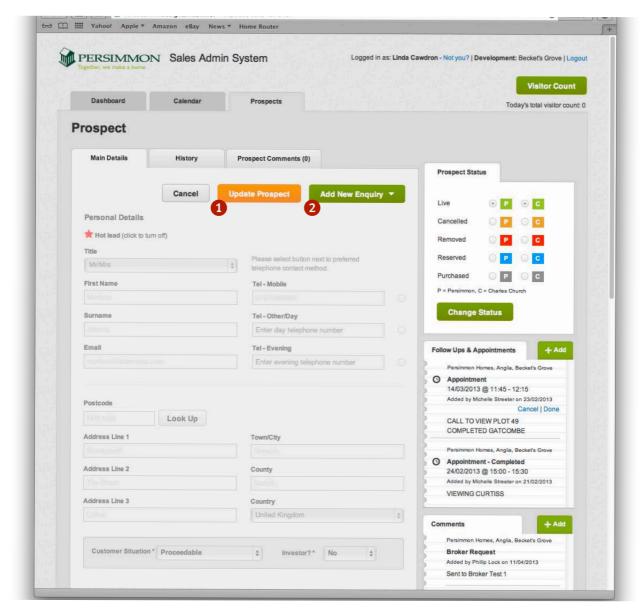
Existing Prospect - Add New Enquiry or Update Details

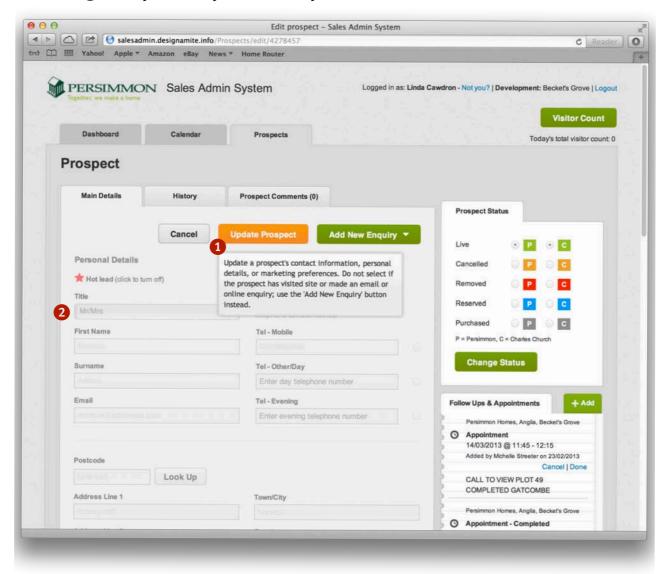


To update an existing prospect you have two options:

- 1 To update contact details, personal details and/or marketing preferences select 'Update Prospect'.

 DO NOT select this option if a prospect Visits, Revisits or makes an Email/Telephone Enquiry.
- To add a Visit, Revisit, or Email/Telephone Enquiry to Head Office/Site (excludes website/portal enquiries), select 'Add New Enquiry'.

Existing Prospect - Update Prospect Details

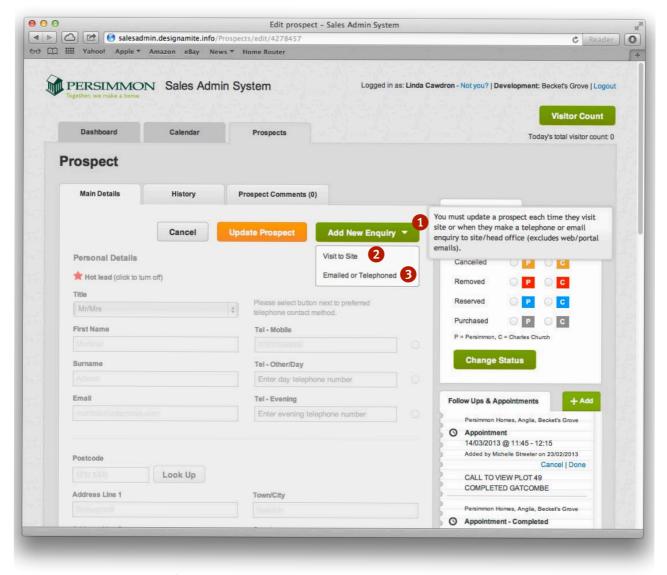


To update a Prospects contact details, personal details, marketing preferences or to mark a prospect as a 'Hot Lead' select the orange button called 'Update Prospect'.

