

Admin - Adding a Comment on behalf of a 'Site'

The screenshot shows the 'Edit prospect' page in the Persimmon Sales Admin System. A modal window titled 'Add Comment' is open, overlaying the 'Main Details' tab. The modal contains the following fields and controls:

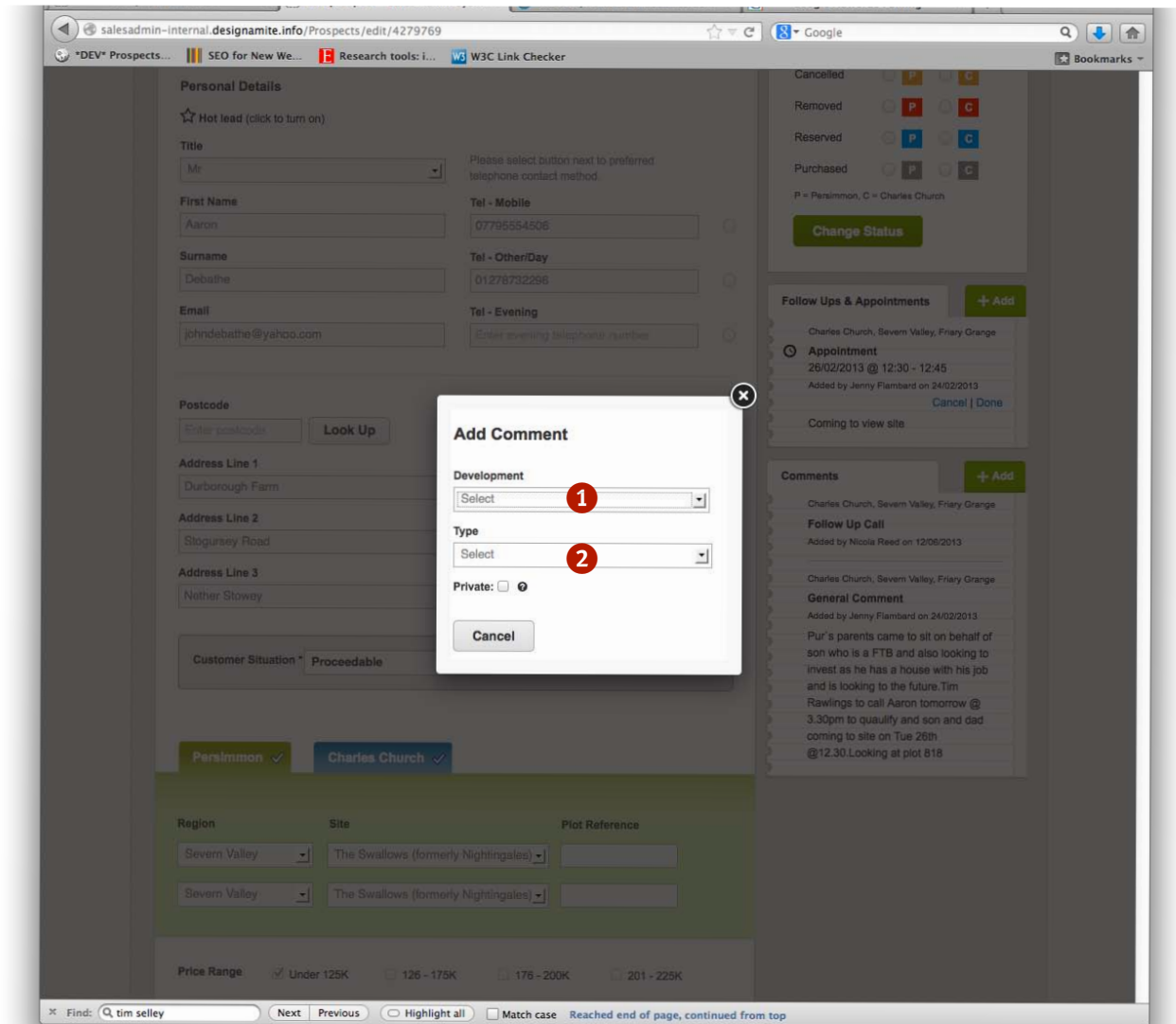
- Development:** A dropdown menu pre-populated with 'Pethererton Dean' (marked with a red circle 1).
- Type:** A dropdown menu with 'Follow Up Call' selected (marked with a red circle 2).
- Private:** A checkbox that is currently unchecked.
- Enter comment:** A text area for adding the comment (marked with a red circle 3).
- Buttons:** 'Cancel' and 'Save' buttons at the bottom of the modal (the 'Save' button is marked with a red circle 4).

