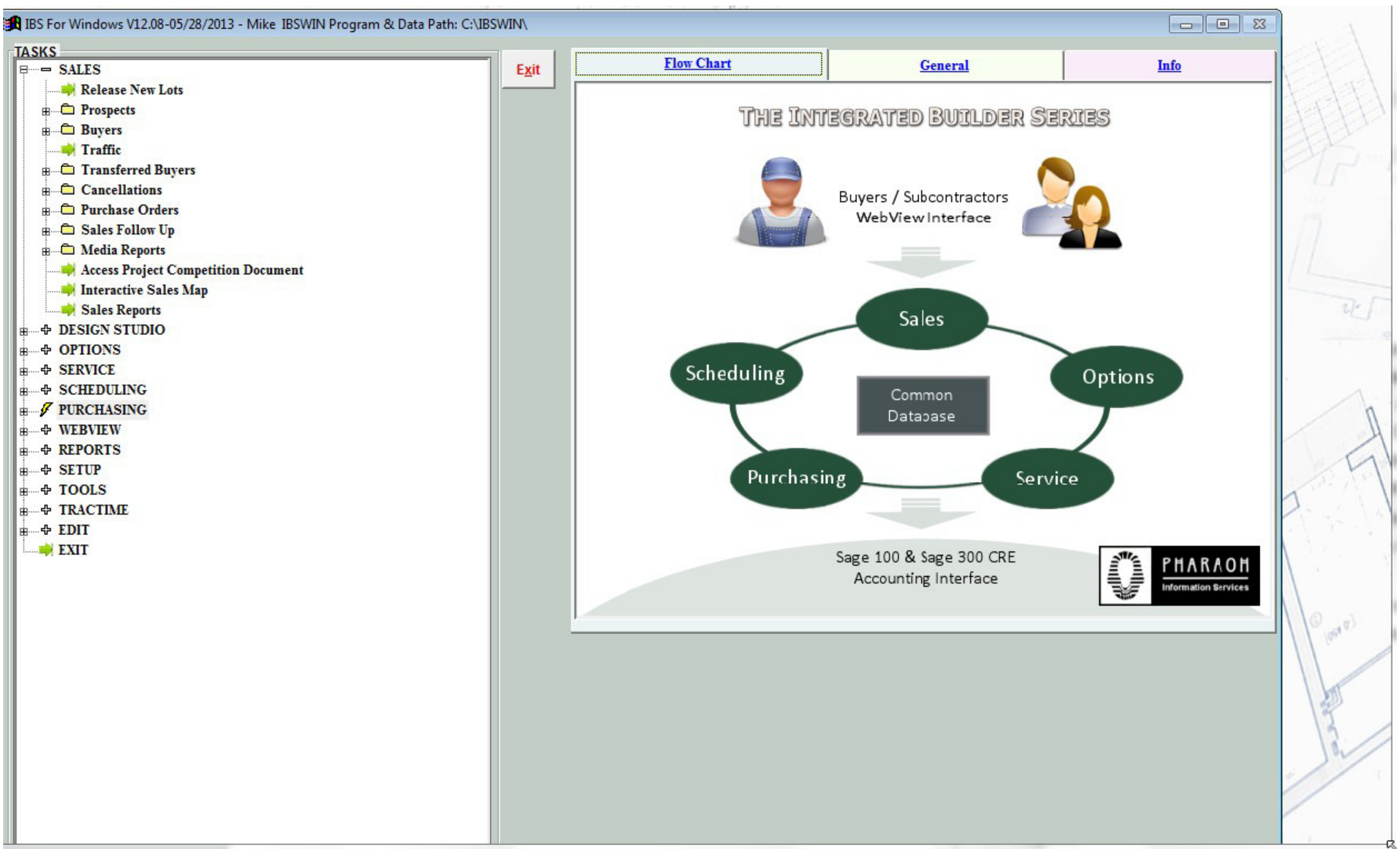
Sales Manager Plus

for *IBSWIN*

(Version 12.XX)

Expanded User Guide



Pharaoh Information Services, Inc.

Phone: (866) 813-0398

Fax: (949) 748-5142

www.ibswin.com

IBSWIN *– Sales Manager Plus User Guide*

Document No. IBS-8.7-061299-SM

Printed and bound in the United States of America

PHARAOH

Integrated Builder Series

Phone: (866) 813-0398 • Fax: (949) 748-5142

Departmental E-mail Contacts:

Sales: sales@ibswin.com

Customer Support: support@ibswin.com

General Information and Assistance: info@ibswin.com

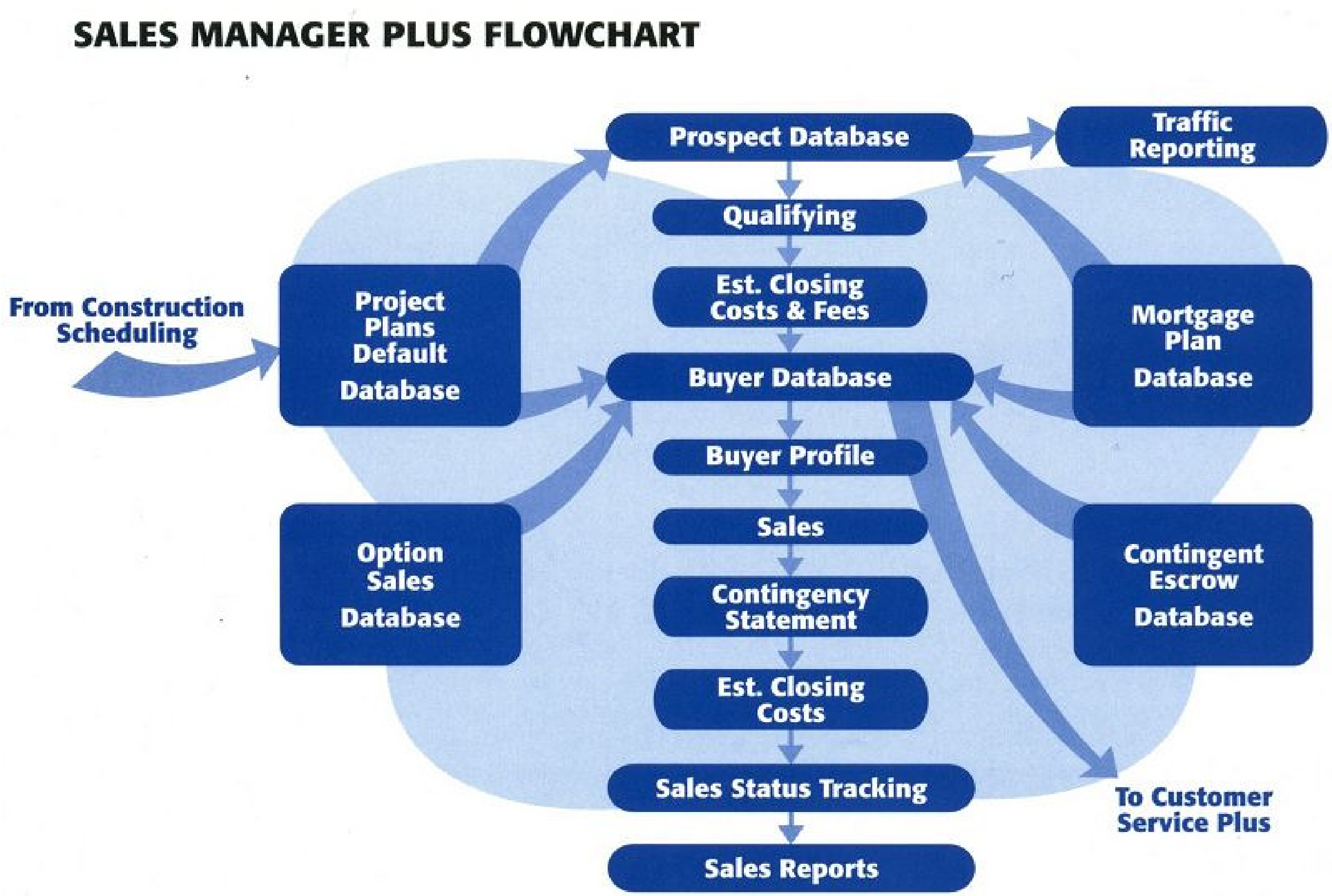
Visit our website for free software updates, FAQ's, full customer and technical support, and the latest developments in our *IBSWIN* line of software.

www.ibswin.com

Table of Contents

Introduction

Sales Manager Plus provides your sales and marketing department with the tools necessary to track your prospects from the time they visit your model homes to the time they happily move-in. It automates the buyer qualifying process and provides professional sales reports contracts. It fully automates sales agreement processing and tracks every aspect of the escrow cycle. Designed to run locally or remotely via the internet using cloud services, you can link all your sales offices together, with corporate and use sales manager plus as your one-stop sales solution.



Real-time Communication of Sale Information

Using Microsoft Terminal Services® or Citrix® your sales offices can link through the internet to your corporate database.

Traffic Reporting & Prospect Analysis

Provides the tool to track your model traffic and analyze the source of these prospects.

Automated Letter preparation

Prospect and buyer follow up letters can be prepared automatically via a simple mail merge with Microsoft Word.

Prequalifying Reports

Prequalify potential buyers by inputting valuable information on the quality of each prospect, as well as, providing professional looking documents to give to your potential home buyer.

Option Sales Automation

Provides for entry of all sales options by category and prepares option order paperwork.

Sales Agreement Preparation

Provides complete sales agreement preparation and printing of key sales documents including contingent escrows. In addition, buyer demographic information can be captured at this time for later analysis.

Mortgage Plan Alternatives

Mortgage module provides method of entering all potential financing alternatives so that sales prospects can see all the options available to them.

Key Escrow Date Tracking

Sales status provides tracking of all key dates and activities through the close of escrow and buyer move in.

InterestView – Capture Prospects from your Website

Pharaoh's Web based add-on to Sales Manager Plus, InterestView, provides an automated way to capture prospects from your Website and downloads them into Sales Manager Plus. It also provides fully automated Web blast to prospects and enables "targeted" marketing plans.

Sales Manager Plus is designed to make your sales and marketing department more productive by reducing redundant data entry and providing all your sales reports with a "button push."

Sales & Marketing Specific Set-up

This user guide will assist you with setup of all the sections related specifically to the ***Sales Manager Plus*** module. For information on how to set-up the main IBSWIN database, which includes project and lot information, please refer to the ***General Setup & Configuration User Guide***.

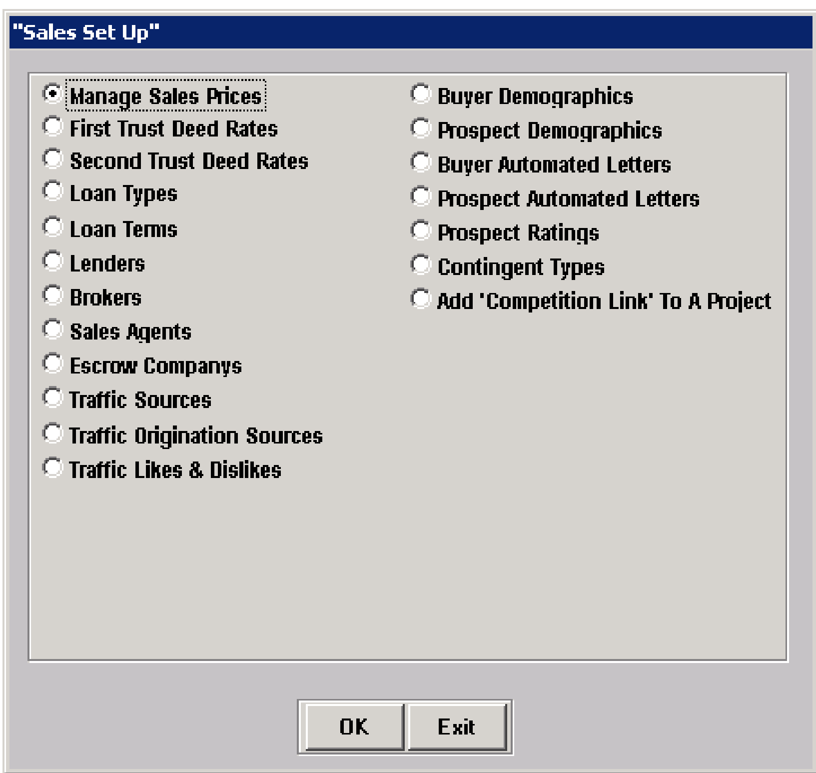
Some of what you will learn include:

- How to enter and track prospects
- How to pre-qualify prospects and/or potential buyers with loans
- How to convert prospects to buyers and enter sales related information
- How to generate sales contracts and escrow related documents
- How to track and report sales
- How to track traffic and report on marketing and demographics

All ***Sales Manager Plus*** setup screens can be found under the main **Setup: Sales** menu.

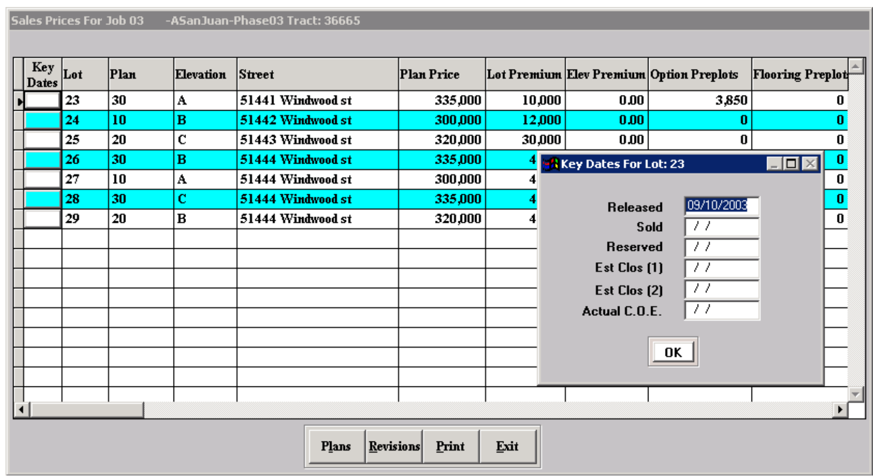
Restricted or limited access can be given to many of these set-up related screens to give your sales people (or even loan officers) the ability to input and maintain certain data without accessing other main areas of *IBSWIN*. Please refer to the ***General Set-up and Configuration User Guide*** for more information about user security.

Please note that many of the features in this section of the user guide are mostly applicable for production builders. We decided to leave it in this *MasterView Guide* so that you can determine if it can be useful to your business or not.



Manage Sales Prices

The ***Manage Sales Prices*** screen is a basic alternative to the main ***Sequence Sheet*** screen where you can update, or add, pricing information for each of the lots offered for sale in any given project. This screen will list all the lots that have been set-up. In the main ***Sales Manager Plus*** module each lot must be be released for sale as they are ready to be sold. Please refer to page 17 for details.



Here you can manage the ***Plan Price***, ***Lot Premium***, ***Elevation Premium***, ***Option Pre-Plots*** (only if you are <u>not</u> using the Options Plus module), ***Flooring & Windows Pre-Plots***.

The combination of each column will determine the ***Base Price*** which is the ***Sales Price*** that will appear over in the sales module. We also have a column for ***Manager Adjustment*** to offer discounts and adjustments to determine the ***Adjusted Sales Price*** if applicable.

The ***Key Dates*** button on the far left also allows you to input or view certain key dates can also be input and found in the main sales screens that your Sales Agents will be using. Please note that if a lot has a Sales Date or Actual C.O.E. date, you will not be able to adjust any of the price columns. By temporarily removing these dates through this button, you can remove these restrictions.

