

Existing Prospect - Add New Enquiry or Update Details

PERSIMMON Sales Admin System
 Together, we make a home

Logged in as: Linda Cawdron - Not you? | Development: Becket's Grove | Logout

Dashboard Calendar Prospects

Visitor Count
 Today's total visitor count: 0

Prospect

Main Details History Prospect Comments (0)

Cancel **Update Prospect** **Add New Enquiry**

Personal Details

★ Hot lead (click to turn off)

Title: Mr/Mrs
 First Name: Michelle
 Surname: Adams
 Email: michelle.adams@persimmon.co.uk
 Postcode: MK9 5AB
 Address Line 1: Stonywell
 Address Line 2: The Street
 Address Line 3: Colton
 Town/City: Newn
 County: Norfolk
 Country: United Kingdom

Tel - Mobile: 07999 999999
 Tel - Other/Day: Enter day telephone number
 Tel - Evening: Enter evening telephone number

Customer Situation: Proceedable Investor?: No

Prospect Status

Live	☐ P	☐ C
Cancelled	☐ P	☐ C
Removed	☐ P	☐ C
Reserved	☐ P	☐ C
Purchased	☐ P	☐ C

P = Persimmon, C = Charles Church

Change Status

Follow Ups & Appointments

Persimmon Homes, Anglia, Becket's Grove

Appointment
 14/03/2013 @ 11:45 - 12:15
 Added by Michelle Streeter on 23/02/2013
 Cancel Done

CALL TO VIEW PLOT 49
 COMPLETED GATCOMBE

Persimmon Homes, Anglia, Becket's Grove

Appointment - Completed
 24/02/2013 @ 15:00 - 15:30
 Added by Michelle Streeter on 21/02/2013
 VIEWING CURTISS

Comments

Persimmon Homes, Anglia, Becket's Grove

Broker Request
 Added by Phillip Lock on 11/04/2013
 Sent to Broker Test 1

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.
- 2 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

Edit prospect – Sales Admin System

salesadmin.designamite.info/Prospects/edit/4278457

Yahoo! Apple Amazon eBay News Home Router

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Visitor Count
Today's total visitor count: 0

Dashboard Calendar **Prospects**

Prospect

Main Details History Prospect Comments (0)

Cancel **Update Prospect** Add New Enquiry

Personal Details
★ Hot lead (click to turn off)

Title
Mr/Mrs

First Name
Michelle

Surname
Adams

Email
michelle@persimmon.co.uk

Postcode
WA14 8AD

Address Line 1
St James Court

Tel - Mobile
079 56000000

Tel - Other/Day
Enter day telephone number

Tel - Evening
Enter evening telephone number

Town/City
Preston

Prospect Status

Live ☒ P ☐ C
Cancelled ☐ P ☐ C
Removed ☐ P ☐ C
Reserved ☐ P ☐ C
Purchased ☐ P ☐ C
P = Persimmon, C = Charles Church

Change Status

Follow Ups & Appointments + Add

Persimmon Homes, Anglia, Becket's Grove

Appointment
14/03/2013 @ 11:45 - 12:15
Added by Michelle Streeter on 23/02/2013
Cancel Done

CALL TO VIEW PLOT 49
COMPLETED GATCOMBE

Persimmon Homes, Anglia, Becket's Grove

Appointment - Completed

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

Edit prospect - Sales Admin System

salesadmin.designamite.info/Prospects/edit/4278457

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Visitor Count
Today's total visitor count: 0

Prospect

Dashboard Calendar Prospects

Main Details History Prospect Comments (0)

Cancel Update Prospect Add New Enquiry

Personal Details

★ Hot lead (click to turn off)

Title: Mr/Mrs

First Name: Morfica

Surname: Adams

Email: morfica@adamsah.com

Postcode: NN16 8AJ

Address Line 1: Stonywell

Town/City: Nuneaton

Tel - Mobile: 07510055555

Tel - Other/Day: Enter day telephone number

Tel - Evening: Enter evening telephone number

Please select button next to preferred telephone contact method.

Visit to Site

Emailed or Telephoned

You must update a prospect each time they visit site or when they make a telephone or email enquiry to site/head office (excludes web/portal emails).

