



# Closing a Site

## Training Manual

Version 1.0

Thursday, 12 February 2015

# Overview

To close a site in SSAS, you must ensure that all Reservations linked to that site have been marked as either Completed or Cancelled. You cannot close a site that contains 'live' Reservations.

Why?

Because it is vitally important that Reservations, Cancellations and Completions are accurately recorded in SSAS. Incorrect and out-of-date information not only affects Management and Group reports, but the ability for COINS and SSAS to 'feed' data between each other. In addition to this are the prospects themselves, whose customer journey, purchasing history, post-purchase marketing, and customer care, is seriously affected.

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## Closing a Site - Select the Site

The screenshot shows the 'Edit Site' page for 'Westfield' in the Persimmon Sales Admin System. The page has a top navigation bar with tabs for Dashboard, Calendar, Prospects, Reports, Sales Progress, and Admin. The 'Admin' tab is selected, and a dropdown menu is open showing options like Account, Super Administrators, Data Entry, Group Administrators, Regional Administrators, Managers, Brokers, Estate Agents, Solicitors, Lenders, Sites (highlighted with a red circle and number 1), Plots, Site Logins, Sales Advisors, Marketing, and Exports. The main form area is titled 'Edit Westfield' and contains a 'Details' section with the following fields: Site Name (Westfield), Brand (Persimmon), Region (Yorkshire), Site Login (Westfield), COINS Code (611), Freehold/Leasehold (Select), and Status (Open, highlighted with a red circle and number 2). At the bottom of the form are three buttons: Back, Clear, and Save (highlighted with a red circle and number 3).

- 1 Select 'Sites' from the Admin menu drop-down.
- 2 Change the 'Status' to Closed.
- 3 Select 'Save'

## Reservations linked to 'Closed' Sites

The screenshot shows the 'Edit Site - Sales Admin System' interface. The browser address bar displays 'https://crm.persimmonhomes.com/Admin/editSite/6484'. The user is logged in as 'Karen Castle'. The main navigation bar includes 'Dashboard', 'Calendar', 'Prospects', 'Reports', 'Sales Progress', and 'Admin'. The 'Edit Westfield' form is visible, with fields for 'Site Name' (Westfield), 'Brand' (Persimmon), 'Region' (Yorkshire), 'Site Login' (Westfield), 'COINS Code' (611), 'Freehold/Leasehold' (Select), and 'Status' (Closed). A red box highlights the 'Status' dropdown. A confirmation dialog box is overlaid on the form, titled 'Confirm', with the message: 'You cannot close this site as there are 19 reservations still in progress. Would you like to view them?'. The dialog has 'No' and 'Yes' buttons. A red circle with the number '1' points to the 'Status' dropdown, and a red circle with the number '2' points to the 'Yes' button.

- 1 An alert will appear if the site cannot be closed because it contains 'live' reservations.
- 2 Select 'Yes' to view the live reservations.

# View Prospect Reservations

Overview - Sales Admin System

https://crm.persimmonhomes.com/SalesProgress/overview/0/0/0

we are the facilita... Start Stumbling...

**PERSIMMON** Sales Admin System

Logged in as: Karen Castle | Logout

Dashboard Calendar Prospects Reports Sales Progress Admin

1 Your search returned 19 results. Scroll down or [click here](#) to view. There are 19 reservations in total.

There are 23 reservation forms waiting to be sent. The oldest is 266 days old. [View](#)

### Sales Progress

Shown below is an average percentage of completion for all active reservations at Westfield.