There are also some very useful reports that can be printed from this screen along with being able to manage the ***Plans*** available and track any sequence sheet ***Revisions***.

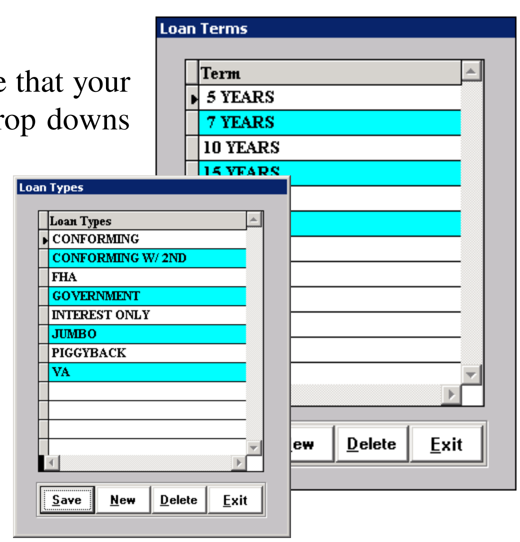
Setting up Loans for Pre-qualifying Prospects or Buyers

If you would like to pre-qualify prospects or buyers in ***Sales Manager Plus***, you will first need to set-up each of the loan programs that your preferred lenders offer.

To set up your ***First*** and ***Second Trust Deeds*** you must make sure that your ***Loan Types*** and ***Loan Terms*** are defined correctly as they are drop downs used to set-up your different loans.

Loan Types & Loan Terms

Each of these screens allow you to predefine the type of loans offered by your preferred lenders and also the length or duration



of the loans. These screens show up as a drop down in the ***First*** and ***Second Trust Deed*** screens as applicable.

It is important that if you offer any ***VA***, ***FHA***, ***Interest Only***, or ***Piggyback*** loans that you set them up named exactly as we name them here. In the case of ***VA*** you can specific the type after the initials e.g. ***VA - Disabled***. For these loan types, this is required so that in the main ***First Trust Deed Rates*** screen can recognize them and either allow you to input additional information for these loans, and/or to ensure the loan payments calculated correctly where applicable.

First Trust Deed Rates

Here you will enter all possible loan combinations for the First Trust Deeds that you have to offer your clients.

Simply select **New** to enter a new loan program, then select the ***Type*** of loan from the drop-down as defined in the Loan Type screen.

The current default options available are: ***Conforming***, ***Government***, ***Jumbo***, ***Piggyback***, ***FHA***, ***VA – Disabled Vet***, ***VA – First Time***, ***VA – Multiple User***, ***VA – National Guard***, and ***Interest Only***.

Loan Type	Term	Rate Type	Rate	Points	Margin	Cap	Minimum Down %	PMI % LTV >80	PMI % LTV >90	PMI % LTV >=95	Min Loan
CONFORMING	7 YEAI	FIXED	4.250	0.00	0.00	0.00	0.00	1.25	0.00	0.00	0
CONFORMING	7 YEARS	FIXED	4.000	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0
CONFORMING	15 YEARS	FIXED	5.000	1.00	0.00	0.00	0.00	1.25	0.00	0.00	0
CONFORMING	15 YEARS	FIXED	5.100	0.00	0.00	0.00	0.00	1.25	0.00	0.00	0
CONFORMING	30 YEARS	FIXED	5.500	1.00	0.00	0.00	0.00	1.25	0.00	0.00	0
CONFORMING	30 YEARS	FIXED	5.200	0.00	0.00	0.00	0.00	1.25	0.00	0.00	0
FHA	30 YEARS	ARM	4.750	0.00	0.26	10.00	0.00	0.00	0.00	0.00	0
FHA	30 YEARS	FIXED	5.000	1.00	0.00	0.00	2.85	1.50	0.50	0.00	0
INTEREST ONLY	15 YEARS	FIXED	6.500	0.00	0.00	0.00	0.00	0.50	0.75	0.00	0
INTEREST ONLY	15 YEARS	FIXED	5.250	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
JUMBO	5 YEARS	FIXED	5.750	0.00	0.00	0.00	0.00	1.25	0.00	0.00	0
JUMBO	7 YEARS	FIXED	5.750	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0
JUMBO	15 YEARS	FIXED	5.950	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0
JUMBO	30 YEARS	FIXED	5.875	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0
JUMBO	30 YEARS	FIXED	5.625	1.00	0.00	0.00	0.00	1.00	0.00	0.00	0
PIGGYBACK	5 YEARS	ARM	5.500	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0
PIGGYBACK	15 YEARS	FIXED	5.750	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0

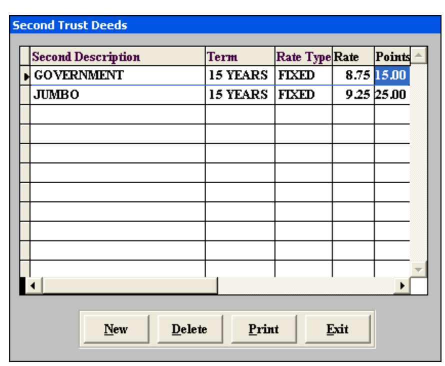
Then select the ***Term*** of the loan, and enter the ***Rate Type***, ***Rate***, and ***Points***. If you selected ***ARM*** as the rate type then you will need to enter the ***Margin*** and ***Cap*** for that loan. Finally complete the remaining fields as required.

If you select and ***FHA***, ***VA***, or ***Piggyback*** loan the applicable buttons on the bottom left of the screen will become active allowing you to input additional information for those particular loan types.

Each loan set-up in this screen will be available for selection in either the prospect or buyer screens for pre-qualifying and reporting purposes. See page 23 for details.

Second Trust Deeds

This is a simple screen where you can enter any secondary loans offered. As with above, select **New** and enter the details for each column of information required.



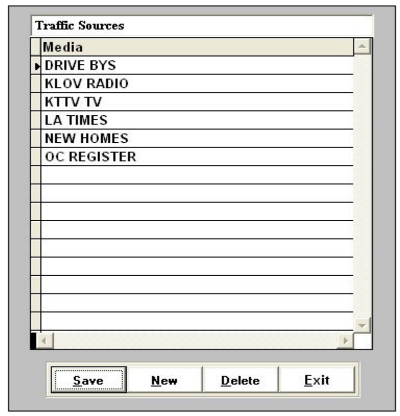
Second Description	Term	Rate Type	Rate	Points
GOVERNMENT	15 YEARS	FIXED	8.75	15.00
JUMBO	15 YEARS	FIXED	9.25	25.00

Lenders, Brokers, Sales Agents, & Escrow Companies

Each of these tables are used to create dropdown menus that are used in the Sales module to either update the ***Sales Escrow Tracking*** screen (page 29) or in the case of ***Traffic Sources*** for tracking visitors or prospects (see page 31). The navigation of each screen begins with the **New** button to add a new line item. Enter the information in each column as completely as desired or necessary.

Traffic Sources & Traffic Origination Sources

Sales Manager Plus allows you to track and record the number of visitors to a specific project by the Traffic Source (referral advertising media) or by Origination.

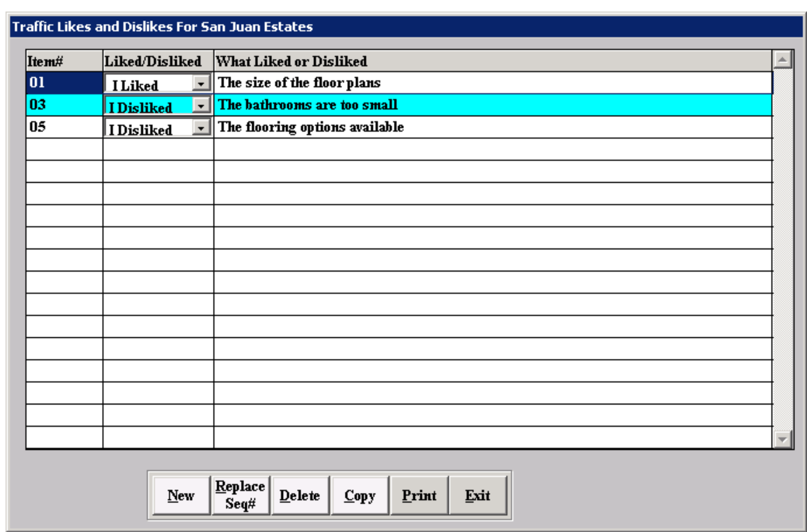


Select **Setup: Sales: Traffic Sources** or **Traffic Origination** from the main menu. By using the **New** button you can enter in all various traffic sources or origination sources that you would like to track by project.

These screens provide a global list which can be selected on a weekly basis (per project) from within the traffic section of ***Sales Manager Plus***. (please refer to page 31 for more information)

Traffic Likes & Dislikes

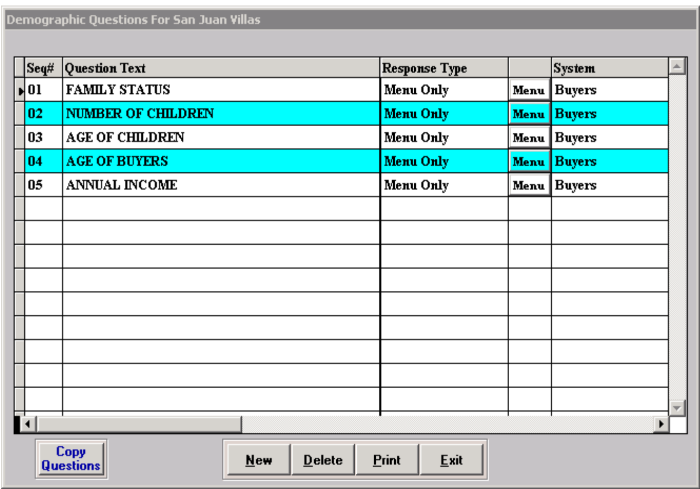
Similar in set-up as the previous traffic screens, the ***Traffic Like & Dislikes*** screen allows you to set-up a predefined list, in this case of items that visitors would like or dislike about your community or the houses that they have seen. This additional tracking allows you to track more information about your prospects and to better deal with objections or to provide better service in the future.



The main difference with this screen is that when you add a **New** item, you must enter an ***Item#*** that allows you order the Likes and Dislikes. Since these are entered on a per project basis there is a **Copy** button to allow you to copy this list to different projects.

Buyer and Prospect Demographics

Customer demographic information for both buyers and prospects can be tracked and recorded from within ***Sales Manager Plus***. The questions/information that you gather from your prospects or buyers can easily be setup from the **Demographics** menu item under **Setup: Sales** by selecting the respective menu item.

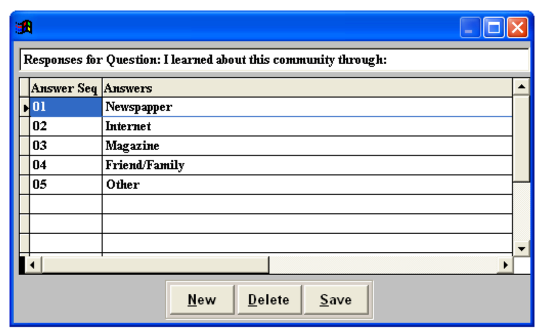


In this screen you will be entering your visitor or questionnaire card or you can even generate the survey that they would fill out. By selecting **New** enter the ***Question Text*** and then select the ***Response Type***. You have 3 options to choose from: ***Menu + User Entry***, ***Menu Only***, ***User Entry Only***.

Menu means that the visitor has menu items to select from (i.e. multiple choice selections) and ***User Entry*** means that the response is a more in-depth written answer that cannot be defined by menu selection. Just select the ***Response Type*** based on the type answers the question requires.

If you select a **Request Type** with ***Menu*** in it, for any of your Questions, then select the ***Menu*** button in the 4th column will become active. A small screen will open (pictured right), which will allow you to enter the menu items (multiple choice answers).

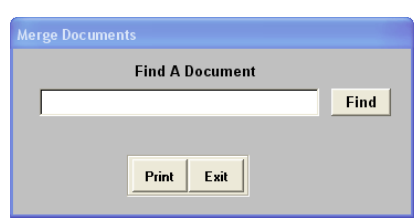
The ***Print*** button a will allow you to print your list of questions and the associated menu responses.



Creating Buyer or Prospect Merge Letters and Documents

Sales Manager Plus can use your existing letters or documents (created in Microsoft Word) to generate a customized letter or sales contract for either a Prospect, Buyer, or even a Subcontractor, with a click of a button. By simply inserting ***Sales Manager Plus*** merge fields from within Word you can create a generic merge template for each type of letter you use and each time you print it from within our system any personalized information (e.g. recipient name, contact details, and any project/phase information, etc) will be inserted automatically from ***Sales Manager Plus***.

To create a merge (letter) template you will need to have either an existing letter or document (created in Word). To insert the merge fields to be populated by ***Sales Manager Plus*** start by selecting **Setup: Merge**



Documents & Templates: Buyer Merge Documents or **Prospect Merge Documents**. Using the **Find** button, browse and select the letter you wish to modify (or want to insert merge fields into) and select **Print**. Word will open twice.

The first instance of Word will open your letter as a template and the second will attempt to generate a customized letter (called Form Letter 1). As we are not generating any letters nothing noticeable will happen and you can just ignore (or close) the form letter. However, when viewing your template you will see a new menu/toolbar that is now available to you in Word. This tool bar will assist you in inserting your merge fields. To do this you will use the **Insert Merge Fields** button which, depending on your version of word the button will appear as either a picture (see right) or as a button visibly named **Insert Merge Fields**. Generally it will be located to the immediate left of the **Insert Word Fields** button which is used to insert Microsoft Word fields. If you wanted to insert the today's date into your document you would use this button to do so.

When you select the **Insert Merge Fields** button, a list of all the merge fields available to you (from ***Sales Manager Plus***) will appear ready to be inserted into your template letter. This is as simple as pointing your cursor to a specific location in your document where you would like your merge field to be inserted, press the **Insert Merge Fields** button, and select the field you want. A special place holder will be inserted into your document which will automatically be filled in with your data when you generate your letters. Keep inserting as many merge fields as you need and save this new merge document template for future use. (Examples of merge letter templates can be found directly in the *IBSWIN* folder).

Processing/generating custom letters

There are three (3) ways that custom letters can be generated in the ***Sales Manager Plus*** System:

1. **One letter at a time** - This is done from within the Buyer or Prospect screen**.** With the buyer (or prospect) screen open select **Print: Buyer (or Prospect) Letter** which will allow you to select one specific letter/document to be generated for the current buyer. This is used to send follow up letters to your buyers or Prospects for whatever reason. The Customer Service Plus module also has a similar function which can generate Warranty Letters for your buyers.

2. **Letters to Groups -** This can be done for both Prospects (see page 17) and Buyers (see page 21) to generate your desired letter for a group of people at one time. (Buyers can also be done from within the Customer Service module in relations to service requests)

3. **Automated Letters** *(customer service & sales modules only)* – See below.

When either one or more letter has been selected to print Word will always open twice. The first instance is your merge document template and the second will be your newly generated form letter with all of your merge fields populated from the information entered in ***Sales Manager Plus***. Then from Word you can print your letter(s). If need be, you can even edit or customize your letters before printing just like you would a normal document.

Buyer & Prospect Automated Letters

Sales Manager Plus uses Microsoft Word to create merge letter templates which you can print and send to your Buyers, Subcontractors, or Prospects.