Cancelled P C

Removed P C

Reserved P C

Purchased P C

P = Persimmon, C = Charles Church

Change Status

Follow Ups & Appointments + Add

Persimmon Homes, Anglia, Becket's Grove

Appointment

14/03/2013 @ 11:45 - 12:15

Added by Michelle Streeter on 23/02/2013

Cancel Done

CALL TO VIEW PLOT 49

COMPLETED GATCOMBE

Persimmon Homes, Anglia, Becket's Grove

Appointment - Completed

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

The screenshot shows the 'Edit prospect' page in the Sales Admin System. A modal dialog titled 'Add Comment' is open, overlaying the 'Main Details' tab. The dialog has a 'Type' dropdown menu (annotated with a red circle 2) currently set to 'Follow Up Call'. Below it is a 'Private' checkbox. A text area (annotated with a red circle 3) contains the text: 'Client has a PX property, valued at £175k. Interested in Plot 234'. At the bottom of the dialog are 'Cancel' and 'Save' buttons (annotated with a red circle 4). In the background, the 'Prospect Status' section shows a table of status options with 'P' (Persimmon) and 'C' (Charles Church) radio buttons. The 'Comments' section at the bottom right has a '+ Add' button (annotated with a red circle 1).

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

salesadmin.designamite.info/Prospects/edit/4281296

Yahoo! Apple Amazon eBay News Home Router

PERSIMMON Sales Admin System
Together, we make a home

Logged in as: Linda Cawdron - [Not you?](#) | Development: Becket's Grove | [Logout](#)

Visitor Count
Today's total visitor count: 0

Dashboard Calendar **Prospects**

Prospect

Main Details History Prospect Comments (0)

[Cancel](#) [Update Prospect](#) [Add New Enquiry](#)

Personal Details
☆ Hot lead (click to turn on)

Title
Mrs

First Name
Victoria

Surname
Davies

Email
Tusardjprill@gmail.com

Postcode
Enter postcode [Look Up](#)

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
Enter country

Tel - Mobile
Enter mobile number

Tel - Other/Day
Enter day telephone number

Tel - Evening
Enter evening telephone number

Prospect Status

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

P = Persimmon, C = Charles Church

[Change Status](#)

Follow Ups & Appointments [+ Add](#)

Comments [+ Add](#)

Persimmon Homes, Anglia, Becket's Grove

Follow Up Call

Added by Linda Cawdron on 18/04/2013

Client has a PX property, valued at £175k. Interested in Plot 234

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

Follow Up Calls - Prospect History

Prospect history - Sales Admin System

salesadmin.designamite.info/Prospects/history/4281296

Yahoo! Apple Amazon eBay News Home Router

PERSIMMON Sales Admin System
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Logged in as: Linda Cawdron - Not you? | Development: Becket's Grove | Logout

Visitor Count
Today's total visitor count: 0

Dashboard Calendar **Prospects**

Prospect History

Main Details **History** Prospect Comments (0)

Cancel

Show: 10 1 - 7 of 7 results

Date	Action	Status	Brand	Region	Job	Description
18/04/13	Appointment Scheduled			AN		Becket's Grove
18/04/13	Follow Up Call - No Answer			AN		Becket's Grove
18/04/13	KIT Edit Visit to Site	P	PH	AN		Becket's Grove
18/04/13	Update to prospect details	P	PH	AN		
18/04/13	Follow Up Call			AN		Becket's Grove
26/02/13	Automated Message			AN		(1) Initial Enquiry (PH)
25/02/13	Online	P	PH	AN		Persimmon Website Import

■ Live
 ■ Cancelled
 ■ Removed
 ■ Reserved
 ■ Purchased

P = Persimmon Homes, C = Charles Church

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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'.
- 5 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

The screenshot shows the 'Add Prospect' form in the Persimmon Sales Admin System. The form is titled 'Add Prospect' and has a 'Main Details' tab. It includes fields for Personal Details (Title, First Name, Surname, Email), Postcode, Address Line 1, Address Line 2, Address Line 3, Town/City, County, and Country. There are also fields for telephone numbers (Tel - Mobile, Tel - Other/Day, Tel - Evening). A 'Cancel' button and an 'Add New Enquiry' dropdown menu are at the top right. The dropdown menu is open, showing 'Visit to Site' (marked with a red circle 2) and 'Emailed or Telephoned' (marked with a red circle 3). A red circle 1 is next to the 'Add New Enquiry' button. A tooltip on the right says: 'When adding a new prospect please select whether it's a visit to site or email/telephone enquiry.' A 'Visitor Count' box at the top right shows 'Today's total visitor count: 0'.

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.**