**Sales Stage - 68%**  
An average of 68% complete. Average of 85 days overdue per plot.

**Broker Stage - 49%**  
An average of 49% complete. Average of 111 days overdue per plot.

**Legal Stage - 9%**  
An average of 9% complete. Average of 127 days overdue per plot.

Plots Sites Overview Reservation Forms Pending Cancellations Activity

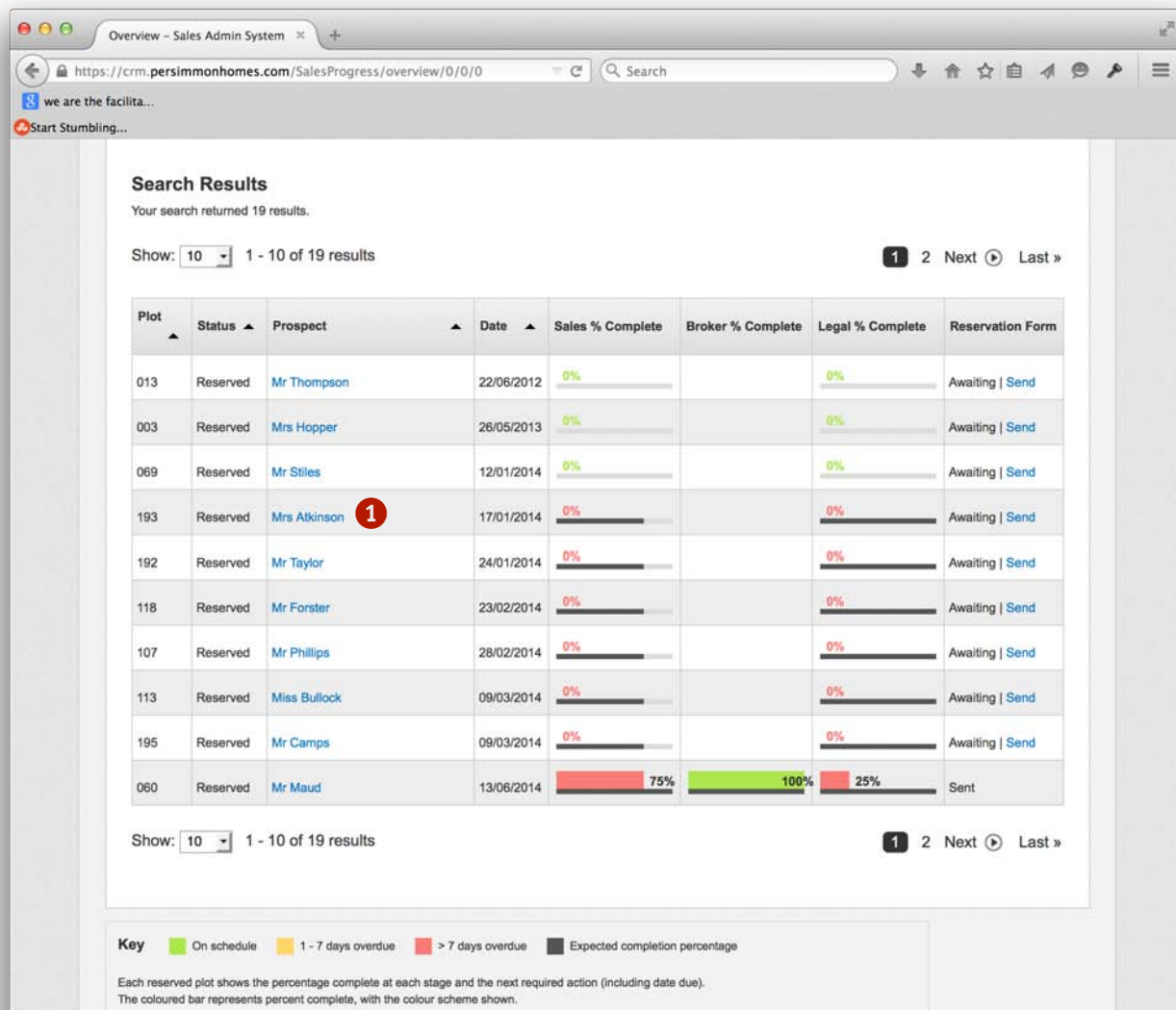
Brand: All Region: Select Plot: Select Payment Confirmation: Select

Plot Status  
☒ Reserved ☒ Exchanged ☐ Completed

Sales Scheme  
☒ None ☒ Help to Buy (1) ☒ Help to Buy (2) ☒ Home Change ☒ MI ☒ NewBuy ☒ PX ☒ Shared Equity

- 1 The number of live reservations is displayed at the top of the page. Scroll down to view (see Page 7).