The ***Automated Letter*** feature provides a way of scheduling these merge letter templates to be sent out on a specific day based on either the prospects ***visit date*** or the ***sale date*** for a buyer. To setup an automated letter go to the **Setup: Sales: Buyer** or **Prospect Automated Letters** menu and select which type of letter (Buyers, or Prospects) you wish to schedule.

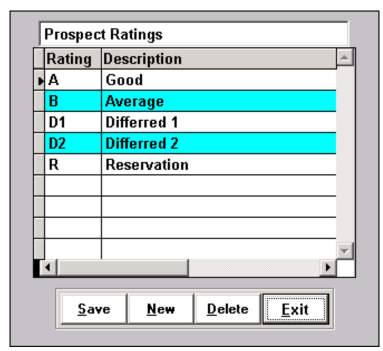
The window to the right (or similar) will open. **New** will allow you to browse your computer and select the document you wish to be scheduled. By highlighting the merge letter template/document and clicking on **Select,** the document name and location will automatically be inserted into the ***Drive/Directory/Document*** field.

Enter a logical ***Description*** for the letter followed by the number of days to schedule the letter. In the case of Prospects it would be the number of days from the ***Original Visit date*** or the number of ***Days before 2nd Estimated close Date*** for buyers (found in escrow screen).

> **Note:** Any letter set up as an automated letter needs to remain in the same folder/location. If it is moved then ***Sales Manager Plus*** will not find the file. In that case you must then create a new entry in the Automated Letters screen (and delete the old one). The same is the case if you change the name of the file (document).

To save the newly scheduled letters and exit this screen select **Save**. To remove a scheduled letter simply highlight it and use the **Delete** button.

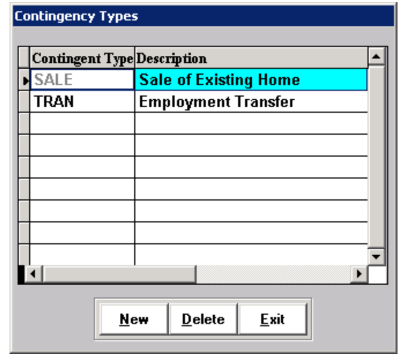
Prospect Ratings



This is a simple screen that allows you to set up a predefined list of ratings to qualify your prospects with. The Rating can be any combination of letter or number. However, and R Rating is reserved for reservations. What this does is remove this specific lot from the available inventory. This way the lot cannot be sold to another prospect.

> **Note:** It is recommended that a companywide rating system be established to create consistent and accurate reports. A simple rating system could be: A, B, C… etc.

Contingency Types

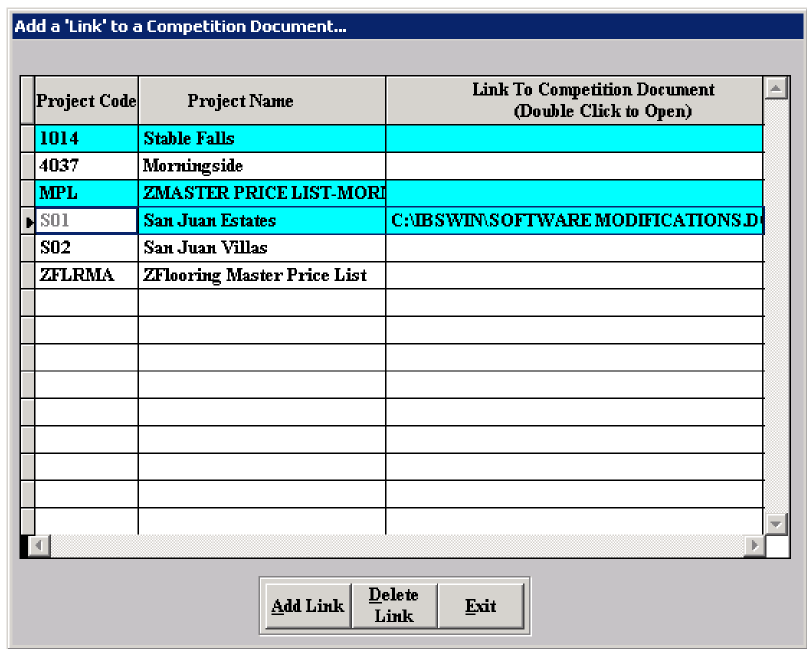


Similar to Prospect Ratings, this screen creates a predefined list of contingency types that can be assigned to a prospect or buyer. This way if a purchase is contingent upon a particular circumstance it will be easy to view and will also display on various reports.

Add Competition Link to a Project

This screen allows you to add or assign any type of document or spreadsheet with competition information to any project for easy access for your sales people that will be accessible from the main ***Sales Manager Plus*** module. This will allow them to get access to any competition data or information that you want.

Simply select the project from the list and click the **Add Link** button to browse for the document you wish to assign.



Note: Any document assigned in this screen needs to remain in the same folder/location. If it is moved then ***Sales Manager Plus*** will not find the file. In that case, you must **Delete the Link** and then reassign the new document as above. The same applies if you change the name of the file.

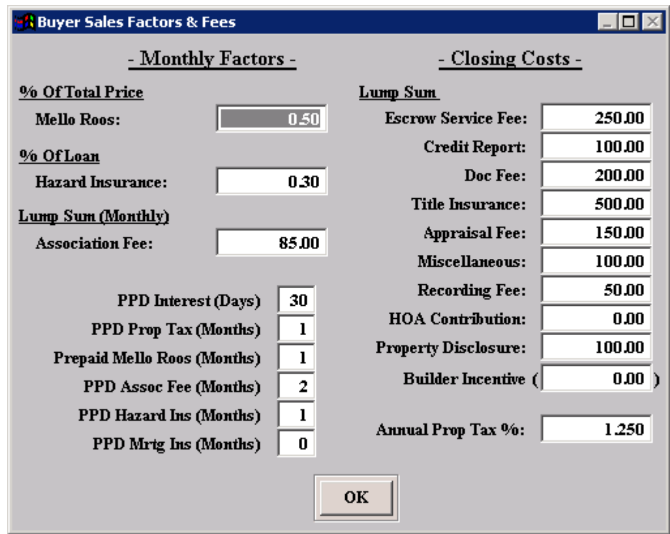
Project Specific Fees and Costs

Sale Manager Plus allows you to set-up any Fees and Costs (by project) that are required for obtaining loans and/or purchasing a home. Once setup, they will automatically appear in the prospect and buyer screens to automate the pre-qualifying process and provide a more accurate estimate of the cost involved in purchasing a home for the buyer.

Sales Costs
(Standard Loan Factors & Fees)

To enter the default loan fees and costs by project you need to go to ***Setup: Inventory: Projects***. After entering the project screen you will see a **Sales Costs** button at the bottom. Select this for the screen (pictured) to open.

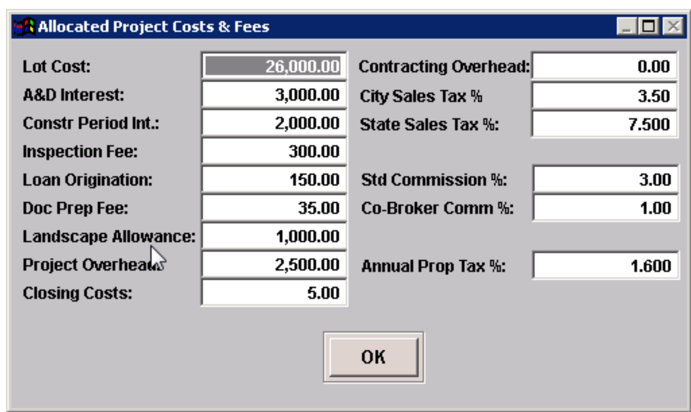
Enter the figures relevant to the selected project. These will appear by default in all the prospect and buyer screens to increase the accuracy of the pre-qualification of your prospective buyers.



Overhead Costs
(Allocated Costs and Fees)

Similar to the previous screen and found in the same location ***Setup: Inventory: Projects*** select the **Overhead Cost** button this time to enter the applicable information.

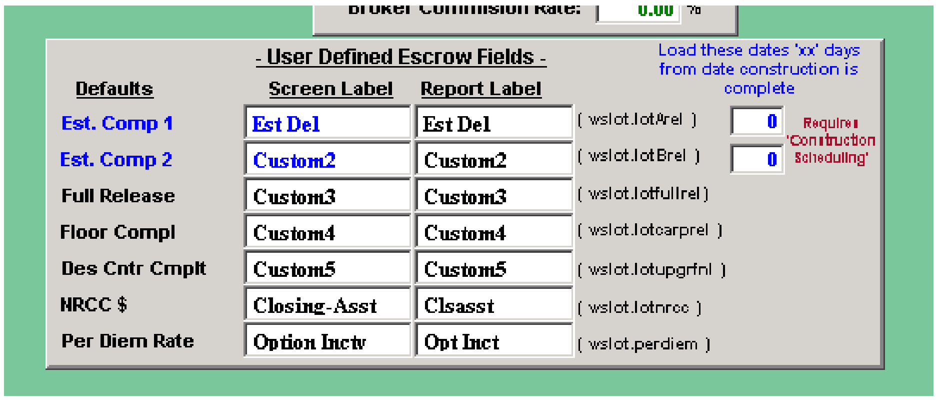
Enter the figures relevant to the selected project. These will appear by default in the Lot Costs & Profit Summary report that can be run out of the Options Plus module.



User Defined Escrow Fields

Found in **Setup: Company Config** under the ***Sales*** tab, this screen allows you to customize and define how some of the ***Escrow*** screen (see page 29) fields names and labels will appear on screen.

These labels also affect some of the sales reports, specifically the sales escrow flow sheet which can be found under **Reports: Sales Reports: House Flow-Field Escrow**.

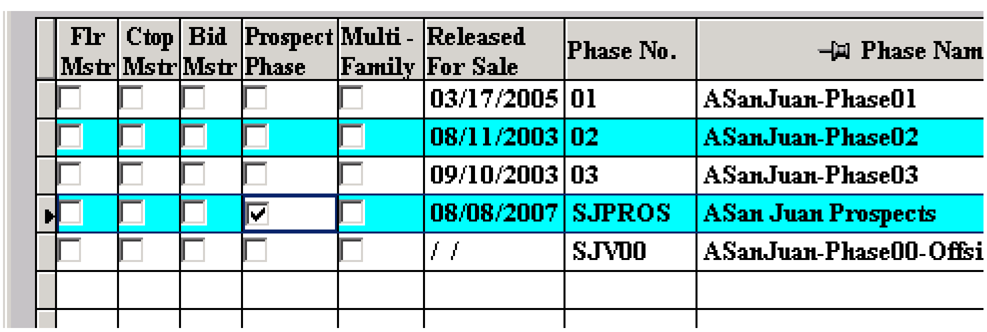


This way you are not limited to the predefined IBSWIN fields and you can customize and track other custom fields as needed.

Creating a Prospect Phase

To make it easy to manage your prospects for the entire project ***Sales Manager Plus*** allows you to create what is known as a ***Prospect Phase*** which is, in essence, a fake phase that is used as a master prospect list for any given project. It is also ideal to use for bulk mailings or to generate project bases prospect lists.

To create a Prospect Phase all you need to do is go to the main ***Setup: Inventory: Phases*** menu. Then simply click the **New** button to add an additional phase. Please make sure to check it off as a ***Prospect Phase*** and give it a unique name.



Flr Mstr	Ctop Mstr	Bid Mstr	Prospect Phase	Multi - Family	Released For Sale	Phase No.	Phase Nam
☐	☐	☐	☐	☐	03/17/2005	01	ASanJuan-Phase01
☐	☐	☐	☐	☐	08/11/2003	02	ASanJuan-Phase02
☐	☐	☐	☐	☐	09/10/2003	03	ASanJuan-Phase03
☐	☐	☐	☑	☐	08/08/2007	SJPROS	ASan Juan Prospects
☐	☐	☐	☐	☐	/ /	SJV00	ASanJuan-Phase00-Offsi

When **Add**ing a **New Prospect** in ***Sales Manager Plus*** you will be restricted to selecting your new prospect phase. As each prospect decides which lot they are interested in, you will be able to assign to actual construction phase and lot. They will not be removed from the master list. *For more details about prospects, please visit page 18.*

Using the Sales Manager Plus

By selecting **Sales** from the main menu (at the top left of ***IBSWIN***) you will have numerous menu items that allow you to work with, and process, your buyers and prospects efficiently and effectively.

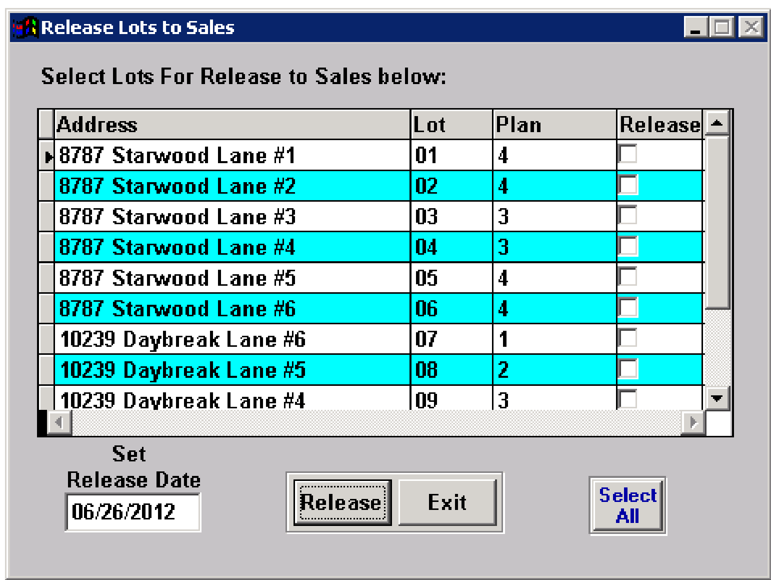
These selections allow you to take a prospect through the qualifying cycle, convert them to a buyer, and finally track the buyer through the escrow cycle. This buyer information is automatically made available to the options and customer service departments as well.

> **Note:** There is a ***MasterView*** version of ***Sales Manager Plus*** that is a little different from the **IBSWIN** counterpart in the way that it allows Buyers (Clients) and jobs to be setup on the fly rather than having them pre-setup in order to enter the buyer info. Contact Pharaoh Support for more information.

With ***Sales Manager Plus*** you will also be able you to track traffic and marketing information related to prospective buyers, turn them into buyers and then process the appropriate sales agreements and contracts.

Release New Lots

In order to assign a prospect or a buyer to a lot you must first release the lots for sale. This is done under the ***Sales: Release New Lots*** menu.

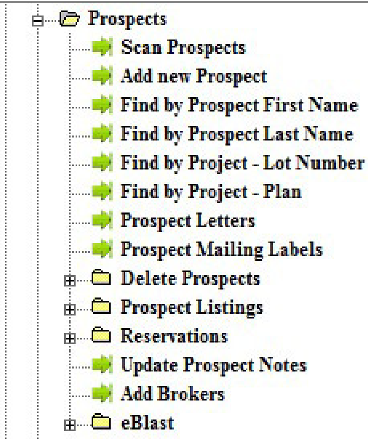


After selecting the Phase you wish to release lots for you will see the screen picture right that will list all the currently unreleased lots.

You can either release a lot at a time or a group of lots by checking the ***Release*** column. If you need to assign a release date other than today's date make sure to enter it in the ***Set Release Date*** field on the bottom left of the screen before clicking the **Release** button.