The background page shows the prospect's details, including personal information, address, and a 'Prospect Status' section with options like Live, Cancelled, Removed, Reserved, and Purchased.

If you're dealing with an enquiry on behalf of a Development (e.g. the Development may be closed or coming soon), you must add a Comment.

- 1 If a prospect has enquired at one Development in your region, the Development field will be pre-populated
- 2 Select 'Type' of follow up from the drop down list
- 3 Add Comment
- 4 Select 'Save' to save details

Admin - Adding a Comment on behalf of a development



- 1 If a prospect has enquired at multiple Developments, you must select the relevant Development from the drop down
- 2 Select 'Type' of follow up from the drop down list

Admin - Comment Saved

The screenshot shows the 'Edit prospect - Sales Admin System' interface. The browser address bar indicates the URL is `salesadmin-internal.designamite.info/Prospects/edit/4275759`. The user is logged in as Danielle Nicholls, Region: Severn Valley.

The main navigation tabs are Dashboard, Calendar, Prospects, and Admin. The 'Prospect' section is active, showing tabs for Main Details, History, and Prospect Comments (0).

Personal Details:

- Title:** Mr/Mrs (dropdown)
- First Name:** Enter first name
- Surname:** Abrahams
- Email:** Enter email address
- Postcode:** BS7 9NS
- Address Line 1:** 19 Crowther Road
- Address Line 2:** Enter address line 2
- Address Line 3:** Enter address line 3
- Town/City:** Bristol
- County:** Avon
- Country:** United Kingdom

Telephone Numbers:

- Tel - Mobile:** 07593278922
- Tel - Other/Day:** Enter day telephone number
- Tel - Evening:** Enter evening telephone number

Buttons: Cancel, Update Prospect, Add New Enquiry

Prospect Status:

- Live: ☒ P ☐ C
- Cancelled: ☐ P ☐ C
- Removed: ☐ P ☐ C
- Reserved: ☐ P ☐ C
- Purchased: ☐ P ☐ C

Follow Ups & Appointments: + Add

Comments: + Add

Comments List:

- Persimmon Homes, Severn Valley, Petherton Dean
- Brochure Sent** (highlighted with a red circle and number 1)
- Added by Danielle Nicholls on 12/06/2013
- Price list included

Customer Situation: House to Sell **Investor?:** No

1 Your Comment is saved

Admin - Adding a Comment to a 'Region Wide' Enquiry

Select the options below to filter your results

Quick Date: Or From To Enquiry Type: Reason:

Region: Development:

Your Results

Show: 1 - 10 of 382 results

1 2 3 4 5 ... 39 Next Last »

Date	Added By	Prospect Name	Brand	Region	Development	Reason	Customer Situation	
01/06/13	Designamite	James Potheary	PH	SV	1	Enquiry from Website		2 View
03/06/13	Designamite	Adam Clarke	CC	SV		Enquiry from Website	Non-Dependant	View
14/06/13	Designamite	Adam Clarke	CC	SV		Enquiry from Website		View
01/06/13	Designamite	James Potheary	PH	SV		Enquiry from Website		View
11/06/13	Designamite	Garry Anderson	PH	SV		Enquiry from Website	Non-Dependant	View
13/06/13	Designamite	Richard Stidard	CC	SV		Enquiry from Website	Non-Dependant	View
01/06/13	Designamite	Matt Boiles	PH	SV		Enquiry from Website	House to Sell	View
14/06/13	Designamite	Abigail Sweeney	PH	SV		Enquiry from Website		View
06/06/13	Designamite	Bev Williams	PH	SV		Enquiry from Website	Proceedable	View
19/06/13	Designamite	Stephen Dare	PH	SV		Enquiry from Website		View

Show: 1 - 10 of 382 results

1 2 3 4 5 ... 39 Next Last »

1 'Regionwide' enquiries have no Development name in the Development column.

