sales BUILDER

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Introduction

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What is SQLSalesBuilder?

SQLSalesBuilder is the industry-standard sales presentation application for homebuilders. It is designed as a sales presentation tool for sales agents, a means to prepare and print purchase agreements and related documents, a communications tool between sales offices and corporate offices, and a means to enhance the overall home buying and sales office experience.

SQLSalesBuilder accomplishes these tasks by automating and optimizing many of the tasks that were previously either time consuming or difficult to accomplish such as:

- Keeping a up-to-date list of prospects and storing visitor information – such as lot, plan, loan, and option preferences -- between visits. This information can be brought up upon a visitor's return so you can continue where you left off.

- Keeping a current list of options, lots, and loan types; then sharing this information with the corporate office seamlessly – or the reverse in which the corporate office establishes and maintains the data and makes it immediately available to the sales offices.

- Generating automatically calculated move-in costs and monthly payments based on buyer selected factors such as loan type, desired down or monthly payment, etc. – and providing easy-to-read handouts for the prospects to take home and review.

- Generating printed and electronic reports for all aspects of the sales and marketing process. These reports range from weekly sales to prospect traffic, cancellations, competition, options, and many more. Reports can be printed for visitors for them to take home with them, for sales managers to base decisions upon, or for appraisers to provide comps.

- Preparing custom tailored contracts, eliminating the worry and hassle of hand printed contracts (note: custom contracts are developed in consultation with specific homebuilder needs and use; as such, they are custom designed and must be ordered separately).

- Utilizing a customer relationship management system providing organized and comprehensive prospect and buyer follow-up including scheduled letters, phone call reminders and emails. The follow-up can be generic in nature or customized down to an individual.

Who should use the User Guide?

This User Guide is designed for… you guessed it… sales agents. The User Guide will provide an overview of all of the tasks involved with day-to-day operation of **SQLSalesBuilder**. It does not explore many of the advanced set-up and configuration possibilities typically performed by CPS **Enterprise**. If you are a sales agent at a "stand-alone" sales office, you will need to make sure that you also have a copy of the **CPS Enterprise** User's Guide so that you can perform maintenance and set-up of your **SQLSalesBuilder** data using SalesBuilder Maintenance (part of **CPS Enterprise**).

The only thing you need to have in order to follow the Users Guide instructions is a basic knowledge of the Microsoft Windows operating system. If you are already familiar with tasks such as clicking, double-clicking, and dragging, you should not have any difficulty using the User's Guide. If this is your first time in front of a computer, you may want to have a knowledgeable colleague or friend sit down with you as you follow along.

How SQLSalesBuilder organizes data

SQLSalesBuilder stores and understands data just the way it is used in the real world. It contains **lists**, also called **table**s, of information that represent the following:

- Lots
- Plans
- Options
- Visitors and Buyers
- Loans

Conventions Used

Some of the terms you will see in this User Guide are standard computer or real estate terms. There are also a few new terms that are specific to **CPS Enterprise** and **SQLSalesBuilder**.

- **Click**: Depress and release left mouse button.
- **Double-Click**: Depress and release left mouse button twice rapidly.
- **Screen**: Page or window of application.
- **Select:** Click down the mouse and drag over an area of text. Release mouse when finished.
- **Resize:** Move the mouse cursor to the edge or corner of a window. Click and drag until window is desired size. Release mouse when finished.

Chapter

2

Getting Started

Before you can sit down with your prospective buyers and create presentations for them, you will need to do a bit of work to get your computer ready to run **SQLSalesBuilder**. If your company has opted for installation services, a qualified CPS Technician will complete most setup for you.

Installation

System Requirements

For **SQLSalesBuilder** to run on your computer properly, it must meet the following minimum system requirements:

- 733MHz Pentium III;
- 256MB RAM;
- 500 MB free hard drive space;
- Microsoft Windows 98 (second edition), 2000, or XP;
- Display resolution of 800 X 600 or better;
- pcAnywhere version 10.5 (or higher) or Windows XP and an Internet connection required for interactive technical support.

Installing CPS Enterprise

1.) Place **SQLSalesBuilder** CD-ROM into your drive

2.) Browse the CD-ROM drive:

  a. Open **My Computer.**

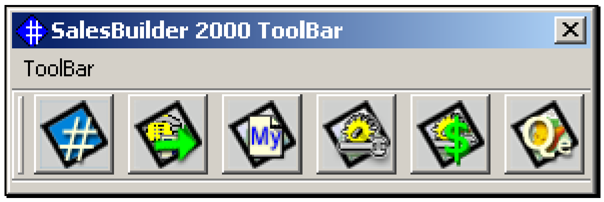
  b. Double-click on the **CD-ROM** drive icon

3.) Double click the **setup.exe** icon

4.) Follow through each step of the installer.

SQL Toolbar

When finished, **SQLSalesBuilder** will be located in your Start Menu, under **CPS Enterprise** with the **SQL Toolbar** available to startup. Typically, the **SQL Toolbar** will install on your desktop. The number and type of icons may be been previously determined by your corporate/division office and may not include all displayed below.



Initial Setup

Because **SQLSalesBuilder** is designed as a presentation and sales tool, it doesn't contain standard functions to set up or modify configuration options (for items such as sales office name, community fees, impounds, etc.). Typically, all setup and configuration must be done with **SQLSalesBuilder Maintenance** (which is part of **CPS Enterprise**).

However, we have provided a "quick" setup capability if your corporate/division office has not established basic parameters for your community – or if your builder has authorized sales agents to maintain some basic data. If you are a stand alone sales office, with no connectivity to a corporate office, you must have **CPS Enterprise** installed on your computer so that you can add and modify plans, lots, options, etc. as well as establish configuration options. Please, see the **CPS Enterprise** User Guide for more information about setup using **SQLSalesBuilder Maintenance.** "Quick" startup will be discussed later in this chapter.

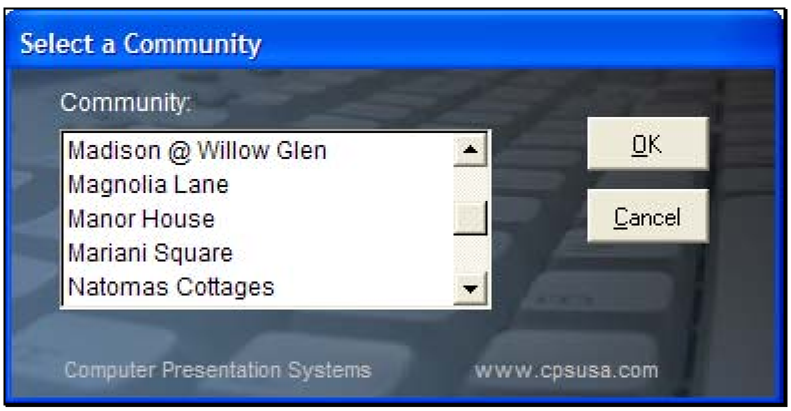
Logging on

Let's start **SQLSalesBuilder** for the first time. Click on the **SQLSalesBuilder** icon displayed on the **Toolbar.** Of course, before you can start **SQLSalesBuilder**, you must have established your SQL connection (via either an Internet connection or your corporate WAN/VPN connection). Please, consult your CPS rep if you you're not sure how your SQL connection is provided.