You are also provided with a **Select All** button for convenience. If you accidently release a Lot that should not be available for sale, then you will need to find the lot in the Buyer screen / Escrow button and remove the release date.

Working with Prospects



Prospects are potential customers that are being qualified and tracked as a potential buyer but have not yet made a buying decision. A prospect can be added and attached to several lots at a time to present them with different buying scenarios for each home they are interested in.

Prospect are generally entered by construction phase. However, in some cases some clients prefer to input their prospects into a mater phase that represents the entire project. Then they can assign prospects to a specific phase/lot combination as they become interested. To do this, please make sure you have set-up a ***Prospect Phase*** as per page 16.

Finding existing prospects

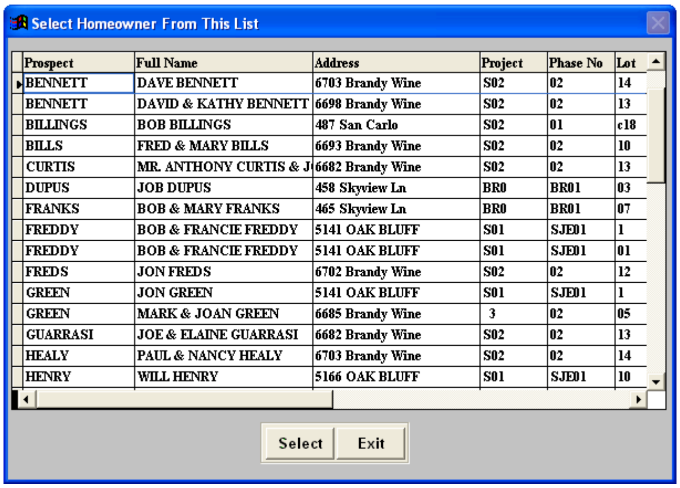
Under the **Sales: Prospect** menu you will be presented with many ways to ***find*** a previously entered prospect, either by ***First*** or ***Last Name*** or ***Project/Phase Lot Number***.

> **Note:** If you leave the ***First*** or ***Last Name*** fields blank when finding a prospect, then entire list of prospects will be listed.

Scan Prospects

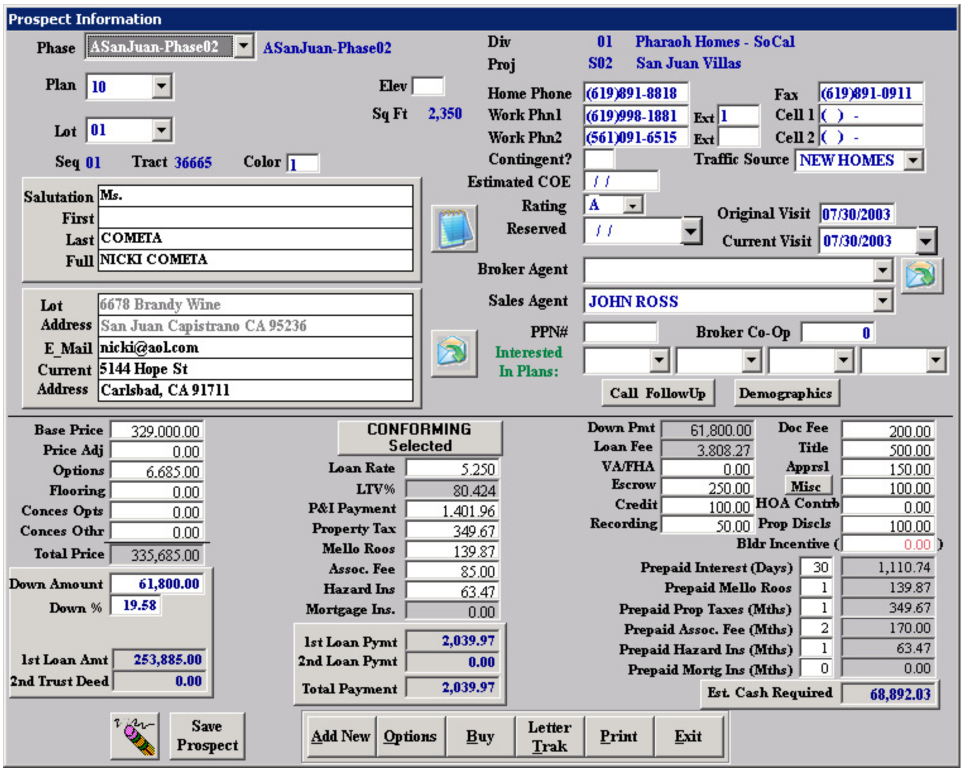
Similar to the ***Find By Prospect Last Name*** this option will ask you to enter your prospects ***Last Name*** to bring up a list of prospects with that same name.

The main difference between ***Scan Prospects*** and ***Find By Last Name*** is that when you exit the prospect screen, you will be returned to the main list of prospects, rather than be prompted to enter a *Last Name* again. This allows you to easily maneuver or scan through multiple prospect screens quickly.



Prospect	Full Name	Address	Project	Phase No	Lot
BENNETT	DAVE BENNETT	6703 Brandy Wine	S02	02	14
BENNETT	DAVID & KATHY BENNETT	6698 Brandy Wine	S02	02	13
BILLINGS	BOB BILLINGS	487 San Carlo	S02	01	c18
BILLS	FRED & MARY BILLS	6693 Brandy Wine	S02	02	10
CURTIS	MR. ANTHONY CURTIS & J	6682 Brandy Wine	S02	02	13
DUPUS	JOB DUPUS	458 Skyview Ln	BR0	BR01	03
FRANKS	BOB & MARY FRANKS	465 Skyview Ln	BR0	BR01	07
FREDDY	BOB & FRANCIE FREDDY	5141 OAK BLUFF	S01	SJE01	1
FREDDY	BOB & FRANCIE FREDDY	5141 OAK BLUFF	S01	SJE01	01
FREDS	JON FREDS	6702 Brandy Wine	S02	02	12
GREEN	JON GREEN	5141 OAK BLUFF	S01	SJE01	1
GREEN	MARK & JOAN GREEN	6685 Brandy Wine	3	02	05
GUARRASI	JOE & ELAINE GUARRASI	6682 Brandy Wine	S02	02	13
HEALY	PAUL & NANCY HEALY	6703 Brandy Wine	S02	02	14
HENRY	WILL HENRY	5166 OAK BLUFF	S01	SJE01	10

Introduction to the Prospect Screen



This is the main prospect screen (right). It allows you to enter, qualify (using different loan programs), and manage your prospective home-buyers.

The first half of the screen is basically the '*prospect card.'* It displays the general contact information along with additional fields for assigning then to a particular ***phase***, ***lot***, or ***plan*** combination, and to other basic information.

The second half of the screen is for prequalifying a prospect by using their personal financial situation in combination with various loan programs on offer (see page 8). Some of the fees, costs, and pricing information may already appear here from other areas of ***Sales Manager Plus***. This section of the prospect screen will assist you in working with the prospect to determine their ability to purchase a lot using different loan programs. The sales person will also be able print out different scenarios for them to take home.

This prequalifying section of the screen is divided into three main sections or columns. The first column calculates the ***Total Price*** of the home, including the cost of any options or upgrades, and incentives offered. It also allows you to enter a deposit amount and/or desired loan amounts for the prospect.

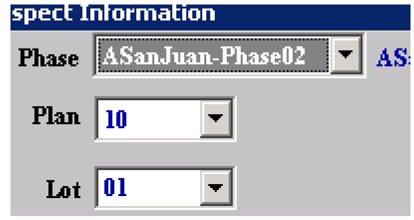
The middle column is strictly finance and loan related. It is used to estimate the prospects potential monthly loan payments, which is displayed at the bottom of that column. Begin by selecting the desired loan program using the **Select Loan** button. After it is selected, it will display the loan type.

The third section to the right displays all the one-time fees or initial/upfront costs required to qualify for the loan program. These can be set-up in advance in the project screen (see page 15) or entered directly on the screen.

Note: As a general rule each field that is white (not grayed out) can be changed and overwritten. Adding or changing an amount will recalculate any of the affected fields.

For a definition of each field in the prospect screen, please refer to Appendix 1 found on page 39 of this user guide.

Adding an New Prospect



To enter a new prospect select **Add New Prospect** from the main Sales menu, and then select the applicable phase. Once the prospect window opens begin by selecting the ***Plan*** and ***Lot*** (if known or applicable) from the drop downs on the top left of the screen.

> **Note:** Only previously released Lots will appear in the drop-down menu. Please see page 17 for details on releasing lots. You can add a prospect without assigning them to a specific plan or lot to have their contact information or until they show interest in a specific lot.

> **Additional Note:** It is possible to specify if a prospect is interested in other plans without actually creating another prospect record. Do this by using the ***Interested in Plans*** section in the middle right of the screen.

Continue entering all the pertinent information for the prospect, including their ***Name***, ***Address***, and any other details as necessary. A warning will appear if a duplicate name is entered in the ***Full Name*** field.

If a lot and plan have been selected then the ***Base Price*** (which is taken from the *Sequence Sheet*), plus any options ordered (***Cash Options*** and ***Fin. Options)*** will be displayed in the relevant fields. The ***Visit Date*** will be automatically assigned to today's date but can be overwritten if the prospect is being entered on another day.

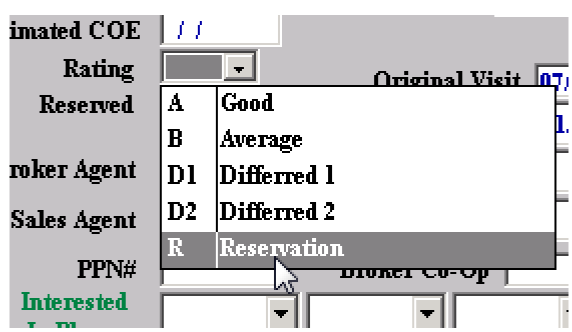
> **Note:** Options or upgrades can be ordered using the **Options** button (on the bottom of the screen), if permissions allow and/or if you have the ***Options Plus*** module. No options ordered can be finalized until the prospect becomes a buyer.

Rating a Prospect

Based on the qualification process (or from your interactions with the prospect) you can assign a rating to your prospect using the ***Rating*** drop-down which will display a predefined list of ratings as set-up in *IBSWIN* (see page 13).

By rating a prospect, you will be able to sort or filter various lists of prospects, and also print certain prospect reports (see page 26). If you want to add more detail to a prospect record then use the **Notes** button. The (R)eserved rating is used for reserving lots as explained below.

Reserving a Lot (Reservations)



In the main prospect screen you are able to put any prospect into a reserved status. Doing so will reserve the current lot assigned to that prospect so that the lot cannot be sold to someone else. This is done simply by using the rating dropdown as described above.

By assigning a prospect to the (R)eserved rating the ***Reserved Date*** will automatically be filled with today's date. You can override this at any time if the actual reservation date is a different.

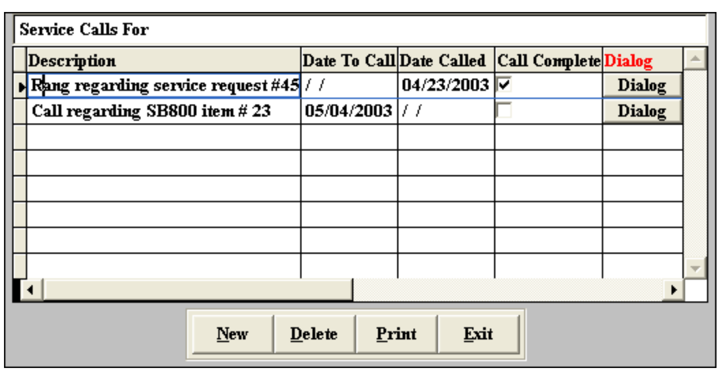
To ***Cancel*** a reservation all you need to do is select rating other than R. Doing so will immediately prompt you to confirm, and will then open a screen (right) for you to track to select the cancel date (if other than today), and will also allow you to enter any notes about the cancellation.

For easy access to find any reserved prospects, or to track cancellations, or print any prospect reports, you can do so from the ***Sales: Prospects: Reservations*** menu.

Scheduling and Tracking Phone calls (Call FollowUp)

The **Call FollowUp** button allows you to keep a historical record of the phone calls made to this prospect and to even schedule reminders for future follow-up calls.

Once selected you will see the following screen (left) which handles both the scheduling of calls (to be made in the future), and the logging of calls as you make them.



To do either, you begin by selecting **New** and entering a brief description of the call that was made (or is to be made) and then using the **Dialog** button you can enter any extended information about the call and are/conversation.

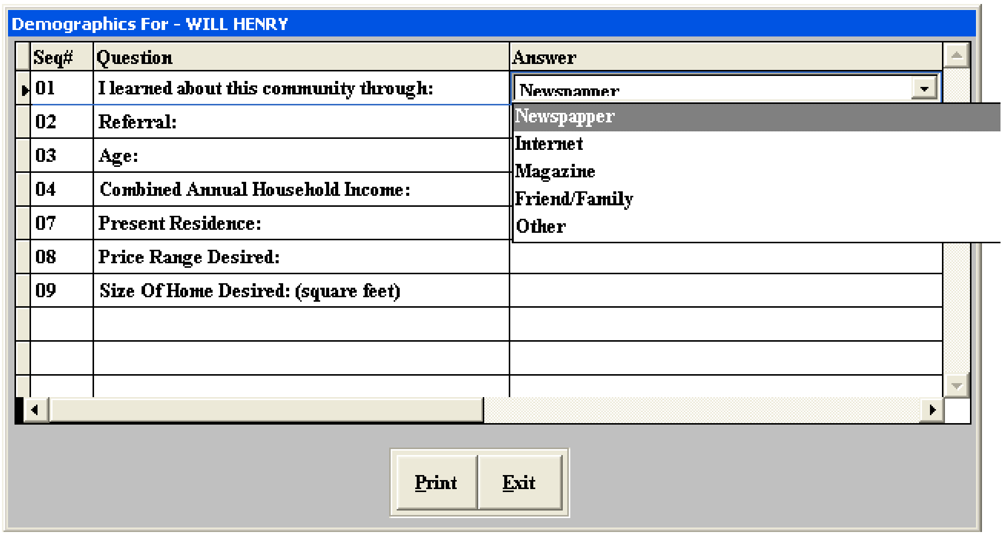
To Schedule Calls

If the call you are entering is to be scheduled, then enter a date in the ***Date To Call*** column. This will trigger a popup window similar to the automated letters to let you know that you have calls to be made. For details on processing scheduled calls please refer to page 37)

If you just made a call that you wish to log then once you have entered all the details pertaining to it, you must check the ***Call Complete*** column. Doing so will automatically update the ***Date Called*** field with today's date and your log entry is complete. The date can be overridden if need be. The **Delete** button will delete the selected call/item and the **Print** button will allow you to print the call history for this buyer.

Entering Demographic Information for a Prospect

When selecting the **Demographics** button a screen will open displaying the demographic questions that have been set-up for this project. (See page 11)



To enter the prospects responses to your questionnaire, simply go to the ***Answer*** field and either type the response given by the prospect, or select it from the dropdown menu from the multiple choice responses (if applicable).

If a multiple choice menu item requires additional information then you can type the additional response directly after the selected item.

Print allows you to print the questions and answers for this prospect.

Moving a Prospect to another Phase

In the event that an existing prospect begins prospecting another phase (or project), you can simply change the designated phase by using the drop down list at the top left of the screen. Doing so will copy all of this prospects details to this new phase.

