

Select a Broker - Alert

The screenshot shows a web application interface for Persimmon Homes. A modal dialog box titled "Confirm" is displayed in the center. The dialog contains the text: "Please explain the benefits of using one of our nominated brokers. Would the customer like to be contacted by one of our nominated brokers to arrange an appointment?". Below the text are two buttons: "No" (labeled with a red circle and the number 2) and "Yes" (labeled with a red circle and the number 1). The background form is partially visible and includes sections for filtering prospects by price range, minimum bedrooms, style of property, timescale for purchase, sales schemes of interest, and non-contact preferences. At the bottom of the form, there are buttons for "Cancel", "Save as draft", and "Update / Save".

When a prospect 'Visits or Revisits' you will be asked to explain the benefits of using a Broker.

- 1 Select 'Yes' if the prospect would like to use a broker.
- 2 Select 'No' if the prospect does not want to use a broker.

Select a Broker - Add Comment

The screenshot displays the 'Select Broker' modal form overlaid on the main 'Add Comment' page. The modal has a title bar with a close button (X). Inside, it prompts the user to 'Please select a broker.' with a dropdown menu (1) currently showing 'Broker 1'. Below this is a text area (2) containing the comment: 'Mr Smith has a £5000 deposit, please call Monday at 10am.' A green 'Submit' button (3) is at the bottom right of the modal. The background page shows various filters for property selection, including price ranges, minimum bedrooms, style of property, timescale for purchase, sales schemes of interest, and non-contact preferences.

If you select 'Yes', you must select a Broker from the drop down list.

- 1 Select a Broker.
- 2 Add Comment - this comment is included in the email sent to the broker.
- 3 Press Submit.

Select a Broker - Brokers Email

**PERSIMMON**
Together we make a home

From: Karen Castle
karen@designamite.co.uk

Dear Broker 1

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	Mr Ricardo Hugk
Email address	rhugk@hotmail.com
Mobile telephone number	07576243955
Address line 1	
Country	United Kingdom
Investor	No

Specific Interests

Brand	Persimmon Homes
Region	Designamite 1
Development	Designamite 1 Prospect

General Interests

Other Information

Customer situation	Non-Dependant
Comments	Mr Smith has £5000 deposit. Please call Monday at 10am.

Confirmation
You must acknowledge receipt of this email **1**

Schedule or Amend
To schedule/amend an appointment or phone call **2**

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The Broker will receive an email, similar to above, containing the prospects details.

- 1** The Broker must select 'Confirm' to acknowledge receipt of the email.
- 2** The Broker must select 'Schedule' to schedule or amend an appointment or phone call.

Select a Broker - Broker Comments

The screenshot displays the 'Select a Broker - Broker Comments' interface. The main form area includes fields for Email, Tel - Evening, Postcode, Address Line 1-3, Town/City, County, and Country. Below these are dropdowns for Customer Situation (Non-Dependant) and Investor? (No). A green bar highlights the 'Persimmon' and 'Charles Church' broker selection. Below this, there are dropdowns for Region, Site, and Plot Reference. Further down are checkboxes for Price Range and Minimum Bedrooms. The right sidebar, titled 'Follow Ups & Appointments', shows a list of comments and appointments. Five numbered red circles (1-5) are placed next to specific entries in the 'Comments' section, indicating actions taken by the broker.

Broker details are captured in the 'Comments' section, along with any actions/comments from the Broker. This is an example of how it could look should a Broker have to reschedule or cancel an appointment.

- 1 Your comments.
- 2 Broker's Confirmation (Receipt of Email).
- 3 Broker Schedules an Appointment/Follow Up Call.
- 4 Broker Reschedules an Appointment/Follow Up Call.
- 5 Broker Cancels an Appointment/Follow Up Call.