User Name and Password

Initially, you are prompted for your **User Name** and **Password.** These key items should have been given to you by either your sales manager, another person from your corporate office, or a CPS Representative. Enter them now:

Your **Name** and **Password** have been assigned specific capabilities including community access. You may be assigned to only one community or you may be cross selling and need access rights to more than one community. If you have multiple community access, select the community you wish to work on by highlighting it and pressing **OK**:

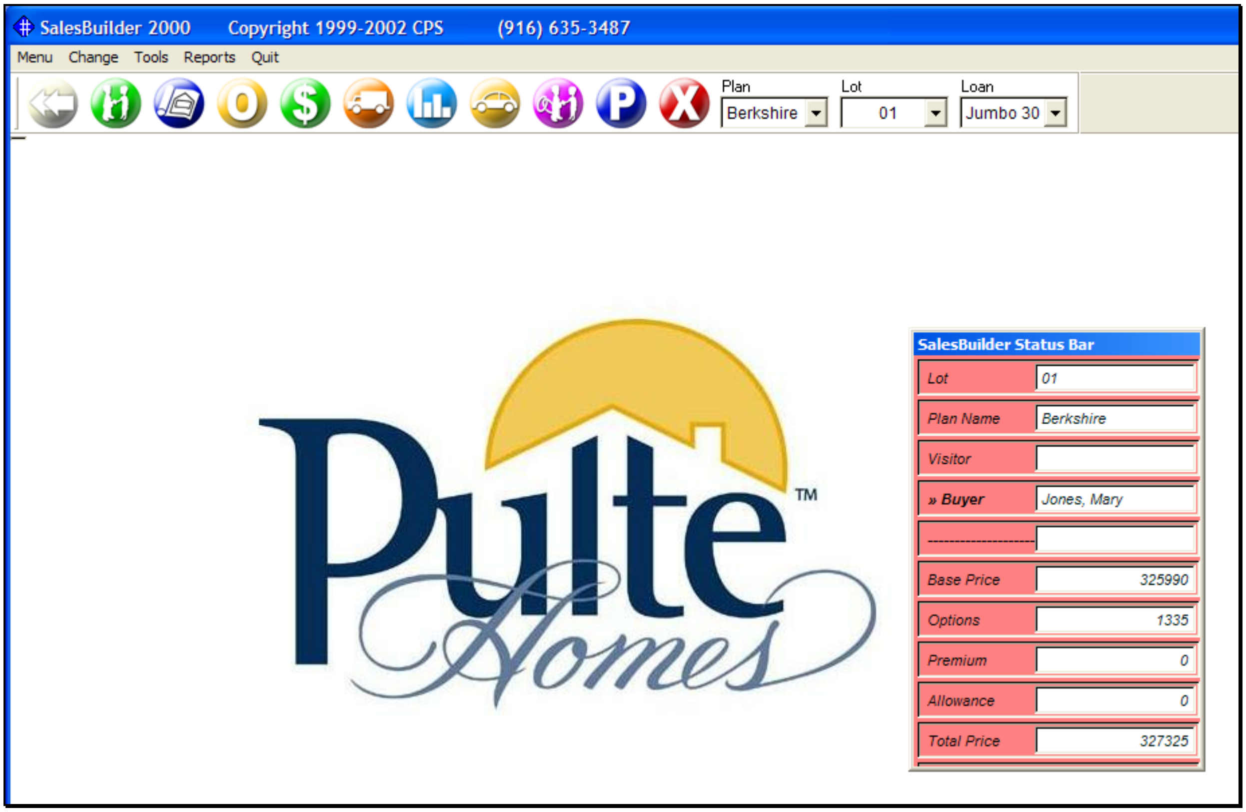


Main Window

Once you are logged in, the **SQLSalesBuilder Main Window** is displayed (the sample below contains a builder logo – consult your CPS rep for information regarding logo's, pictures, etc.). In addition, you are able to pre-set the colors, fonts, etc. through **CPS Enterprise**. Your actual screen may contain different "button" pictures, as well. CPS has a variety of "button" styles and your builder may have developed specific styles. Regardless of the "button" style, the functionality remains the same.

Tool Tips

Note: **SQLSalesBuilder** provides "**tool tips**" so that you may determine a button's function by locating your mouse arrow over the button. The function (e.g., "Loans" or "Traffic") will display.



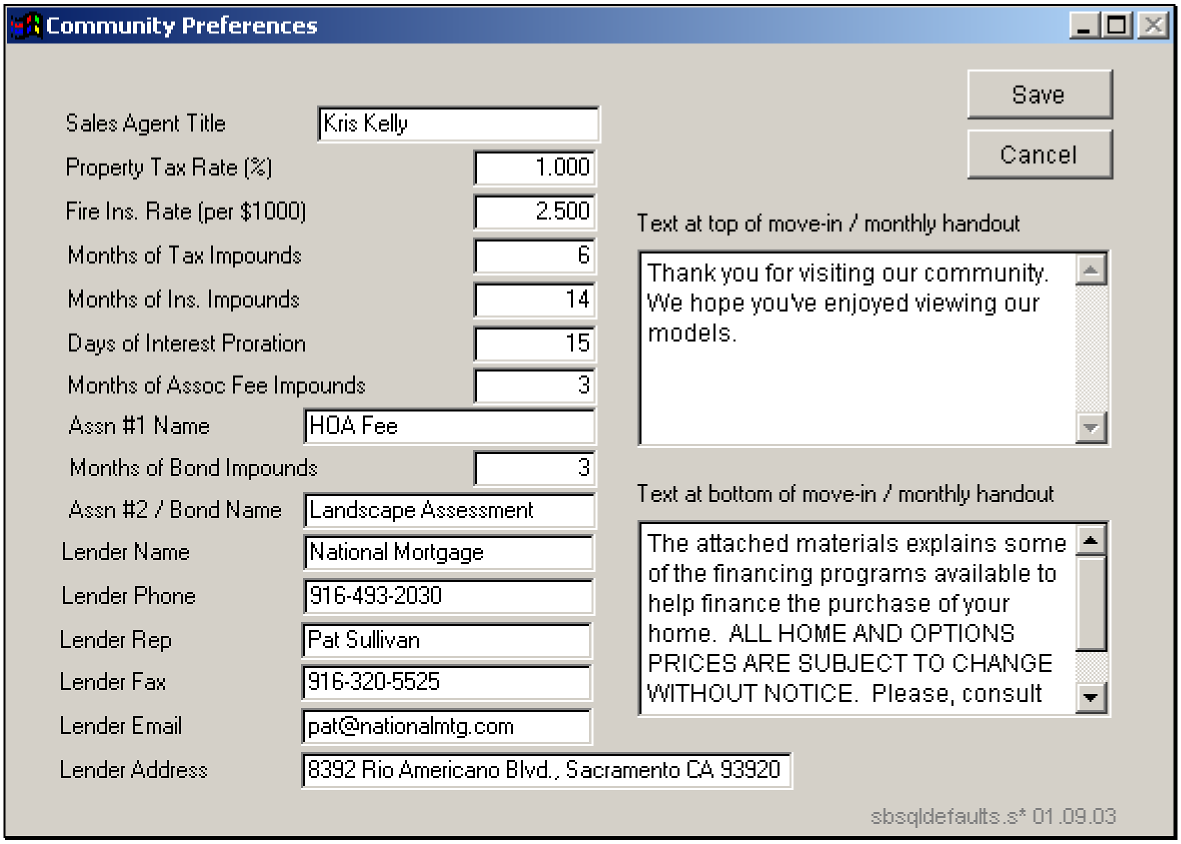
Generally, your **SQLSalesBuilder** screen will have been setup to look similar to the one pictured (above). However, you may wish to adjust your window and toolbar positions to meet your needs and/or monitor display capabilities. Typically, we recommend setting your monitor display to 1024 x 768; however, 800 x600 will work, as well.

If any window seems too small or in the wrong place, simply move or resize it. To resize windows, move your mouse to the corner or edge of the window until your mouse cursor turns into a double-headed arrow. Click and hold the mouse button then move the mouse until the window is the desired size. To move a window, move your mouse cursor to the title bar (the top bar of a window containing the window title), click and hold the mouse button and move the mouse until the window is in the desired position.