The ***Visit Date*** will then change to today's date on this new project, as the prospect is now viewing a new property, and the original visit date will reflect when this prospect was first entered into *IBSWIN*. These dates can be manually changed.

Note: Changing the phase is a copy function and therefore creates a duplicate record under each phase which can be changed independently as required. You must use the delete a prospect function to delete any invalid or old records. (see Delete a Prospect on page 26 for details)

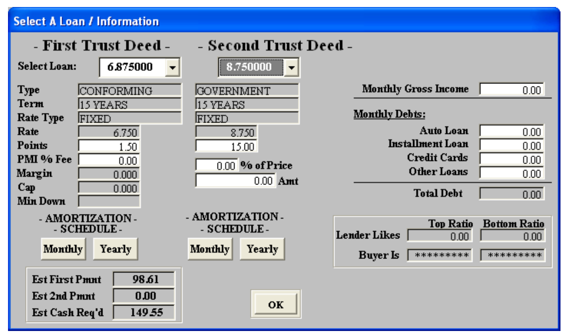
Qualifying a Prospect

If the project setup was done completely, then most of the fees and costs associated with buying the selected lot should already appear in the qualifying section of the prospect screen. If not, then you can modify most of the fields as required.

In the first column, begin by entering a ***Down*** payment amount (by either a percentage or total dollar figure) and the ***1st*** or ***2nd*** ***Loan Amount*** (if desired). This will serve as a beginning point for qualifying the prospect.

Now select the type of loan using the **Select Loans** button. This opens the screen pictured right. Here you can select either a ***First*** and/or ***Second Trust Deed*** and enter your prospects current financial liabilities. By selecting the **Monthly** or **Yearly** button you can also print or view the Amortization schedule for each loan.

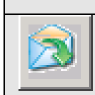
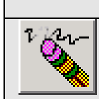
> **Note:** As any of the variables in this or the prospect screen are changed the relevant totals will also be recalculated and can be saved for this prospect.



Once everything is entered as completely as possible from the main prospect screen you be able to better access this prospects situation accurately, and give them an idea of their potential financial liabilities before making a purchase.

In addition to printing the Amortization Schedule (monthly or yearly) for the selected loan (from the **Select Loan** screen), you can also generate a ***Prospect*** (mortgage) ***Worksheet*** from the main **Print** button that will provide the prospect take home estimate.

Function buttons for the Prospect Screen defined

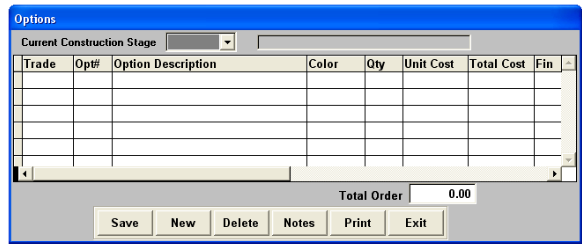
	This is the **Notes** button located to the right of where you enter the prospect name. This button allows you enter unlimited notes for a prospect. **Note:** If your prospect turns into a ***Buyer*** these notes will be saved and carried over to the buyer section.
	This is the **E-mail** button and is located on two areas of the screen. The first, next to the email field for the prospect and the other next to the broker agent drop down. If an email address exists for the prospect or the selected broker, then clicking on the button will open your default mail program along with a new email, and insert the e-mail address for you automatically. Then you can type and send your e-mail like normal.
	This is the **Delete** prospect button. Using this will permanently delete the prospect and all their information. You will be prompted to confirm deletion, but use with caution.

Add New

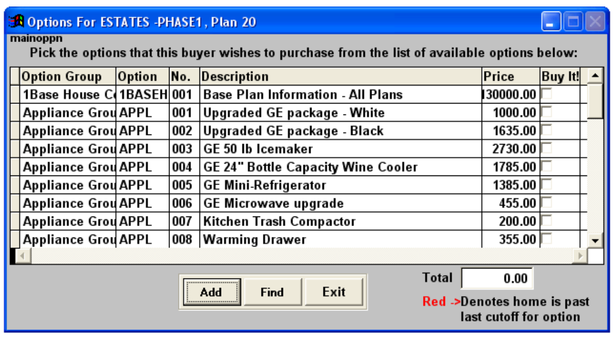
Use this button to add multiple prospects on the fly without having to exit this screen.

Options

This button opens a complete options ordering system that will allow you to select options for this prospect as long as you have permission to do so and you have the ***Options Plus*** module.



The buttons on this screen are self explanatory. Select **New** to begin selecting the options or upgrades to be ordered. **Print** allows you to print a ***Buyer Options Contract*** for the current order.



When ordering options, select the items to be included by checking the ***Buy It!*** check box and then **Add** them to the order. The **Find** button gives you easy access to jump to a particular group of options without having to look for them.

As you select items, the ***Total*** of the order will calculate on the bottom right. Orders displayed in **Red** are past the construction cut-off stage. You will be warned before being able to **Add** these items to the order. You have choice of keeping the options ordered when the Prospect buys the home or just as an Estimate. See Company Config -- Options.

For in depth detail on ordering options, please refer to the ***Options Plus User Guide***.

Buy

Select this button if you want to convert the prospect to a buyer. All prospect information, including any notes, options ordered, etc… will transfer over to the buyer record that is created and this prospect entry will be removed from the prospect system.

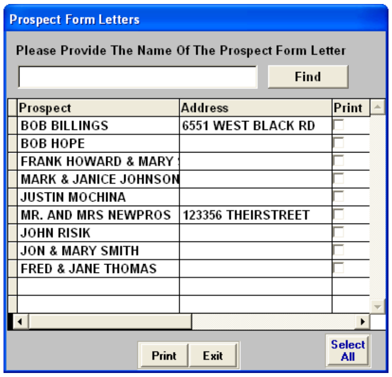
Letter Trak

Displays a list of letters that have previously been sent to this prospect including any due to be sent in the future using the automated letters system.

Print

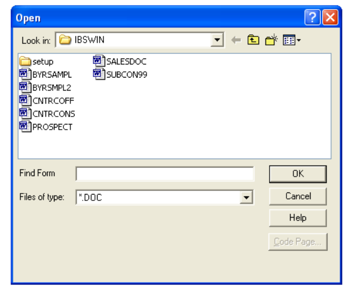
Gives offers you 5 prospect and loan reports to choose from: **Prospect by Phase –** list of all prospects in a particular phase; **Prospect by Project –** list of all prospects in a particular project; a **Prospect Worksheet –** to print a mortgage worksheet for the Prospect which will show the Phase/Tract/Lot that was selected along with the loan information, closing costs, and monthly payment information. **Prospect Letter –** to print a merge document; and **Prospect Note –** which prints any notes entered for this prospect.

Prospect Letters



Company created merge letter templates can be setup using ***Microsoft Word*** which will automatically insert custom information from the *IBSWIN* database. To create a merge document please contact a Pharaoh consultant for assistance.

Some samples are provided and can be found in the main IBSWIN folder. When selecting this option you will be prompted to select a phase and designate a visit date range from which a list of prospects will be created. The following screen will appear.



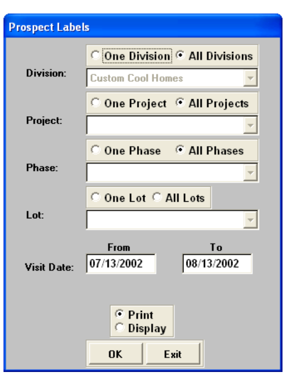
Start by finding your desired letter using the **Find** button. A window will open by default to the IBSWIN directory. If this folder does *not* contain your letter then you will need to browse to the directory where you have saved it.

Once you have found your file, select it and click on **OK.** You will then be returned to the main prospect list. Now using the ***Print*** checkbox column you can select the prospects that you would like send your desired letter to. You can also use the **Select All** button to select all prospects.

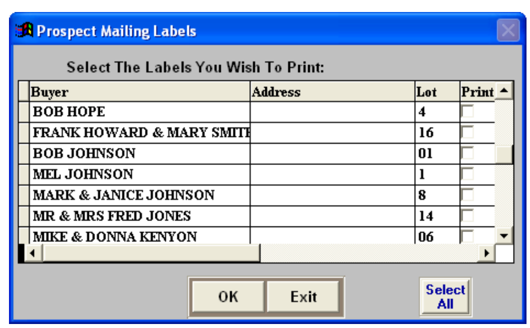
The **Print** button will automatically open ***Microsoft Word*** and create a personalized letter for each of the prospects that were selected. Before printing you can scan through the letters and edit them individually if required. When you are ready to print the letters print them like any normal Word document.

Note: The template for each letter must remain unchanged and generic although it can also be edited separately. If edits were made to the individual letters they will ***not*** affect the template and will not be saved. To save a letter, use the ***Save As*** function in the ***File*** menu of ***Word*** and give it a name. The customized letters can only be saved one at a time.

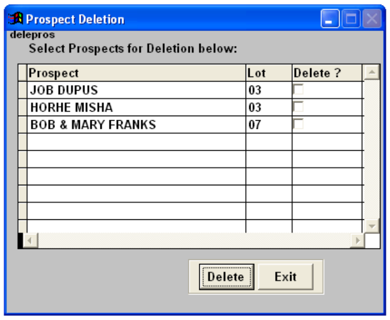
Once printed, return to the main ***Form Letter*** screen. If there are no other phases that letters are to be printed for you may **Exit** the screen.



Prospect Mailing Labels



This menu item allows you to print mailing labels according to your selection criteria. Initially you will be able to narrow down your desired prospects by ***Division***, ***Project***, ***Phase***, and ***Lot*** and then finally by ***Visit Date***. Then, like in the ***Prospect Letters***, you will be able the check which prospects you would like to print labels for or ***Select All*** of them.

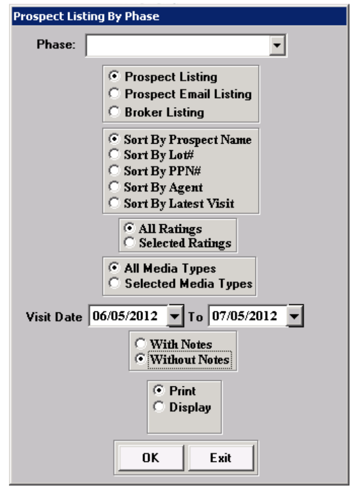


Delete a Prospect

If there is no need to retain a prospects information then click on this selection. You will be asked to select the phase in which the prospect is listed. Select the phase and the ***Delete Prospect Screen*** will appear.

To delete, check the relevant prospect/s by clicking on the appropriate check box in the ***Delete*** column. Then select the **Delete** button to finalize the deletions.

Prospect Listings (Reports)

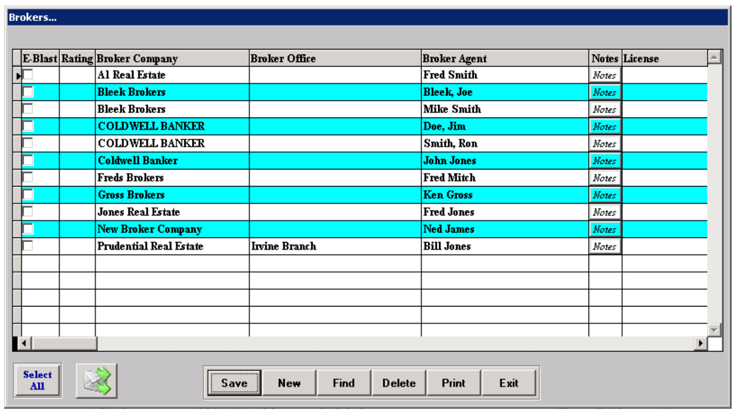


Under the prospect menu you will be able to print a variety of prospect listing reports by phase or by project or even a list of deleted prospects.

There are many selections and/or sort criteria available including sort by: ***Prospect Name***, ***Lot #, PPN#, Sales Agent, Latest Visit Date, Selected Ratings*** (based on your rating system), ***Media Types***, with or without ***Notes***, all within a range of desired visit dates.

There also is a **Prospect Email Listing** and **Broker Listing** report that can be run from this selection.

Add Brokers



This screen gives Sales Agents easy access to be able to add and manage any brokers that they are working with on any given project.

It also allows them to send e-mails to them using the ***E-Blast*** column and then selecting the e-mail button with the green arrows. This will open their default mail program and automatically add the email addresses to a new blank email.

eBlast

As the name suggests this screen allow you to be able to send e-mails to your prospects in bulk. Each of the options in this menu allow you to filter a list of prospects whom you can e-mail individually or bulk by checking off the ***E-Blast*** column or ***Selecting All***. Check your Internet Service Provider for Email limits.

Then use the email button with the green arrows. This will open your default mail program and automatically add the email addresses to a new blank email that you can edit and send.

Buyers

The image to the left displays the main options available under the ***Buyers*** menu. Most of these are essentially the same as for ***Prospects***.

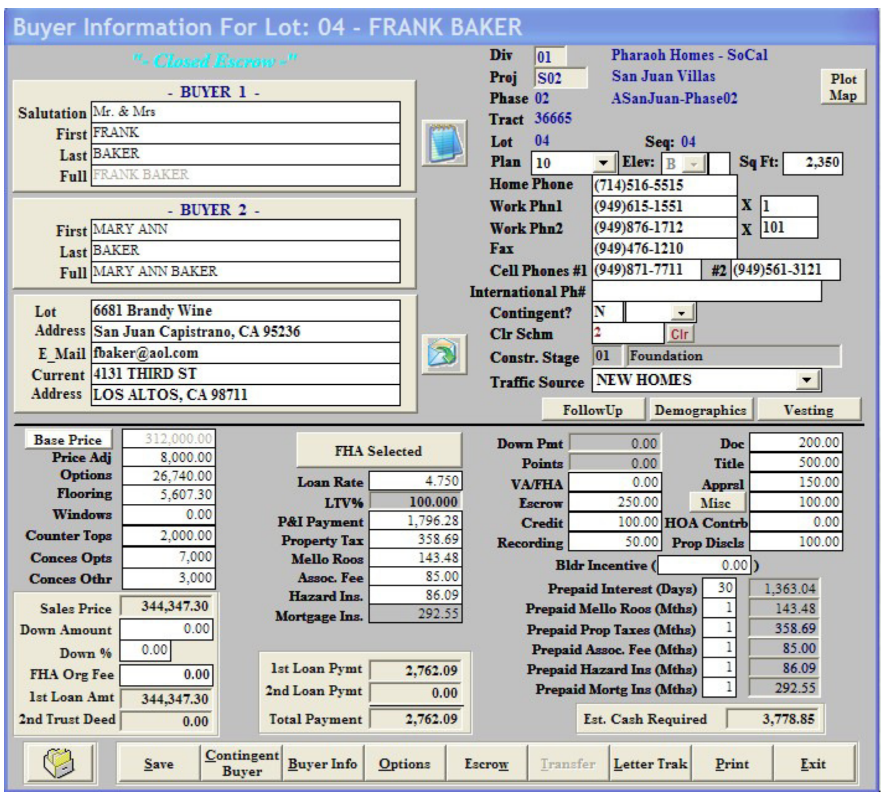
The main difference between a prospect and a buyer screens is the detail that is attached to the buyer record once a prospect has been elevated to buyer status.

Any information that was gathered during the prospect phase *is* retained in the ***Buyer*** record.

After finding a specific buyer, or entering a new buyer (if bypassing the prospecting process), the screen to the left will be displayed.