- 1 Select 'Update Prospect'.
- 2 Update Prospect details as before.

Please Note: You cannot add a new site/plot enquiry by this method, you need to select 'Add New Enquiry'.

Existing Prospect - Add a New Enquiry



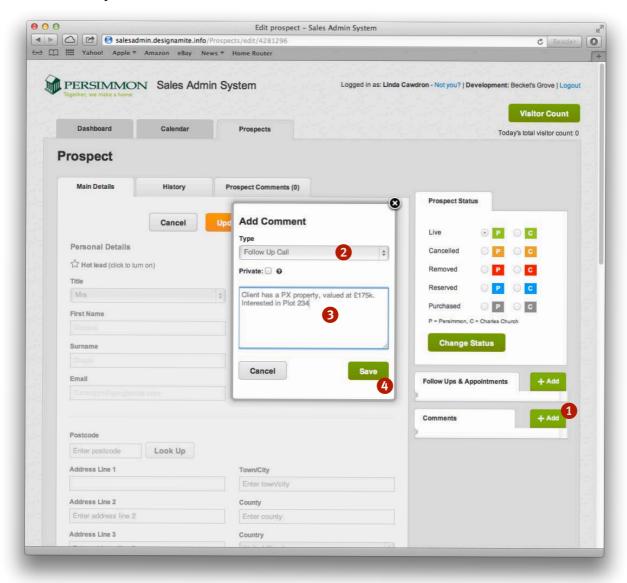
Every Visit, Revisit or Email/Telephone Enquiry* to Site or Head Office, must be added.

- 1 Select 'Add New Enquiry'.
- 2 Select 'Visit to Site' if this is a prospects first Visit or Revisit.
- 3 If a Prospect has Emailed or Telephoned Site or Head Office, select 'Emailed or Telephoned'*.

 PLEASE DO NOT 'Add New Enquiry' and select 'Emailed or Telephoned' if YOU are following up a lead, your actions must be recorded in the 'Add Comments' field on the right-hand side.

^{*} Excludes Persimmon/Charles Church website and Portal enquiries (Rightmove, Smart New Homes, New Homes for Sale etc). These leads are imported daily and can be found in the 'Recent Enquiries' tab. They are not 'real time' leads, but leads up until midnight the day before. You can filter by 'Enquiry Type' Online.

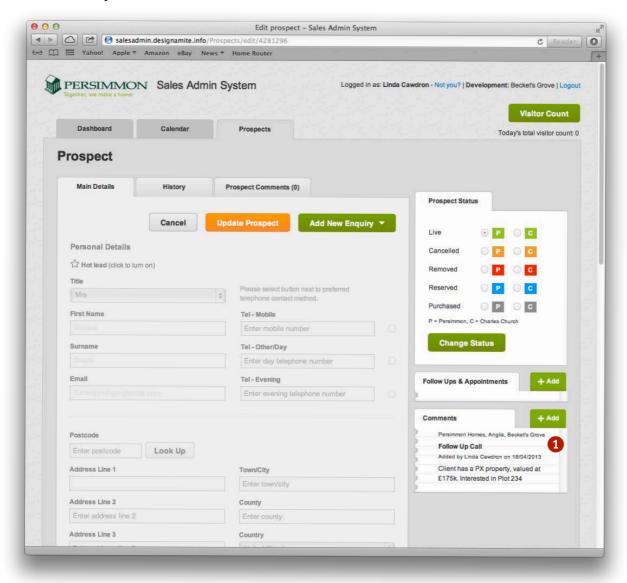
Follow Up Calls



All Follow Up Calls (Answered, Left Message, No Answer) must be added to the 'Add Comments' field on the right-hand side.