2 Select 'View' to open the KIT form to edit/view details.

Admin - Adding a Comment to a 'Region Wide' Enquiry

The screenshot shows the 'Prospect' page in the Persimmon Sales Admin System. A modal window titled 'Add Comment' is open, allowing a user to add a comment to a prospect. The modal has a 'Type' dropdown menu (labeled 1) with 'General Comment' selected. Below this is a 'Private' checkbox and a text area for the comment. At the bottom of the modal are 'Cancel' and 'Save' buttons (labeled 2). The background shows the 'Prospect' details form with fields for Personal Details, Address, and Contact Information. On the right, there is a 'Prospect Status' section with radio buttons for Prospect, Cancelled, Removed, Reserved, and Purchased, each with 'P' (Persimmon) and 'C' (Charles Church) options. Below this is a 'Follow Ups & Appointments' section with a 'Call Back - Completed' entry. At the bottom right is a 'Comments' section with a 'General Comment' entry.

- 1 Select 'Type' of follow up from the drop down list, and add a comment
- 2 Select 'Save' to save details - this will turn a 'red' enquiry to black

Admin - 'Region Wide' Enquiry - Finding a 'Site' of interest

The screenshot shows the Persimmon Sales Admin System interface. At the top, the Persimmon logo and tagline 'Together, we make a home' are on the left, and the text 'Sales Admin System' is in the center. On the right, it says 'Logged in as: Karen Castle | Logout'. Below this is a navigation bar with tabs: Dashboard, Calendar, Prospects, Reports, and Admin. The 'Prospect Comments' section is active, showing sub-tabs: Main Details, History, and Prospect Comments (1). The 'Prospect Comments (1)' tab is selected, displaying a table with one result. The table has columns: Date, Source, Brand, Region, and Comment. The single row shows a date of 26/04/13, source of Enquiry from Website, brand of PH, and region of SV. The comment text is: 'looking to buy property have seen prices from 30k. Please can you send details of properties at those prices I have 25k deposit available and I'm a first time buyer in full time employment Thankyou'. A red circle with the number 1 is placed over the comment text. A 'Cancel' button is visible in the top right corner of the comment view area. Below the table, there is a footer with copyright information: 'Copyright 2013 Designamite Ltd. Registered Office: 7 Oak Business Units, 18 Thorverton Road, Matford, Exeter, EX2 8FS. Registered in England No. 4777921 | Website | Email'.

PERSIMMON Sales Admin System

Together, we make a home

Logged in as: Karen Castle | Logout

Dashboard Calendar Prospects Reports Admin

Prospect Comments

Main Details History Prospect Comments (1)

Cancel

Show: 10 1 - 1 of 1 results

Date	Source	Brand	Region	Comment
26/04/13	Enquiry from Website	PH	SV	1 looking to buy property have seen prices from 30k. Please can you send details of properties at those prices I have 25k deposit available and I'm a first time buyer in full time employment Thankyou

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A 'Region Wide' enquiry should be added to a Site in order for that Site to manage the lead.

- 1 Select 'Prospect Comments' to find out the site/area of interest

Admin - Adding a Site to a 'Region Wide' Enquiry

GL15HB Look up

Address Line 1
51 Linden Road

Address Line 2
Enter address line 2

Address Line 3
Enter address line 3

Town/City
Gloucester

County
Gloucestershire

Country
United Kingdom

Customer Situation * Non-Dependant Investor? * No

Subcategory * Select

Persimmon ✓ Charles Church

Specific Enquiry Other Interests

Region Severn Valley Site * Select Plot Reference Enter plot +

Source of Enquiry * Brochure Detailed Source of Enquiry (Media/Website etc.) Select

Reason for KIT * Emailed or Telephoned KIT Date (dd/mm/yyyy) 24/06/2013

Price Range ☐ Under 125K ☐ 126 - 175K ☐ 176 - 200K ☐ 201 - 225K
☐ 226 - 250K ☐ 251 - 300K ☐ Above 301K ☐ All

Minimum Bedrooms ☒ 1 bed ☐ 2 bed ☐ 3 bed
☐ 4 bed ☐ 5 bed+

Style of Property ☒ Apartment/Coach House ☐ Terraced

Persimmon Homes, Severn Valley, the Iryn
General Comment
Added by Maggie Allinson on 28/04/2013
called customer he is currently in prison for fraud wants too talk to an ifa about getting a mortgage at a later date referred to tim

- 1 Update the Prospect by adding a 'New Enquiry' and Select 'Email or Telephoned'
- 2 Select the Site from the drop down list and enter a Plot number of interest if known

Please Note: See pages 18-19 for full details on how to Save a KIT.