 postal reservation forms more than 2 days old waiting to be posted.' with a 'View' button. The main content area has tabs for Appointments, Follow Ups, Review, Recent Enquiries, Unfinished KITs, and Advanced Search. A search filter section includes fields for Quick Date, From, To, Plot, and Action, with 'Clear' and 'Search' buttons. The 'Search Results' section shows 'Your search returned 40 results.' and a pagination bar with 'Show: 10' and '1 - 10 of 40 results'. A table displays the search results with columns: Date, Prospect Name, Added By, Plot, Action, Status, and Mark as read: selected or all. The table contains two rows of data, with the second row highlighted by a red circle '2'.

Date	Prospect Name	Added By	Plot	Action	Status	Mark as read: selected or all
08/04/2015 09:37	Karen Castle	Karen Castle - Broker		Comments	P	View 1
08/04/2015 09:27	Karen Castle	Karen Castle - Broker	004	Key Dates	P	View 2

Sales Advisors are notified of any updates to a reservation made by a Broker.

- 1 The Task bar identifies which part of the Reservation has been updated (Key Date or Comment added, Enquiry, Appointment or Reservation removal).
- 2 The Sales Advisor clicks 'View' to see update(s).

Sales Advisor - Sales Progress Dashboard (for reference only)



Sales Advisors have a traffic light system to instantly see the status of each reservation.

- 1 Performance Overview - Linked to your Key Dates - the dark grey bar is where the Broker status should be (please note this is an average across all reservations for that site, not necessarily yours).
- 2 Plot specific - Sales Advisors can quickly identify issues. The dark grey bar is where you should be on any given plot, and the coloured % above is where you are. Green on target, Orange 1-7 days overdue, Red 7+ days overdue.