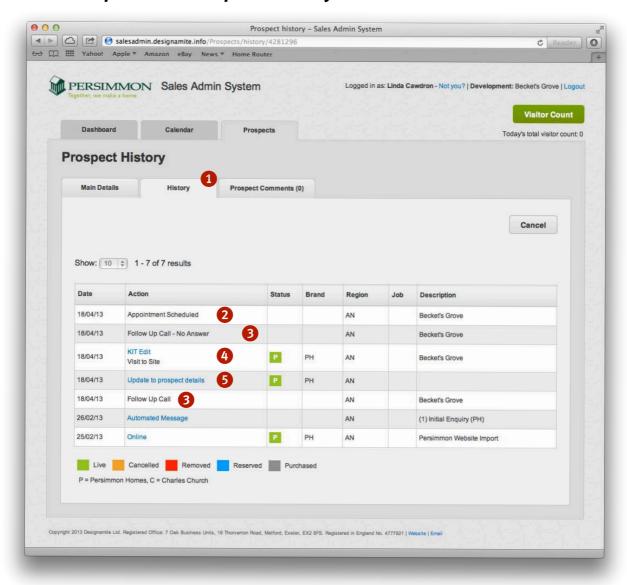
- 1 Click '+Add' to add a new comment.
- 2 Select from the drop down list.
- 3 Add notes
- 4 Click the green 'Save' button.

Follow Up Calls



1 'Follow Up Call' has been logged, along with the notes.

Follow Up Calls - Prospect History

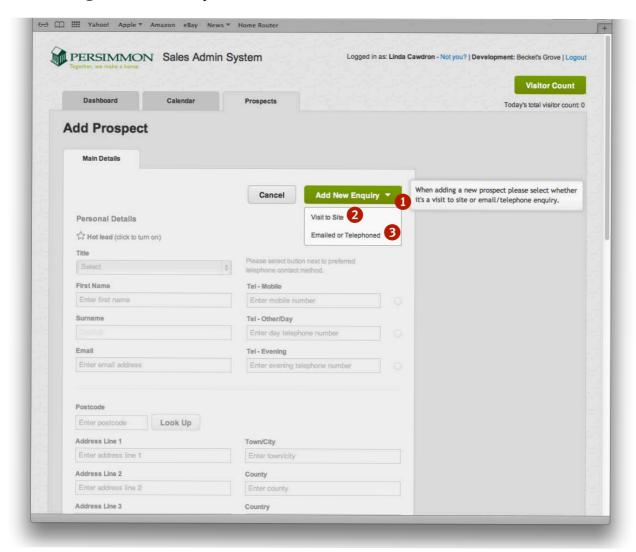


To help you understand how your actions are recorded, select a Prospects 'History' tab.

- 1 History tab click this tab to view a Prospects history.
- 2 If you Scheduled an Appointment it appears in the 'Action' column as 'Appointment Scheduled'.
- 3 If you added a Comment (e.g. 'Follow Up Call', 'Follow Up Call No Answer') it appears in the 'Action' column.
- 4 If you selected 'Add New Enquiry Visit to Site', it appears in the 'Action' column as a 'KIT Edit Visit to Site'.
- If you selected 'Update Details', it appears in the 'Action' column as 'Update to prospect details'.

Please Note: Every action a prospect makes and every action you make, is recorded in the prospect history.

Adding a New Prospect



If a prospect isn't found using the Guided Search, you must select a reason for adding the KIT.

- 1 Select 'Add New Enquiry'.
- 2 Select 'Visit to Site' if the prospect has Visited Site.
- 3 Select 'Emailed or Telephoned' if the prospect has Emailed or Telephoned site or head office*.

 PLEASE DO NOT 'Add New Enquiry' and select 'Emailed or Telephoned' if YOU are following up a lead, your actions must be recorded in the 'Add Comments' field on the right-hand side.

^{*} Excludes Persimmon/Charles Church website and Portal enquiries (Rightmove, Smart New Homes, New Homes for Sale etc). These leads are imported and can be found in the 'Recent Enquiries' tab. They are not 'real time' leads, but leads up until midnight the day before. You can filter by 'Enquiry Type' Online.