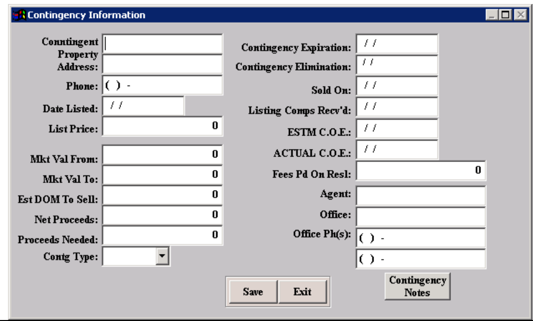
You will have the opportunity to add Buyer 1 and Buyer 2 information. Whilst almost all the fields are the same as for the ***Prospect Screen***, you will now have a different set buttons at the bottom.

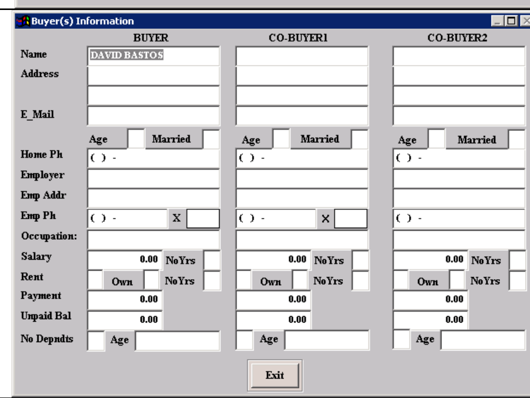
These will allow you to track the buyer through the sales process. Each button is described on the next page.



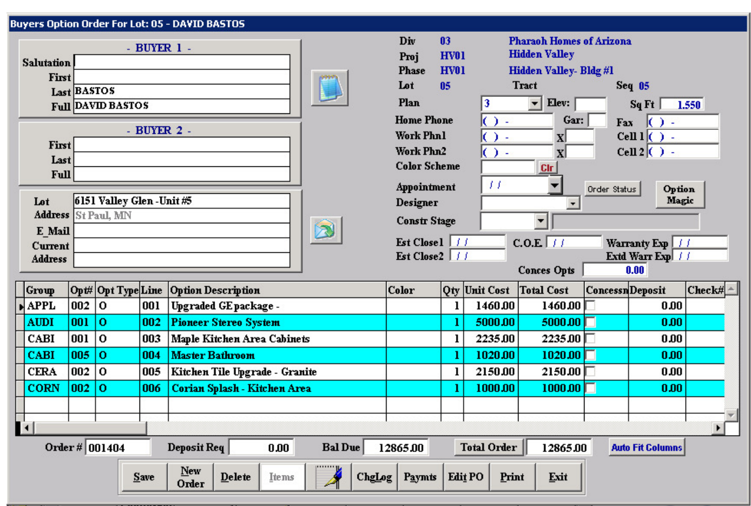
Function buttons for the Buyer Screen defined

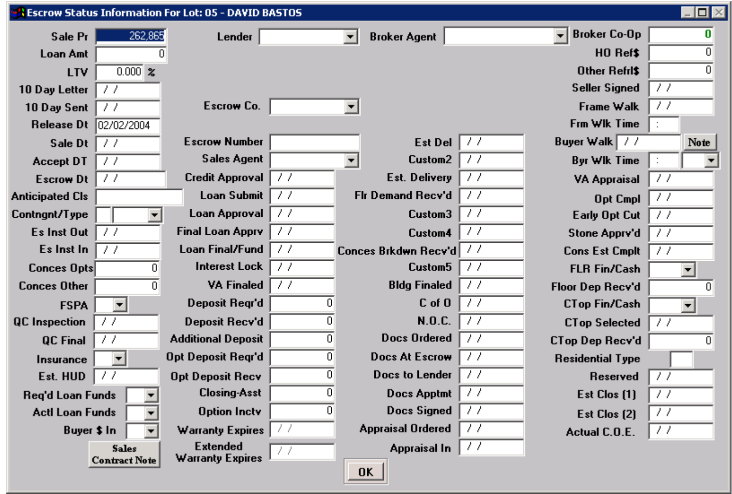
<table>
<tr><td></td><td>This button allows you to assign and graphics or lot images or PDF document to this lost record for easy access. Double clicking on any item attached will open the file in its respective default program.</td></tr>
<tr><td>Save</td><td>Use this button to save any changes that you have made in the Buyer screen.</td></tr>
<tr><td>Contingent Buyer</td><td>This screen provides a way to track contingent sales information, some of which will print on the applicable reports.


</td></tr>
<tr><td>Buyer Info</td><td>Using this button allows you to enter additional information for up to three buyers.

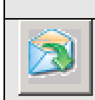

</td></tr>
<tr><td>Options</td><td>Depending on the user permissions, this button will either allow the Sales Agent to view the Options already selected and ordered or they can make the selections with the Buyer.

Unlike the prospect options ordering screen, which is a basic version of this screen, which is what is used in the Option Plus module. For details about how to use this screen and all the functions available, please refer to the Option Plus User Guide.


</td></tr>
</table>

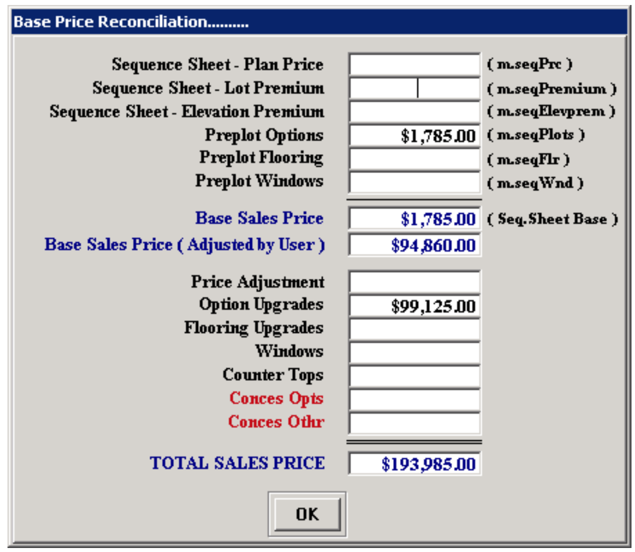
Escrow	This allows you to enter or view the ***Escrow Status Information*** for the buyer. Some of the fields in this screen can be customized in to suite your tracking purposes. See page 16 for details. Please refer to Appendix 2 on page 43 for a description of each field. 
Transfer	Allows you to transfer a Buyer along with all their personal information to another lot/phase if they choose not to buy the current lot. If options have been ordered, the system will allow you, depending on your permissions, to either delete the options or change them to pre-plots depending on the install status.
Letter Trak	Displays a list of letters that have either been sent previously, or are scheduled to be sent in the future using merge letters. If any unsent letters appear here you can print and send them from this screen.
Print	Use this button to print a ***Buyer Purchase Agreement*** - a document outlining the purchase fees and costs that can be added to your sales contract; ***Buyer Merge Documents*** - to generate your sales merge documents or contracts; ***Color Sheet*** - specifying the color scheme of the house; ***Mortgage Worksheet*** - outlining the payments and fees associated with the loan; ***Closing Summary*** - basic form for outlining the sales prices for escrow; and ***Broker Commission Summary*** - calculated based on broker commissions set-up in the sequence sheet.
Exit	To return to the main menu.

Other Buttons found on the buyer screen

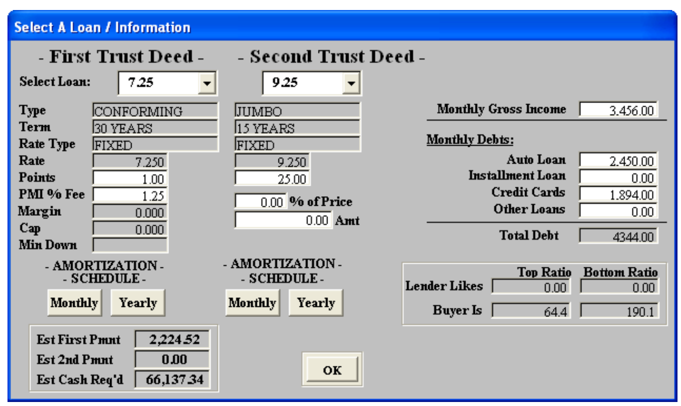
	This is the **Notes** button located to the right of buyer 1 name fields. This button allows you enter unlimited notes for a buyer. The notes are carried over from prospects if this buyer was previously entered as a prospect and then converted to a buyer. There are no limits to the length of notes that can be added here.
	This is the **E-mail** button and is located to the right of the email field for the buyer. If an email address exists, then clicking on the button will open your default mail program, along with a new email, and insert the e-mail address for you automatically. Then you can type and send your e-mail like normal.

<table>
<tr>
<td>Demographics</td>
<td>Allows you to enter the responses to your demographic questionnaire that has been setup for this project (See page 11). For details on how to answer the questions please go to page 22 in the prospect section for more information. Print allows you to print the questions and answers for this prospect.</td>
</tr>
<tr>
<td>FollowUp</td>
<td>This button allows you to keep a historical record of the phone calls made to this buyer and even schedule them. (Please refer to Tracking and Scheduling Phone calls on pg. 37)</td>
</tr>
<tr>
<td>Base Price</td>
<td>This button opens a window that provides you with detailed breakdown of how the total sales price is calculated.

It gives you the figures as set-up in the sequence sheet and also from the other modules as applicable. This a read only screen. No new entries can be made or adjustments to existing fields.

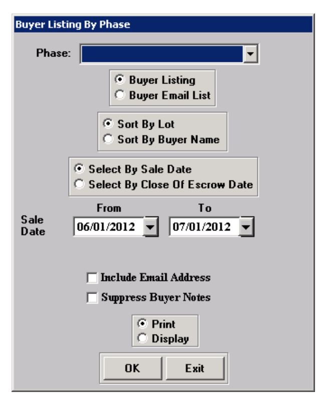

</td>
</tr>
<tr>
<td>Select Loan</td>
<td>This button is the same as in the prospect screen. It allows you to select the 1st and/or 2nd loan program and also allows you to enter the buyer's income and monthly liabilities to check against the loan requirements.

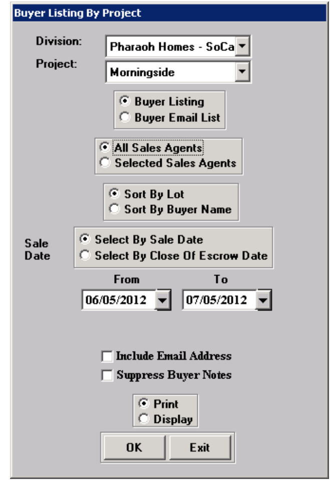
You also have the option of viewing and printing a monthly or yearly Amortization schedule.


</td>
</tr>
</table>

Buyers Letters & Mailing Labels

These menu items under the main **Sales: Buyers** menu are similar to the ones under the Prospect menu and are explained in detail on page 25 of *this* user guide. The only difference between the two is when selecting the range of dates (from which to select the people to mail to) that in the ***Buyers*** section the date is the ***Sales Date*** as opposed to the ***Visit Date***.



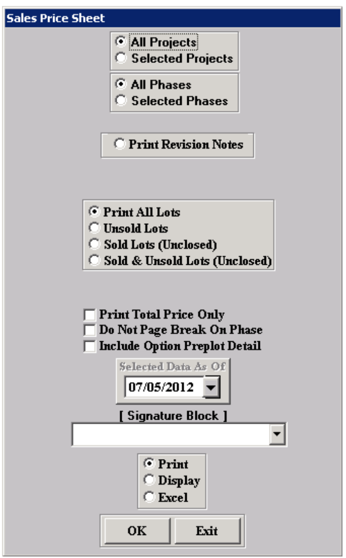


Buyer Listing (Reports)

Under the buyer menu you will be able to print a variety of buyer listing reports by phase or by project.

There are many selections and/or sort criteria available including: ***Buyer Name***, ***Lot #, Sales Agent/s, Sale Date, Close of Escrow Date***, with or without ***Notes***, all within a range of desired sale dates.

There also is a **Buyer Email Listing** that can be run from this selection.



Sales Office Price Sheet (Report)

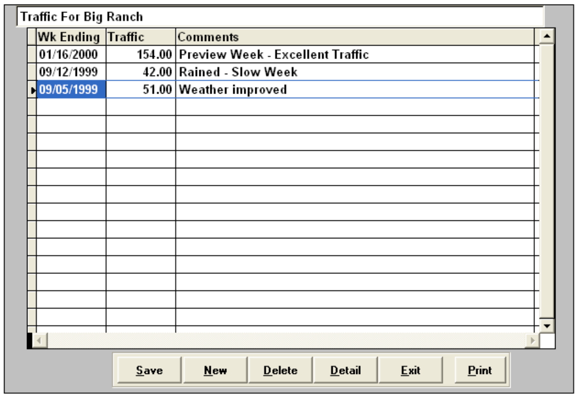
This report, found under the buyer menu, prints a comprehensive ***Sales Price Sheet*** report which allows you to track and generate a summary of the sales for any project or phase based on whether a lot is ***Sold***, ***Unsold***, ***Sold but not Closed***, etc. This report can also be exported as a spreadsheet and comes with other selections as pictured.

eBlast

Same as in Prospects, as the name suggests this screen allow you to be able to send e-mails to your Buyers in bulk. Each of the options in this menu allow you to filter a list of buyers whom you can e-mail individually or bulk by checking off the ***E-Blast*** column or ***Selecting All***.

Then using the email button with the green arrows it will open your default mail program and automatically add the email addresses to a new blank email that you can edit and send.

Traffic (Tracking and Detail Entry)



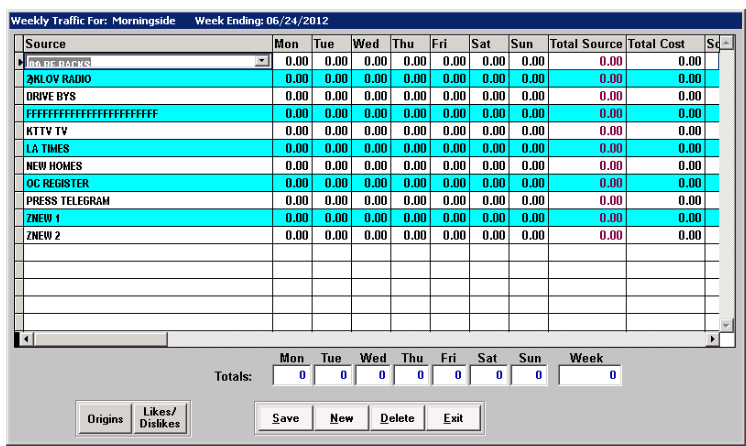
IBSWIN provides a simple way of recording weekly traffic for a project. When **Sales: Traffic** is selected from the main menu the following screen (left) will open.

Selecting **New** will create a new record for the current week ending date. This date can be overridden if you wish to create a record for another ***weekend ending*** date however the date entered must be a Sunday for consistent reporting.

The ***Traffic*** column is a weekly tally of the number of people/traffic that is a total that is calculated from the ***Traffic Detail*** screen. A description can also be entered for each weekending/line item

Please Note: The Weekly Traffic numbers entered here typically reflects the "raw" traffic through the sales center and not necessarily prospects that have been entered in the system. We do provide this quality Traffic information in the Media Reports (Page 37) that reflects the source and numbers of prospect records created.

The **Detail** button will open the screen pictured on the next page, where you will be able to define a list traffic sources applicable for your project from the predefined list already set-up earlier (see page 10).