Quick Start

We've found there are times when the corporate/division office doesn't have sufficient information and/or time to setup everything necessary to prepare sales presentations and/or sales agreement packages. To facilitate immediate **SQLSalesBuilder** use, we've added the **Quick Start** capability. To use **Quick Start**, go to the Main Window's **Toolbar** and press:

Once selected, **Quick Start** displays the following information screen:



The **Community Preferences** information can be established at *either* the sales or corporate/division office. It provides the basic parameters (property tax rate, impounds, homeowners association dues, etc.) needed as a part of the move-in and monthly cost calculations -- for *your* community. You may customize it with preferred lender information and disclaimers for the handouts provided to prospective buyers. Please, review the information and make adjustments as necessary. Once you've made all necessary changes, press 

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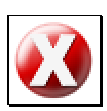
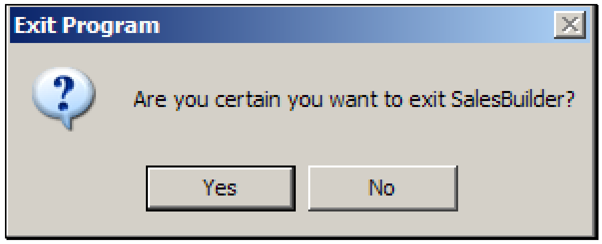
Logging Off

Exit SalesBuilder

End your **SQLSalesBuilde**r use by clicking the Exit button:

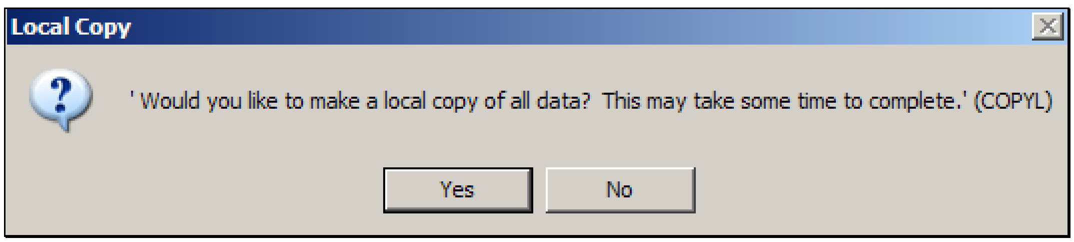


Then,



Making a Backup Data Copy

Because **SQLSalesBuilder** has the capability of running offline (without an Internet connection), you are asked whether you'd like to make a backup copy of your data to be used in case the Internet is not available. We suggest making a backup at least once a week (and, if your Internet connection is off/on, you may wish to make a daily backup).



You're now ready to get started with your first presentation. Continue to the next chapter, **Sales Presentation**, to find out how to accomplish this.

Chapter

3

The Sales Presentation

Finally, **SQLSalesBuilder** is installed on your computer and you're ready to use it for the first time … but wait! You still need to know how!

This chapter steps you through the basics of what we call the **Sales Presentation** – that is, the process of developing the information you'd like to provide a prospective buyer. If you feel lost or confused, don't panic. Just have patience, and try again. As with many things, most of your **SQLSalesBuilder** learning and confidence will come from practice and "on the job" experience.

About Scenarios and Sales

Sales Presentation use involves several pieces of information: the **Visitor**, the desired **Lot** and **Plan**, selected **Options/Upgrades** and a **Loan** program. You're able to mix and match any number of these items in an attempt to create a **Scenario** that matches your **Visitor** needs. **Scenarios** "tentatively" represent what a **Sale** would be like if it were approved by your **Visitor**.

Scenarios (and Sales) contain the following information:

- One **Visitor** (or more accurately, one person record, which may contain a potential buyer plus co-buyer, as well)
- One **Lot**
- One **Plan**
- One or more selected **Options/Upgrades**
- One **Loan** program
- **Down Payment Amount, Closing Costs, Other Costs**, etc.

This means that to form a complete **Scenario** (in anticipation of a sale) you – working with your **Visitor** -- will need to select this information before the **Scenario** is complete. <u>This chapter concentrates on the factors needed to create **Scenarios and Sales – prospect input, Lot/Plan/Option/Loan** selection.</u>

Some of the **Scenario** information --such as impounds, homeowners dues, etc. -- is automatically calculated based on factors set up by either the corporate/division office or you (through **Quick Start**). **Loan** program (rates, PMI, etc.) information is established through **Loan Maintenance**. All the information is combined to create the **Scenario** and, if accepted, **Sale**.

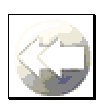
Status Bar

A summary of the selected information for the current **Scenario** is visible within the **Status Bar** on the right side of the **SQLSalesBuilder Main Window**. The **Status Bar** is color-coded so that you're quickly able to determine whether you're working with a prospect or buyer record (the colors are established in **CPS Enterprise**). Typically, buyers are identified as red; prospects as blue but...your office will setup the color-coding with their own color scheme.

Information cannot be entered directly into the **Status Bar;** rather, it *displays* information as a result of selections made in other parts of **SQLSalesBuilder**, such as the **Select a Lot**, **Select Options**, etc. screens.

Starting a new Scenario

Sometimes it's useful to think of the **SQLSalesBuilder Main Window** as you do your desk -- before moving from one prospect or buyer file to another, it is always a good idea to clean up and file away any information left from the prior person. You're able to accomplish this activity between prospects and buyers by "clearing the scenario". To clear the scenario, click the following button on the **SQLSalesBuilder Toolbar**:



Getting Started

This User's Guide will step you through the basic components of a **Sales Presentation.** Once you become familiar with the screens, you'll develop your own **SQLSalesBuilder** style and you may or may not use the screens in the same pattern – and may find yourself skipping a few, as well! However, we want to guide you through all of the screens in a logical process so that you become familiar with what's available in **SQLSalesBuilder**.

ToolBar

Generally, you're able to work your way through a **Sales Presentation** by moving from left to right on the **SQLSalesBuilder Toolbar** (the drop down windows on the far right display selections previously made):

Visitors and Buyers

SQLSalesBuilder categorizes people visiting your sales office as either visitors or buyers (co-op realtors exist, too, but they fall into a separate category).

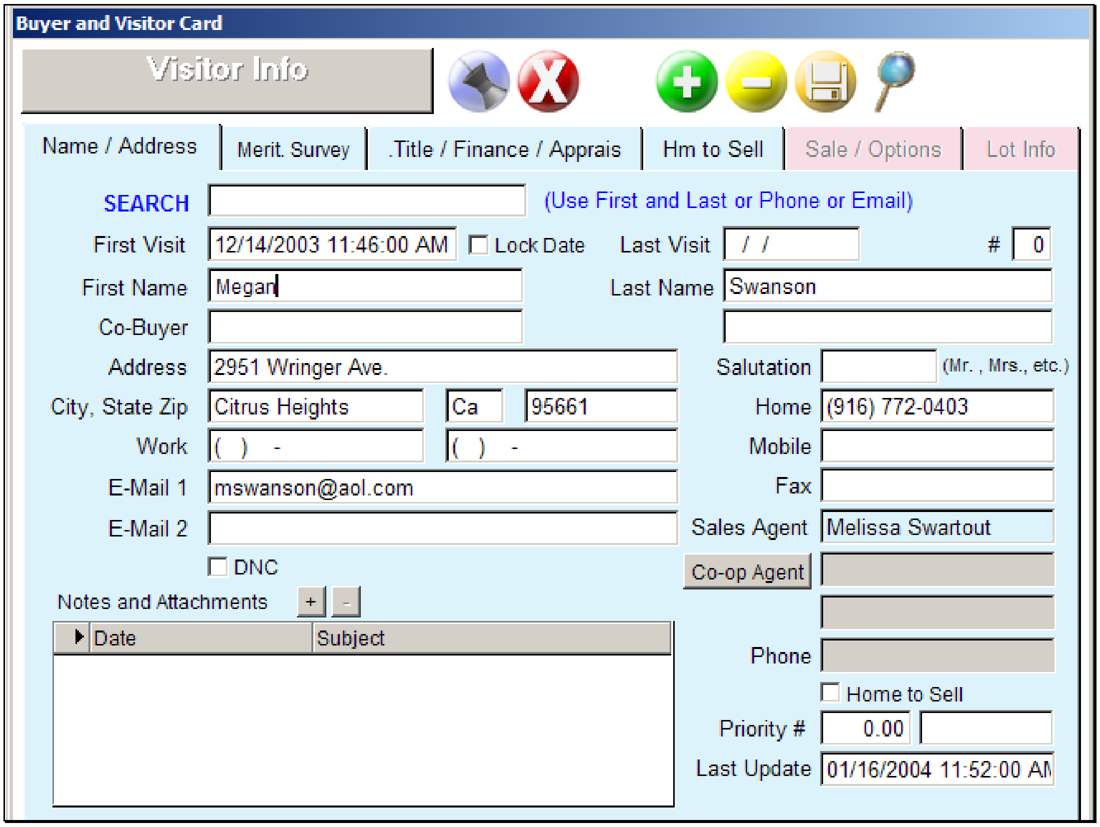
Everyone starts out as a Visitor. When a **Visitor** purchases a home, he/she becomes a **Buyer**. Note: when this User's Guide refers to a single **Buyer** or **Visitor**, it may mean multiple people (a **Buyer** and co-buyer, for example) who are stored together in the same **Visitor** or **Buyer** 'record'.