## Update Prospects



**Search Results**  
Your search returned 19 results.

Show: 10 1 - 10 of 19 results 1 2 Next Last »

| Plot | Status   | Prospect                              | Date       | Sales % Complete | Broker % Complete | Legal % Complete | Reservation Form                |
|------|----------|---------------------------------------|------------|------------------|-------------------|------------------|---------------------------------|
| 013  | Reserved | <a href="#">Mr Thompson</a>           | 22/06/2012 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 003  | Reserved | <a href="#">Mrs Hopper</a>            | 26/05/2013 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 069  | Reserved | <a href="#">Mr Stiles</a>             | 12/01/2014 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 193  | Reserved | <a href="#">Mrs Atkinson</a> <b>1</b> | 17/01/2014 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 192  | Reserved | <a href="#">Mr Taylor</a>             | 24/01/2014 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 118  | Reserved | <a href="#">Mr Forster</a>            | 23/02/2014 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 107  | Reserved | <a href="#">Mr Phillips</a>           | 28/02/2014 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 113  | Reserved | <a href="#">Miss Bullock</a>          | 09/03/2014 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 195  | Reserved | <a href="#">Mr Camps</a>              | 09/03/2014 | 0%               |                   | 0%               | Awaiting   <a href="#">Send</a> |
| 060  | Reserved | <a href="#">Mr Maud</a>               | 13/06/2014 | 75%              | 100%              | 25%              | Sent                            |

Show: 10 1 - 10 of 19 results 1 2 Next Last »

**Key** ■ On schedule ■ 1 - 7 days overdue ■ > 7 days overdue ■ Expected completion percentage

Each reserved plot shows the percentage complete at each stage and the next required action (including date due).  
The coloured bar represents percent complete, with the colour scheme shown.

- 1 Click the prospects name (in blue) to view the reservation.

## Update Prospects (Cancel)

**Buyer's Solicitor**

Using a Persimmon recommended solicitor?

**Internal Solicitor**

Company  Contact

**Mortgage**

Required?

**Fees**

Reservation Expiry Date  Reservation Fee  or £ 0 Non-Refundable Part  or £ 0 Payment Type

**Cancel Reservation**

To cancel a reservation please enter a date and reason below and click cancel. If you cancel a reservation by mistake you cannot undo.

Date (dd/mm/yyyy)  Reason

To Cancel, select the 'Reservation Details' tab and scroll to the bottom.

- 1 By default today's date is shown. Please enter an accurate Cancellation date - you cannot enter a date that precedes the Reservation date.
- 2 Enter a Reason for the cancellation if known. This will appear in the Comments box on the Main Details page.
- 3 Select 'Cancel Reservation'.

## Update Prospects (Completed)

**Key Dates**

Below are the pre-defined key dates for this reservation. 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).

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.

| Sales                         | Legal                                         |
|-------------------------------|-----------------------------------------------|
| Reserved<br>17/01/2014        | Solicitor instructed (formally)<br>23/01/2014 |
| Pre-reservation<br>24/01/2014 | Contract papers issued<br>26/01/2014          |

**Key** 1 - 7 days overdue > 7 days overdue

[View as timeline](#)

[View all dates](#)

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

**Completion**

To mark this as a completed purchase please fill out the details below.  
Please note: once a reservation is marked as purchased it cannot be cancelled.

Legal completion (dd/mm/yyyy) dd/mm/yyyy **1**

Key release (dd/mm/yyyy) dd/mm/yyyy **2**

[Completed](#) **3**

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To mark the Reservation as Complete , select the 'Progression Details' tab and scroll to the bottom.

- 1** Please enter an accurate Completion date.
- 2** Enter the Key release date (if known).
- 3** Select 'Completed'.

**Please Note:**

**A Site can only be closed once ALL reservations have been marked as either completed or cancelled**