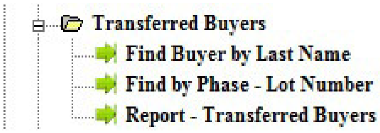
Each traffic source is broken down on a day to day basis for the selected week. Here you enter the number of prospects for each day to create a chart of where your traffic is coming from including other information such as ***Total*** (Marketing) ***Cost*** and any other ***Source Comments*** to notate any additional information that may have affected the numbers.

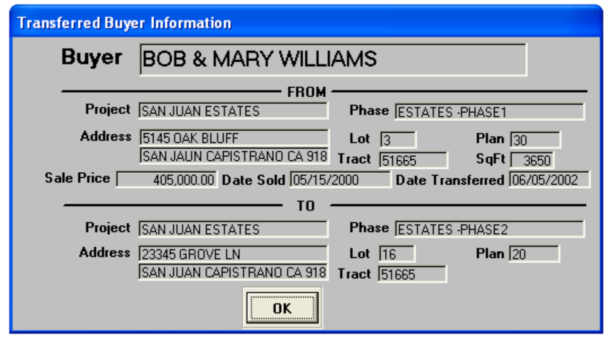
The **Origins** button allows you to select from a list of predefined origins as set-up in the sales system and to add those numbers to the detail screen as well giving you further information about your prospects. Likewise the **Likes/Dislikes** allows you to add the tally for what prospects like or disliked when viewing your community.

Note: When adding additional weeks to the main Traffic screen, the traffic sources included from the previous week ending (as per the ***Detail*** screen), will be duplicated to the most recent week ending date.

The **Print** button in the main screen allows you to print a ***Project Traffic Report*** and a ***Weekly Traffic Detail*** report within a specified date range which combines information from both screens. Other traffic related reports can be found under **Report: Sales Reports**.

Transferred Buyers





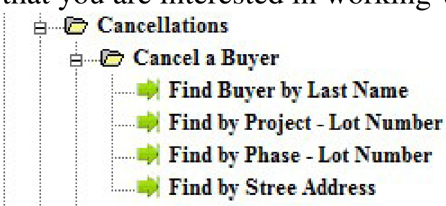
This menu allows you to view information on any buyers that transferred from purchasing one lot to another.

This option allows you the search by either last name or lot number. You can also print a report listing all transfers on a per project basis.

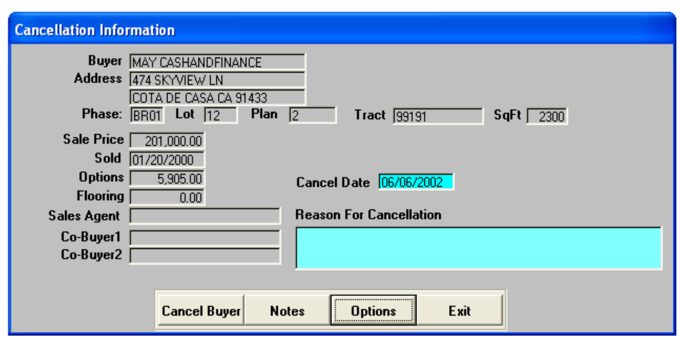
To transfer/copy a buyer to another phase/lot see page 29.

Cancellations

This option allows you to ***cancel*** existing buyers. For each cancellation a sales cancellation record is created. Most of the menu options provide a series of search methods to find a buyer or cancelled buyer that you are interested in working with.



Both the ***Cancel a Buyer*** (pictured) and ***Cancelled Buyers*** screens are the same except for the **Cancel Buyer** button which is replaced with a **Delete** button in the *Cancelled Buyers* screen.



The **Cancel Buyer** button cancels a buyer and the **Delete** button deletes the cancellation record permanently. In that case the buyer's records will be removed permanently with the option to convert the buyer to a prospect.

The ***Cancel Date*** can be changed if necessary and ***Reason for Cancellation*** field allows you to enter any notes necessary regarding the cancellation.

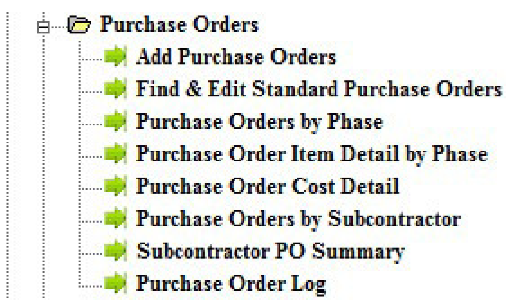
When a purchase is cancelled, the lot will be made available for sale once again. You will also have the choice to turn any options ordered into pre-plot options. Doing so will automatically update the base price of the lot. For options that are not desired as pre-plots, they can be deleted from the main option ordering screen (for that lot) like normal.

> **Note:** If you choose to delete all the options, <u>and this project is defined as a "non-spec" project</u>, you will be asked if you want to remove the plan also. This will return the lot to inventory and allow the selection of an alternative plan in prospect or buyer screens.

Both the ***Cancel a Buyer*** & ***Cancelled Buyers*** screens allow you to view any options ordered by that buyer. The Cancelled Buyers report can be printed by phase of by project and gives you the detail of the cancelled buyers.

Purchase Orders

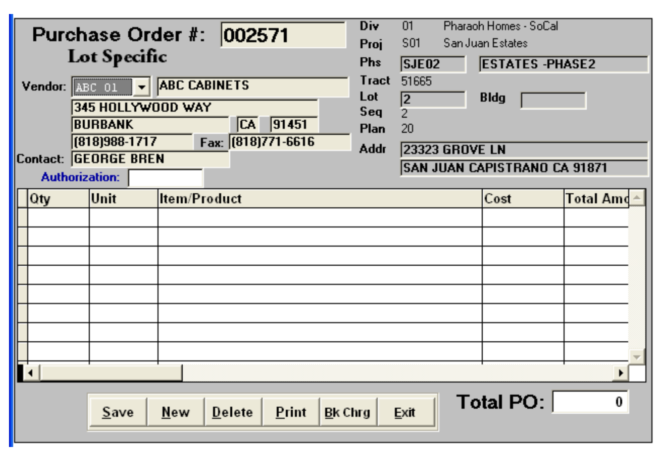
Below is an image depicting the menu system for the Purchasing Orders section of the Sales Module. Each menu item will be defined in the following sections.



Adding a Purchase Order

There are two categories of Purchase Orders that can be created. These are; ***Lot Specific*** – for PO's that relate to only *one* specific lot, and ***Non-Lot Specific*** – for PO's that relate to *all* lots in a particular phase.

Select **Sales: Purchase Orders: Add Purchase Orders** from the main menu. Once you have selected the phase and lot (if applicable) then the PO screen (right) will open.



> **Note:** Both the lot specific and non lot specific screens are identical.

1. To add an item to the P.O. it is best to start by selecting the **vendor** or subcontractor from the list. This is done using the drop down at the top left-hand corner of the screen.

   Then select **New** from the bottom of the screen to begin adding your PO line items for this particular vendor. You will notice that the ***Qty***, ***Cost***, and ***Total Amount*** columns will automatically fill with '0' value. Enter all the pertinent information for each specific item that you want to order through this vendor. Use the column chart below as a guide.

Purchase Order screen columns defined

Qty	The number of items you wish to order for that item.
Unit	The unit of measurement for the particular item.
Item Desc	A description of the item and/or product you are ordering.
Cost	The cost per unit of the line item.
Total Amount	This is calculated by multiplying the quantity of items purchased by the total cost per unit.
Notes	To add additional notes or information regarding the item. The field will be highlighted in red if any notes are entered and will print on the PO as part of the line ***Item Description***.
Cost Code	This is used to accurately assign this item to the appropriate category for exporting purposes to your back office accounting software (if applicable).

2. To print or display your PO select the **Print** button

3. A back charge is a credit purchase order. To backcharge an item select the **Bk Chrg** button. A window similar to the main PO screen will open. Follow the same procedures to add items and/or products to a backcharge as outlined in section 1 on the previous page.

4. To save new PO's or back charges select **Save**. To erase a particular item, select it, and press the **Delete** button. **Exit** will close the PO screen and will always prompt you to save any changes. Select **Yes** to save and exit or select **No** to exit without saving.

Miscellaneous PO Menu Items

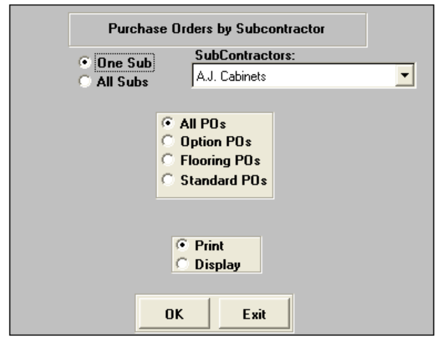
There are several menu items found under the **Sales: Purchase Order** menu (see screen image on the top of page 34) which are briefly described below.

1. **Find a Sales Purchase Order:** Allows you to find your desired purchase order by PO number or to view a list of all PO's from all phases and projects.

2. **Report - PO's by Phase:** Print or display a ***Purchase Order Summary Report*** listing and totaling the cost of each lot or non-lot specific purchase order per phase.

3. **Report - PO Cost Detail:** This selection prints (or displays) a report showing purchase orders sorted by the subcontractor trade code or category (cost code).

4. **Report - PO's by Subcontractor:** Print a selection of purchase orders sorted by either one or all subcontractors. The various PO options can be seen at the right.



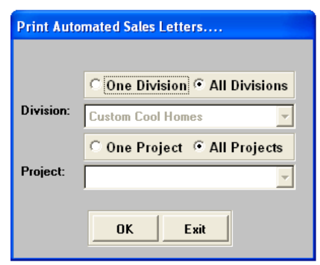
Processing Automated Letters

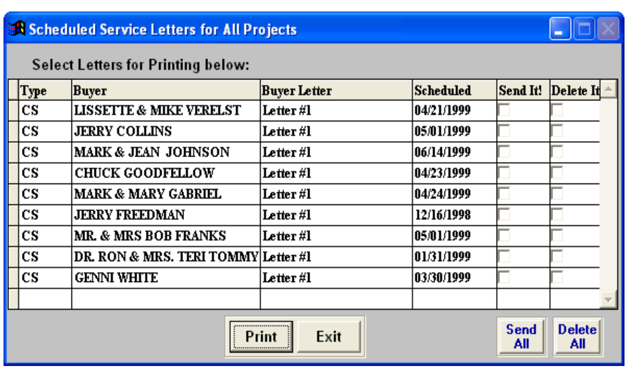
There are two ways of processing Automated Letters from within ***Sales Manager Plus***.

When you login, the system will notify you if there are any letters due to be mailed via a small popup window. This popup will display any of the three relevant categories of automated letters that can actually have letters set-up to be sent. These three categories are Warranty (Customer Service), Prospect, and Buyers. Using the associated check box you will be able to select which of the displayed categories you wish to process letters for. If you do not wish to process any at this time then you can ignore the notice.

Note: The notice/reminder will continue to popup each time you login to the system. Any letters you do not wish to send can be deleted. See below for further details.

The second way to process your automated letters is once you are already in the system by going directly to the **Sales: Automated Letters** menu. After selecting the type of letter you wish to process the window (pictured right) will open asking you to specify which projects/divisions you wish to process letters for.





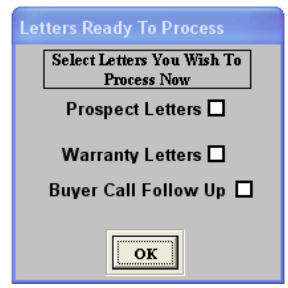
A list of applicable names will then appear. From here you will be able to select which letters you wish to send by checking the **Send It!** checkbox for each person. The **Delete It!** checkbox allows you to delete the scheduled letter if you decide that this buyer/prospect does not require it.

The **Send All** and **Delete All** buttons to the bottom right are self-explanatory. Leaving the **Send It!** or **Delete It!** check boxes blank will allow you to process the letter at another time. The **Print** button processes your selected choices.

If any letters have been selected to send, then Microsoft Word will open, and your merge letters will be automatically generated. These can be edited individually if required before printing them from Word.

Note: Automated letters can only be processed if there are letters that have reached there scheduled send date. To process them before the send date you would need to do it individually from the buyer or prospect screens using the ***Letter Track*** button.

Processing Scheduled Calls



Similar to the automated letters function, there are two ways of processing scheduled phone calls. One is going directly to **Sales: Scheduled Calls,** or when you login to the system you will be notified via a pop-up if there are any phone calls due to made.

When you choose to process any scheduled calls, the system will generate a call worksheet which lists all the calls that are due to be made. This worksheet includes who to call, their contact details, and the extended dialog information that you entered.

As each call is completed, you will need to go into the buyer record and check the ***Call Complete*** field so that you are not prompted to make the same call each time you logon. For more info see page 21.

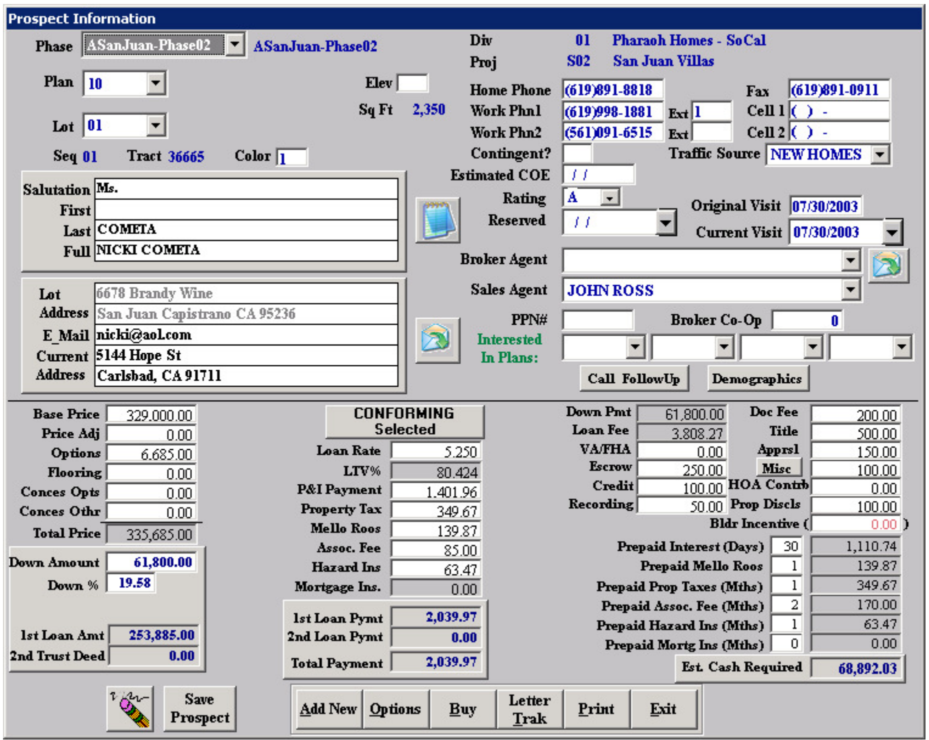
Media Reports

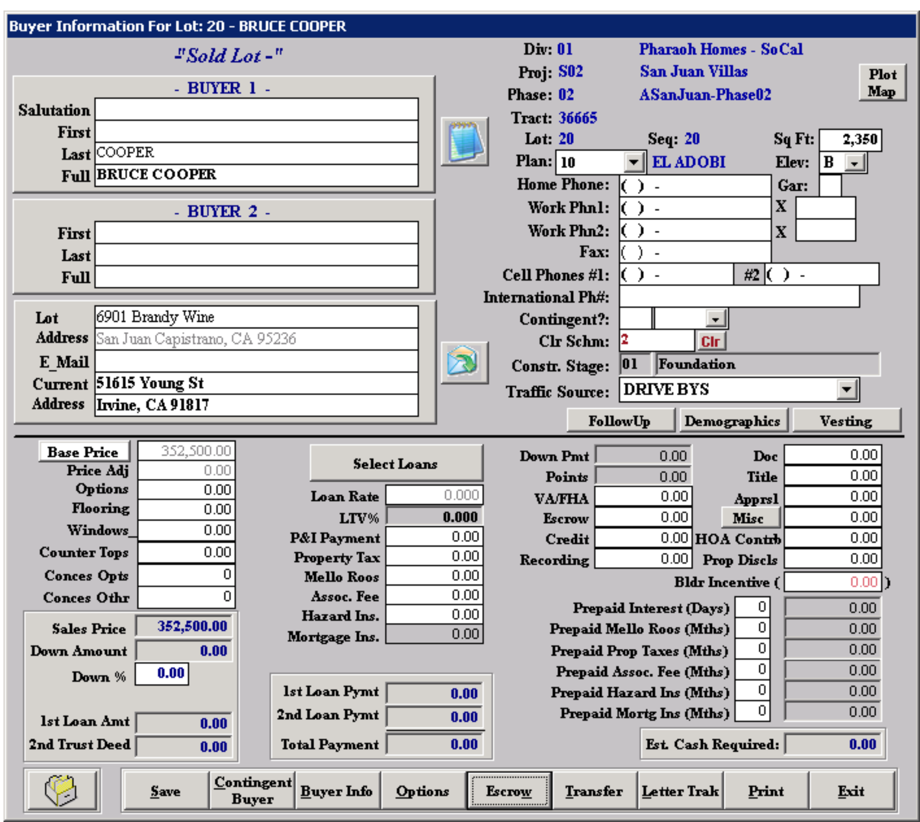
This menu gives you access to two main media analysis and tracking reports that each come with many filters and options to print the information you need. These reports provide detailed quality prospect sources based on the actual prospect records entered.