Generally, the first step in scenario creation is adding information about your prospect (visitor). To do this, click on the **Visitor/Buyer** button:

Visitor Information Card

Name/Address Essentials

Once selected, the **Visitor Info** screen is displayed. It is made up of several parts – our first priority is the **Name/Address** tab:



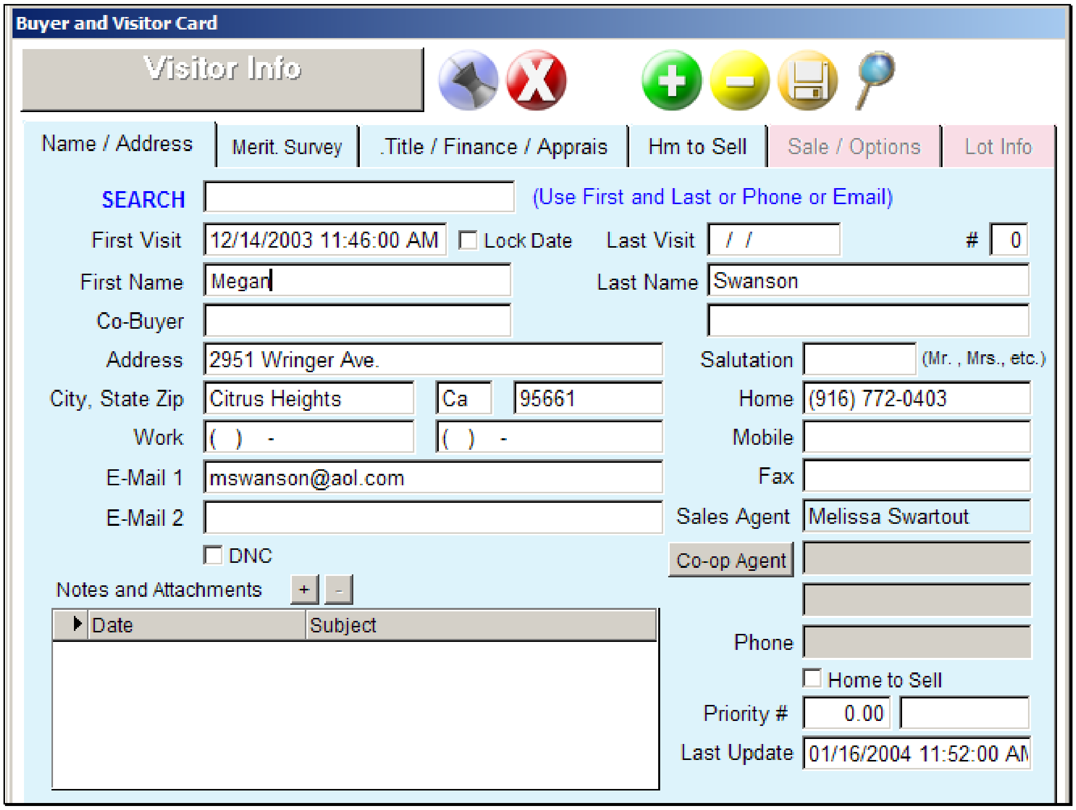
Notice: upon opening, **SQLSalesBuilder** displays the "active" **Visitor/Buyer** record.

To **Add** a new visitor, click the following button:

A new, blank card opens for you to begin entering information. There are 3 **Visitor** -specific Tabs.

Name/Address

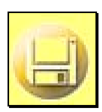
Type your **Visitor's** first and last name (as well as the a second (or "co") **Visitor** first and last name, if applicable). Press either the **ENTER** or **TAB** key on your keyboard to move from item to item. If you have or wish to enter more information, continue pressing the **ENTER** or **TAB** key or clicking your mouse into the desired field to enter it. Only the name is required, but the more information you have about your **Visitor**, the more accurate your marketing effort can be later on. **SQLSalesBuilder** automatically fills in the **Visits 1st** date; you may modify this date, if necessary (some offices are so busy over the weekend, for example, that they input cards during the week – the date is changed for accurate **Traffic** reporting).



Most of the input fields are relatively self-explanatory. However, there are several features you may wish to take advantage of to maximize your input efforts; they will be discussed in detail in the section labeled **Advanced Prospect Input**.

Saving Visitor Input

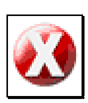
Once you've entered all **Visitor** data, you must **Save** the information by pressing the button:



This process saves your new visitor, and automatically loads this prospect into the current **Scenario**. Note: the prospect name now appears in the **Status Bar** under the visitor field.

Leaving the Visitor Card

To exit this process (with or without saving):

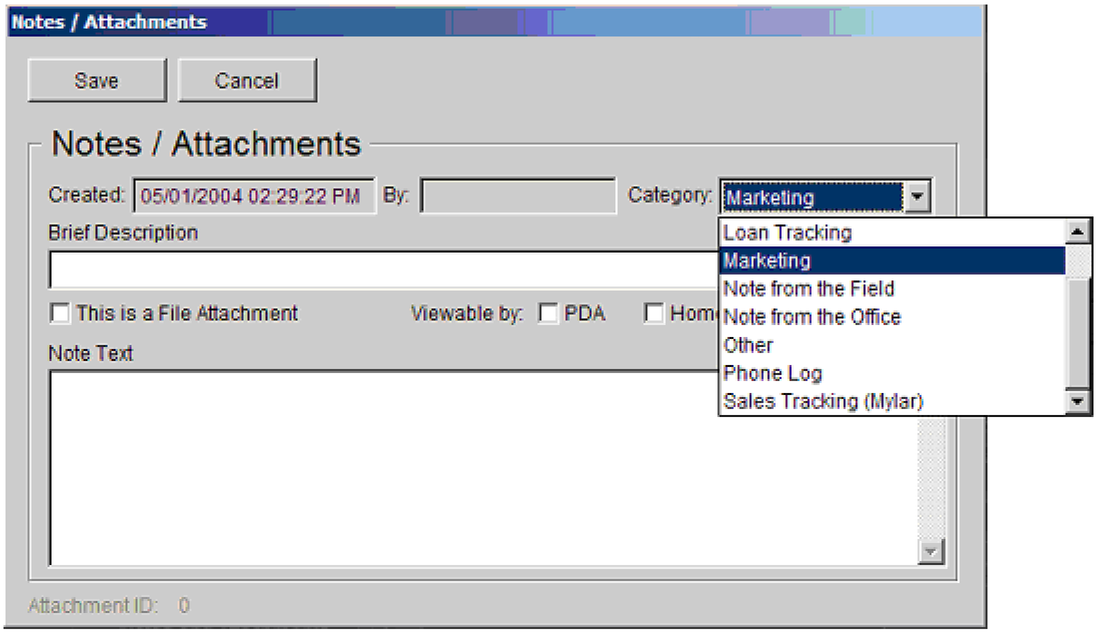


Advanced Visitor Card Input

SQLSalesBuilder provides many additional input fields for key **Visitor** information. All of the fields may not apply to all of your prospects – however, each one has a purpose and you put them to use whether for reporting, follow-up or sales purposes.