Access Project Completion Document

This allows the Sales Agents to access any document added/assigned to the project (see page 14). When this option is selected, it will display any documents assigned and by double clicking on the document you wish to view it will open automatically.

APPENDIX 1 - Prospecting/Buyer Screen Fields Defined





The top portion of each screen shows the **Prospect** or **Buyer Information** depending on which screen you are in. Below is a description of the information presented in the screens above. Most of the fields are the same in both screen and are noted where variances occur.

Phase, Div, **Proj, Seq**, **Tract**, **Sq Ft** describe specific details pertinent to the lot which you will be prospecting.

Plan is a dropdown menu giving you a selection of plans available to be built on the selected lot.

Color displays the color scheme for the house (if it is setup). In the buyer screen you can add or view more detail than in the prospect screen

Lot is a dropdown menu showing you a list of the released lots for the selected phase and plan from which you can prospect a potential buyer.

Salutation, First, Last, Full Name is for the prospects name some of which will print on most reports and letters where the prospects name appears. Please make sure that the appears here as you would like it to appear in all correspondence.

Buyer 2 *(buyer only)* allows you to enter a second buyer

Lot Address is automatically filled in when the Plan and Lot are selected. This field is read-only and cannot be changed on this screen.

E-Mail address for the primary prospect. Having this information can be an efficient means of contact when face-to-face or phone contact is not possible.

Current Address is the prospects current home address. This address will be used on all correspondence that will be sent to the prospect.

Home Phone, Fax, Cell 1, Cell 2, International Ph# *(buyer only),* is the current telephone contact numbers.

Work Phn1, Work Phn2, Ext. is the work telephone numbers and extensions if applicable.

Contingent enter **Y**es or **N**o. In addition, in the buyer screen you can also select the type of contingency from the dropdown.

Traffic Source provides a drop down list of sources for how prospects heard about this project. If more sources are desired see page 10.

Rating *(prospect only)* allows you to enter a rating for the prospects readiness to purchase. An example would be: **A** – Non-contingent, ready to purchase within 2 weeks, **B** – Plans to purchase within 30 days, **C** – Plan to purchase within 90 days, **D** – Plan to purchase 90 days or later, **F** – Interested in future phase, **U** – Not rated – cannot qualify, **B** – Broker, and **R** - Reserved.

Reserved *(prospect only)* is the reservation date that is added when a prospect is given an **R** rating please see page 20 for details

Original Visit *(prospect only)* is the date the prospect first visited the Project.

Current Visit *(prospect only)* is the date the prospect most recently visited this lot.

Broker *(prospect only - for buyer it is in the escrow screen)* is a drop down to assign the broker who is working with the prospect.

Sales Agent *(prospect only - for buyer it is in the escrow screen)* is a drop down to assign the sales agent working with this prospect.

PPN# *(prospect only)* is basically a prospect code or number that is used on some custom reports to track certain types of prospects

Broker Co-Op *(prospect only - for buyer it is in the escrow screen)* is where the brokers co-op fee can be entered

Constr. Stage *(buyer only)* shows the stage of construction for the purchased home

Interested in Plans allows you to assign any other plan types that the prospect maybe interested in

The second half of the screen is split into three sections: Pricing information, Loan/Financing information, and Fees and Costs. These provide all the pertinent sales and buying information for the selected lot/home.

Pricing information

Base Price is pre-determined and is filled in based upon the ***Plan*** and ***Lot*** selection. The base price includes ***Base + Lot Premium + Pre-plotted Options***. This is a read-only field.

Price Adj. can be a positive or negative amount. If a lot were to be discounted, the amount would be entered in this field.

Options & **Flooring** show the total amount for the buyer options or flooring selected. The total is brought in from the Options screen. The flooring amount comes from our Design Studio module.

Conces Opts. is a concession amount for options ordered. Because of this the sale price will be reduced by the amount entered in this field.

Conces Othrs. is a concession amount that will also be deducted from the sale price.

Total Price is automatically calculated based on the figures entered above and is a read-only. The total amount is the ***Sale Price*** on the contract.

Down Amount and **Down %** is the down payment and can be entered as either a dollar amount or percentage. If a dollar amount is entered the percentage will reflect the percentage of the total price that the entered dollar amount represents. If a percentage is entered, the dollar amount will reflect the percentage amount.

Loan Amount equals the ***Total Price*** minus ***Down*** payment. It is a calculated field.

Loan/Financing information (Monthly)

Loan provides you with a list of loan rates and terms from a drop-down list. See page 8 to change or edit a loan program.

P&I Payment is based and calculated on the ***Loan Amount*** and the selected ***Loan***.

Property Tax is filled in based on the Tax % x Sale Price / 12 (months). This field is read-only.

Mello Roos or SID/LID is entered if applicable on a per month basis.

Association Fee is for the monthly portion of the Association fee.

Hazard Insurance is for the monthly portion of the Hazard Insurance.

Mortgage Insurance is to be entered if the Loan Amount is less than 80% of the sale price. This is to be the monthly amount.

Estimated Monthly Payment is the total derived from the figures entered in this column. It is automatically calculated and is read-only.

(One time) Fees and Costs

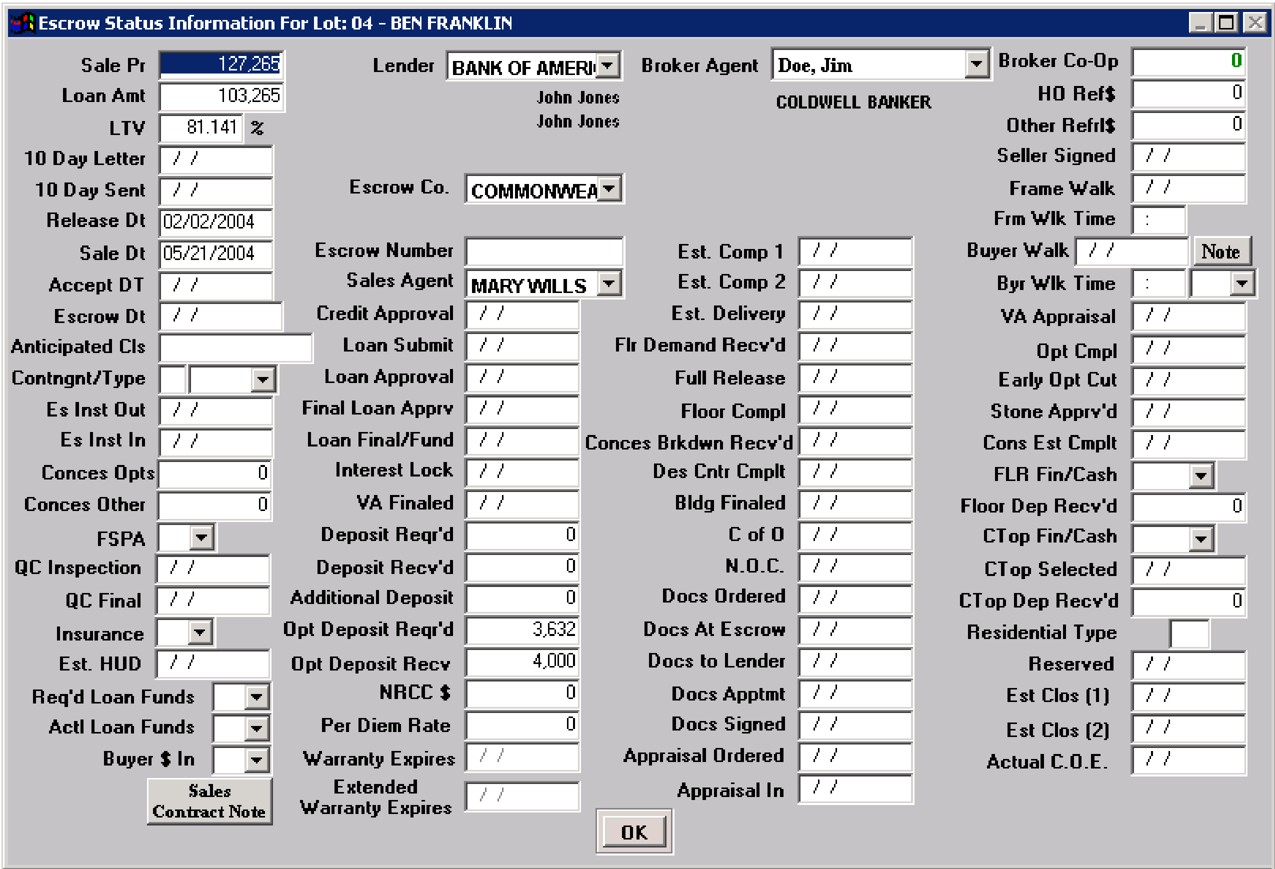
Down Payment is redisplayed from the down payment amount on the left of this screen.

Loan Fee is automatically calculated when the Loan program is selected. This is a view-only field. Enter **Doc Fee**, **Escrow**, **Title**, **Appraisal**, **Credit**, and **Miscellaneous fees**. The program assumes 30 days for the **Pre-paid Insurance**, **Prepaid Mello Roos**, **Prepaid Association Fee** estimates, however you do need to enter the number of **Prepaid Interest (Days)**.

Estimated Cash Required is the sum of the **Down** payment, the ***Fees and Costs*** and the ***Prepaids***.

Please Note: the buttons at the bottom of this screen are described on page 24 for prospects and page 28 for buyers.

APPENDIX 2 – Escrow Screen Defined



This screen allows you to record and enter in any additional escrow information that you would like to keep on a buyer. Most of the information that can be stored here is purely optional and does not inhibit the functionality of ***Sales Manager Plus***.

Pricing and Sales Information (left column)

Sale Pr ***(Sale Price)*****, Loan Amount,** and **LTV** ***(Loan to Value)*** fields are carried over from the *main buyer screen.*

10 Day Letter is for the date when the letter should be sent.

10 Day Sent is for the actual date when the 10-day letter was sent.

Sale Date is the date when the prospect was turned into a buyer. If the buyer was not originally entered as a prospect then the sale date must be entered here. This date can be edited, but care should be taken when doing so.

Accpt Date is the date when the contract is accepted.

Escrow Date is the date when the escrow was opened on the lot.

Anticipated Cls is a notes field about the escrow closing

Contingency is a (**Y**)es/(**N**)o field which is carried over from the *main buyer screen* along with the dropdown for contingency type.

Es Inst Out is the date when the papers are sent to Escrow.

Es Inst In is the date that you receive the papers back from Escrow.

Conces Opts comes from the buyer screen and is the amount of any concession options

Conces Other comes from the buyer screen or can be entered here. It is for any other concession amounts provided.

QC Inspection and **QC Final** are for the quality control and inspection dates

Insurance basic Yes/No dropdown

Loan/Financing information (middle columns)

Lender allows you to select the lender from a drop-down list of items created under the main Setup menu or can be typed in directly here.

Escrow Co provides a drop-down list of escrow companies or type one in.

Sales Agent is for the Sales Agent name. A new name can be entered here on the fly however to enter any additional contact details you must go to **Setup: Sales Agent**.

Credit Approvl, Loan Submit, Loan Approval, Final Loan Apprv, Loan Final/Fund, Interest Lock, VA Finished are all date fields which are specific to the buyers' loan.

Deposit Required, Deposit Received, Additional Deposit, Opt Deposit Reqd, & **Opt Deposit Recv** are fields related to deposits or options deposits. The Options fields are filled in automatically from the options screen.

NRCC$ is the amount of non-recurring closing costs.

Per diem Rate is the rate charged per diem if the house does not close on time.

Warranty Expires and **Extended Warranty** are both dates related to the home warranty and ties to the ***Customer Service Plus*** module

Est. Comp 1, Est. Comp 2, and **Est. Delivery**, are provided to enter the estimated construction completion date.

Full Release is the full release/opening date of the house.

Flr Demand Recv'd and **Floor Compl** are related to flooring construction and when it will be finished.

Des Cntr Cmplt is a date for completion with the Design Center.

Bldg Finaled is when the building permits have all been approved.

C Of O is the date of Certification of Occupancy

N.O.C. is the date for the Notice of Completion

Docs Ordered, **Docs At Escrow**, **Docs to Lender**, **Docs Apptmt**, **Docs Signed**, **Appraisal Ordered**, **Appraisal In** are all dates related to document signing

Completion & Finalization information (last column)

Broker Agent. is a dropdown list of broker companies which can be setup under **Setup: Brokers**.

Broker Co-Op is the broker fee amount.

Seller Signed is when the seller signed the documents

Frame Walk & Time is for the framing inspection date and time

Buyer Walk & Time is for when the buyer walked the property including a notes button for additional information

VA Appraisal for a veterans loan

Opt Cmpl date for when options are completed

Early Opt Cut is for early options cut-off date

Stone Apprv'd is for countertops

Cons Est Cmplt is the estimated construction completion date

FLR Fin/Cash is a dropdown to select if the flooring is financed or paid by cash

Floor Dep Recv'd is for any flooring deposit amounts

CTop Fin/Cash is a dropdown to select if the countertop is financed or paid by cash

CTop Dep Recv'd is for any countertop deposit amounts

Residential Type is a user entry field to put a code for the type of residence, e.g. is a House, Unit, or Condo

Reserved is the reservation date if applicable, please see 20 for more information

Walk Thru is the date of the final walk thru and inspection.

Est. Close 1 & **2** are the estimated close of escrow dates.

Actual C.O.E. is where you would input the actual close of escrow date.