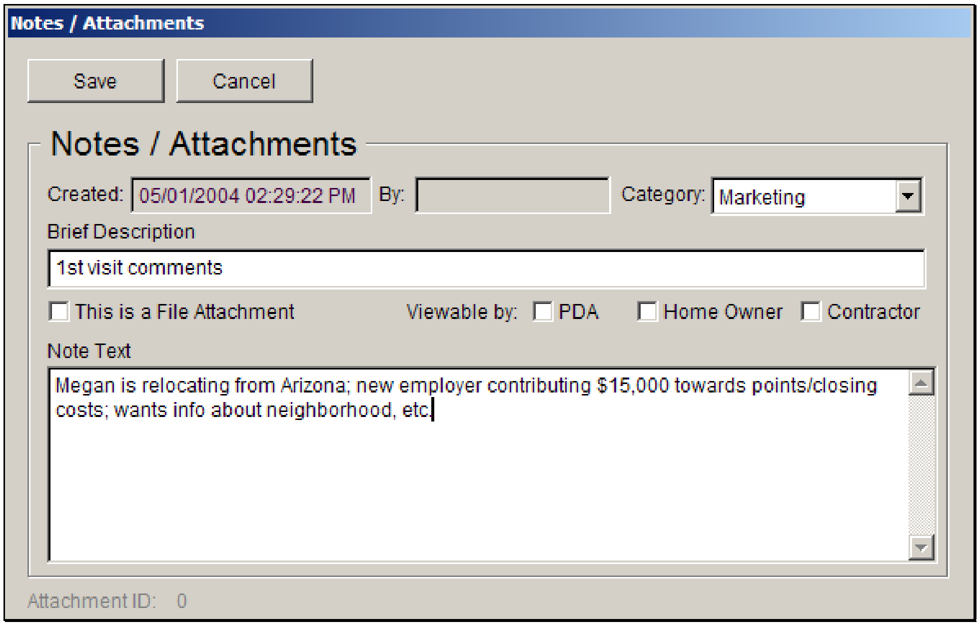
SQLSalesBuilder provides a unique capability to attach comments, notes, files and pictures to a **Visitor** (or, after **Sale, Buyer**) card. The individual items are stored by date and category so they're easy to review and categorize for reporting purposes. Additionally, the information is summarized on the "face" of the card so "confidential" information is not available with a glance at the card.

To **Add** an item, press + associated with **Notes and Attachments**. A new screen opens:

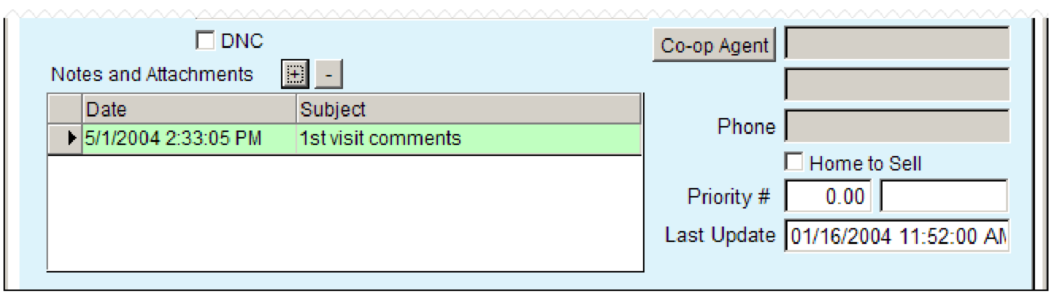


First, select the **Category** you'd like to associate with the note/comment. The **Category** determines where else the item is displayed or printed (Sales Tracking (Mylar) items, for example, appear in Sale/Loan Reports).

Once the **Category** is selected, type a brief summary of the **Notes and Attachment**. The summary description is what identifies the entire item on the **Visitor/Buyer** card. Then, type in the detailed note text. If you'd like to attach a file with the note, so indicate.



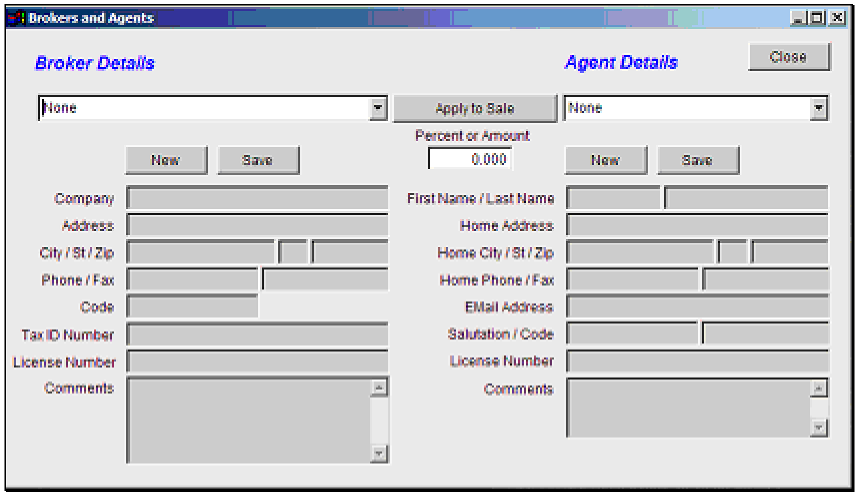
Save the item by pressing Save. The card has been updated:



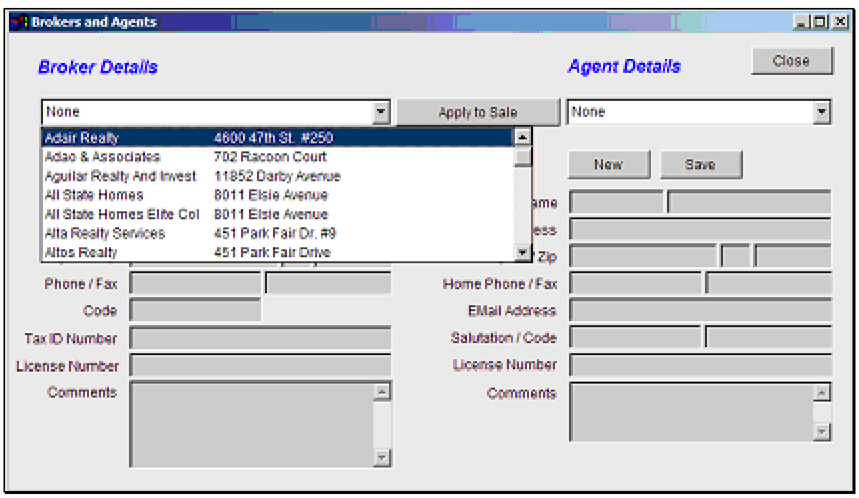
Co-op Agent

Co-op Agents can be a significant traffic and sales source – and tracking their clients and sales may be a key part of your marketing program. **SQLSalesBuilder** provides a complete database focused on this important group of people and you're able to use the information for Sales and Traffic Reporting – as well as follow-up.

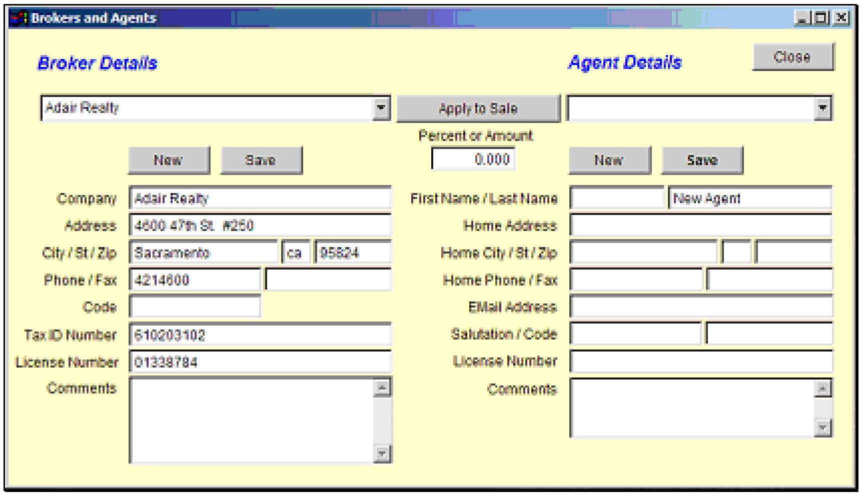
To associate a specific **Co-op Agent** with a prospect, start the process by pressing Co-op Agent. A new window opens:



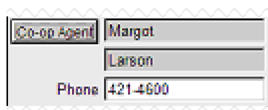
SQLSalesBuilder tries to assist in the identification of the agent. All previously input **Broker** and **Agent** information is available for use via the dropdown windows (and every **Agent** is associated with a **Broker** office). You're able to check or use a **Broker** by selecting from the **Broker Details** dropdown windows:



The example displays making a selection of Adair Realty. Once Adair Realty is selected, all previously input **Agents** associated with that office would be available by selecting from the **Agents Details** dropdown window. If either the **Broker** or **Agent** information isn't available via prior input, press the  button to input the **Agent** information:



Once all the information is input, press Save (to save this new **Agent** to the **Broker**) and Apply to Sale (to associate the information to the **Visitor**). Sometimes, all the **Agent** and **Broker** information is available via dropdown selection and all you need to is Apply to Sale. Once Close is pressed to exit, you'll see the input (or selected) **Agent** associated with the prospect:



Home to Sell

Hm to Sell (optional)

There are times you may wish to input information regarding a **Home to Sell** at the time the prospect visits your sales office. **SQLSalesBuilder** provides 2 opportunities: 1) a simple checkbox allowing you to indicate there's a Home to Sell: ☑ Home to Sell (this information is available at a glance and can be used in a variety of reports).

Additionally, 2) you're able to input and track more detailed information using the **Hm to Sell** tab. This information is generally used as part of your sales agreement package or in custom reports. Input as necessary.

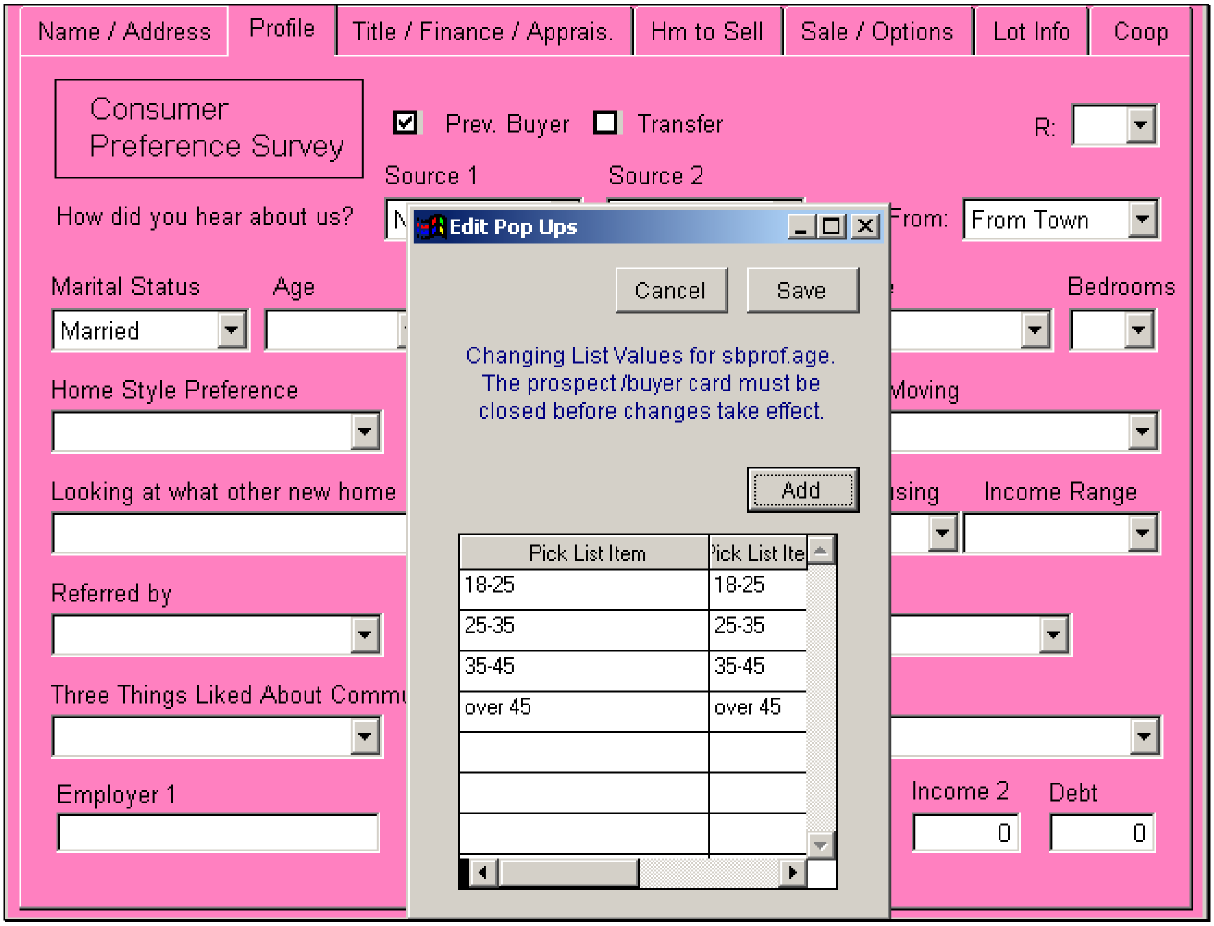
Profile

The **Profile** page provides for Consumer Preference Information that forms the basis for **Traffic** and **Prospect Profile** reporting, **Prospect Follow-up** and future marketing efforts. You're better able to target your prospect database for follow up letters, emails and phone calls based upon responses provided here, e.g. you're able to send a follow up letter highlighting the tax benefits of home ownership to current renters, only – or an email to all "A" rated prospects within 5 days, etc.

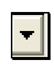
Dropdown Responses

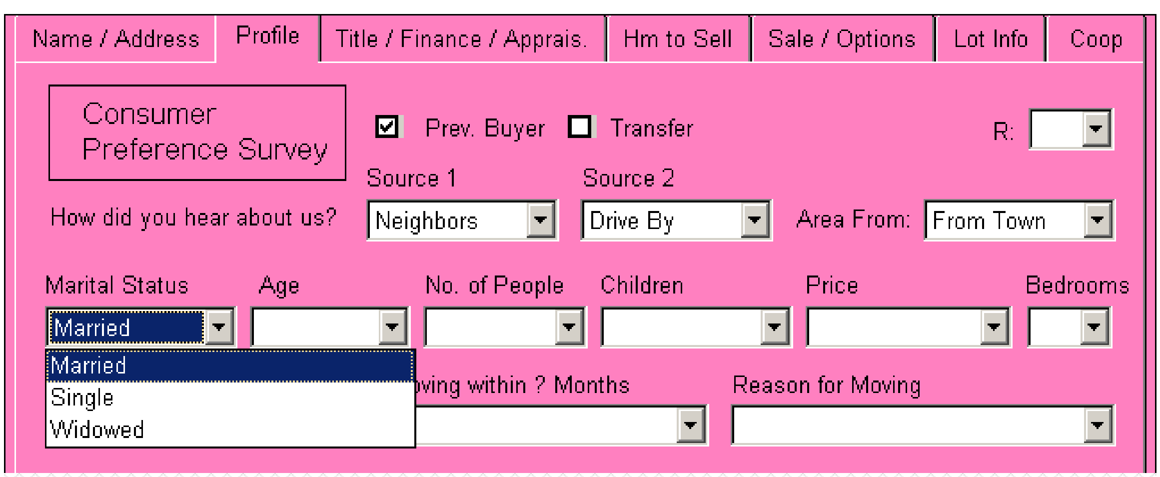
However, before you can input **Profile** responses, the "drop down" responses must be established. Dropdown responses are setup in one of two ways: (1) by division/corporate personnel through **CPS Enterprise** or (2) by sales agents in **SQLSalesBuilder**. Generally, the most effective use of **Profile** information is through common responses collected from multiple sales offices (when appropriate). We suggest having the corporate/division office establish the responses; however, that step isn't always possible.

CPS Enterprise has its own User Guide which details corporate/division setup. To create "drop down" responses within **SQLSalesBuilder**, you need only **right click** the question to start inputting responses:



Press **Add** to input new drop down items (such as 18-25, above). Type the desired response; continue this process until you've added all the desired responses and then press **Save**.

Once the responses are setup, you can select a **Visitor's** response by pressing  and dropping down the response list. Highlight to select the appropriate response.

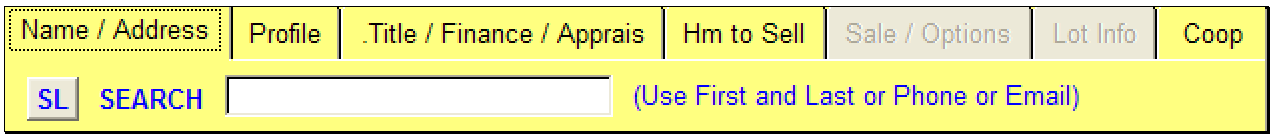


Locating Previously Input Visitors

SQLSalesBuilder allows you to check if a **Visitor** has visited your community previously – or any community within your builder's **SQLSalesBuilder** database. It's your choice to determine whether or not you want to "look up" a prospect in your community list or check throughout your builder's database. Generally, agents check for 2 reasons: 1) so they don't add an additional record and 2) to recall the prospect information for review and/or additional input. Two lookup features are available:

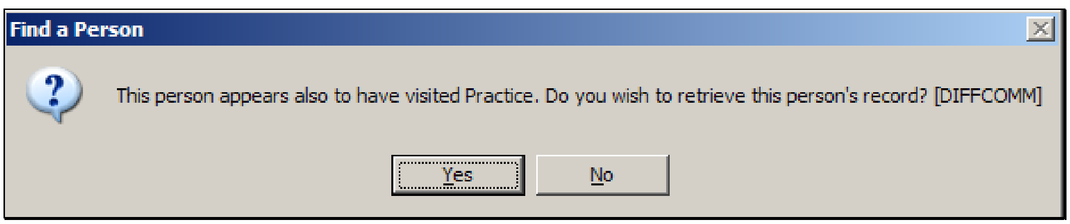
Free form lookup

If you know <u>any</u> of the following: **first name and last name, telephone number** or **email address**, you can type that data info the **SEARCH** field and press the **ENTER** key. Once **SQLSalesBuilder** locates the name, the data appears on the screen.



If there are <u>multiple matches</u> (such as Fred Jones in Los Angeles, CA and Fred Jones in Long Beach, CA), you'll be presented with a pick list; highlight the appropriate person and select.

Note: As mentioned above, many builders have multiple communities and prospects may visit multiple offices. **SQLSalesBuilder** free form lookup will notify the user if the prospect has visited another one of the builder's communities, as well. If the person is located in another community, you're notified:

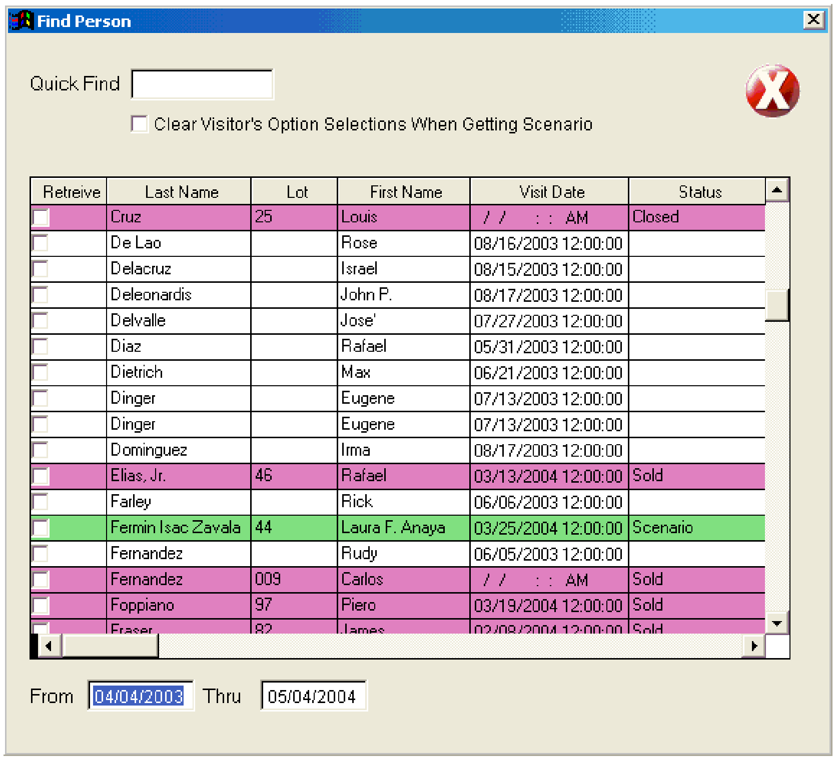


If **Yes** is selected, the same card is used but an additional community record is established. You don't need to reinput data – you can simply add additional information. This prospect will be considered a visitor at each sales office.

Selecting from your community's list

A second choice involves selecting a name from <u>your community's</u> **Visitor/Buyer list** -- optionally, narrowed down by date. Press the **LookUp** button:

You're presented with a list (made up of **Buyers** and **Visitors** – color-coded -- to review and select from:

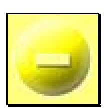


If you wish to locate a person more quickly than scrolling through the list, enter their partial or whole last name into the box labeled **Quick Find** and you'll be directed to the first name matching your input (in the example above, Smith). Additionally, you may "narrow" your search by inputting a date range (the last month, etc.).

Deleting Visitors

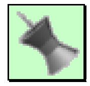
It is almost never necessary to delete a visitor record. The amount of space taken by it is negligible. There is no disadvantage to having visitors in your list who have not purchased a house from you. The information you entered on their card may come in handy for future statistical analysis – or follow-up when a new community opens.

However, if you make a mistake, or for some other reason need to remove a visitor, load the visitor you wish to delete and click the **delete** button:

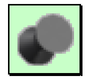


Windows and Push-Pins

For each part of the **Sales Presentation**, a new window is displayed. When you finish with a window, such as when you enter a new visitor, you can skip ahead to the next step (usually the lot selection) by clicking on the next button on the toolbar. By default, when you click on the next button, the "open" window automatically closes, and the new one opens in its place. However, if you wish to keep a window open while moving to a new function, simply click the button that looks like the following:

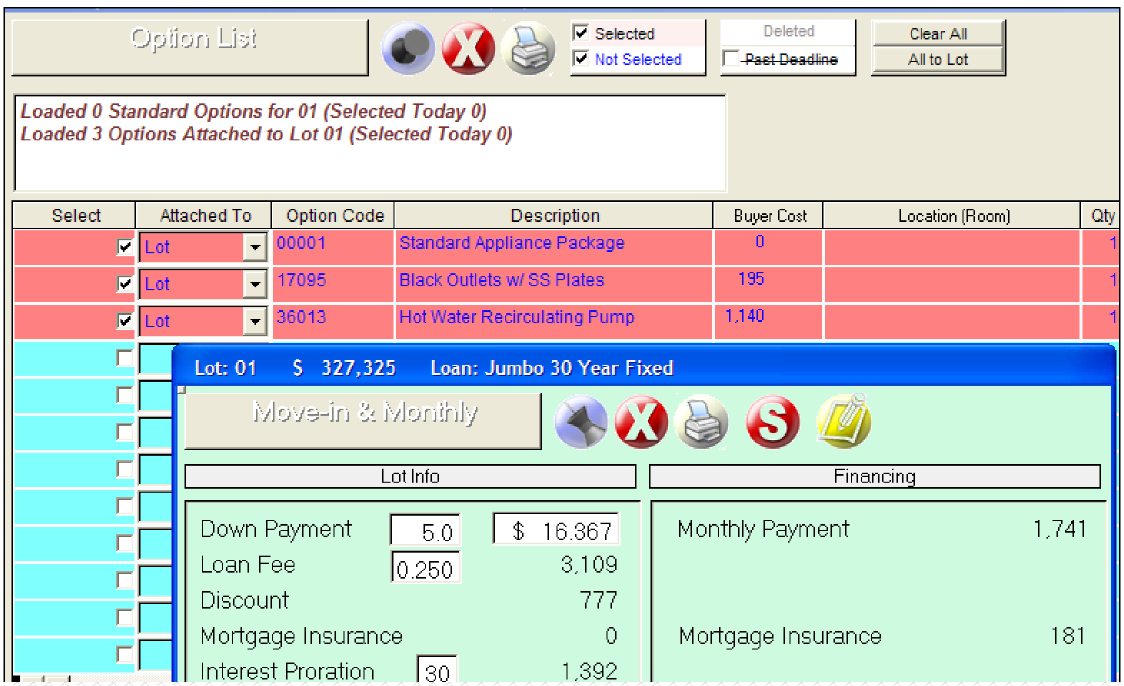


This button is the **pushpin** button. When you click it, two things happen. First, the button changes its appearance to the following:



More importantly, the current window remains open -- despite what other windows you open. This functionality is very useful for flipping between windows rapidly or comparing information from several different windows. Please note: only one window of a given type can be open at a time. For example, only one visitor window can be open at any given time.

Below is an example of two windows open at the same time using **pushpins**:



In this example, the **Agent** found it useful to switch between the **Option List** and **Move-in & Monthly** screens to see the results of new options on the monthly payment.

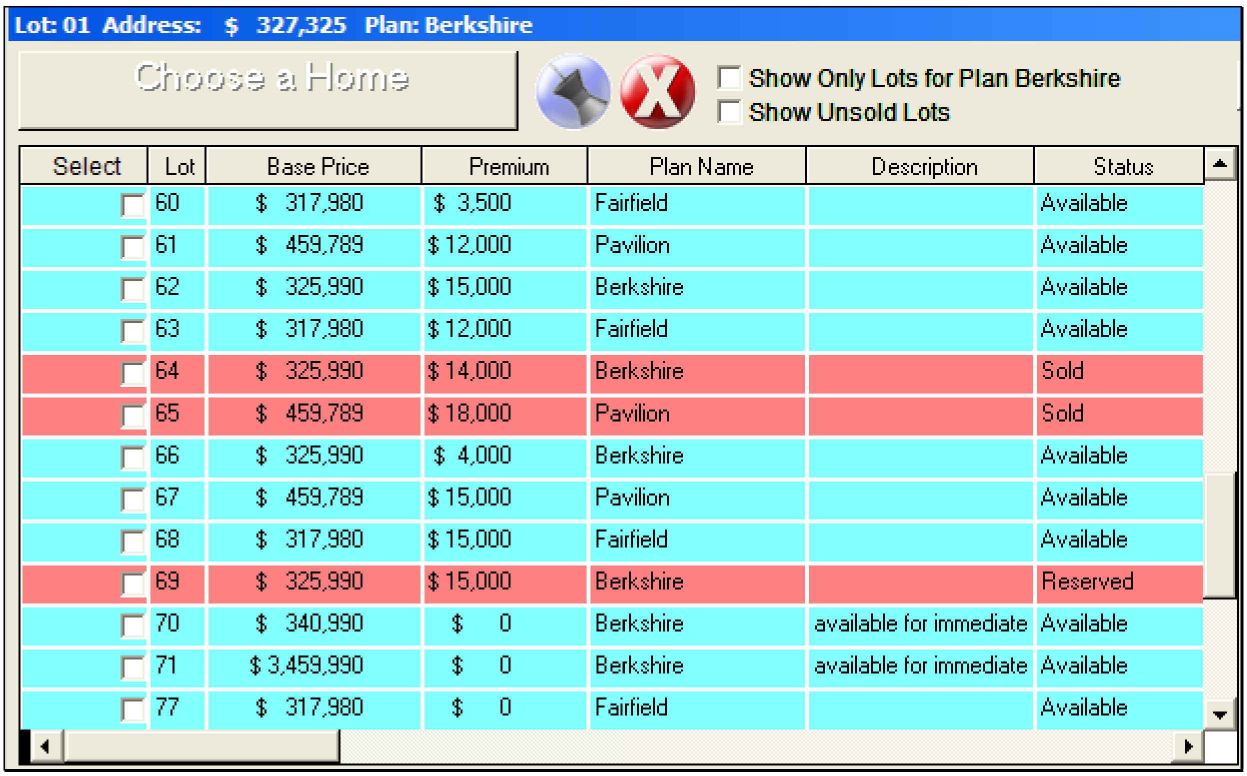
Plan and Lot Selection

Now that you've either entered or retrieved your **Visito**r, let's move on to the next step: selecting a **Plan** and **Lot**. **SQLSalesBuilder** manages communities with either **Preplotted Plans/Lots** or **Any Home on Any Lot**" scenarios.

Selecting a Plan and Lot

Click on the **Select a Lot** button:

Once you do, the **Choose a Home** window appears:



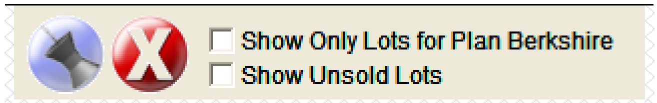
Select	Lot	Base Price	Premium	Plan Name	Description	Status
	60	$ 317,980	$ 3,500	Fairfield		Available
	61	$ 459,789	$ 12,000	Pavilion		Available
	62	$ 325,990	$ 15,000	Berkshire		Available
	63	$ 317,980	$ 12,000	Fairfield		Available
	64	$ 325,990	$ 14,000	Berkshire		Sold
	65	$ 459,789	$ 18,000	Pavilion		Sold
	66	$ 325,990	$ 4,000	Berkshire		Available
	67	$ 459,789	$ 15,000	Pavilion		Available
	68	$ 317,980	$ 15,000	Fairfield		Available
	69	$ 325,990	$ 15,000	Berkshire		Reserved
	70	$ 340,990	$ 0	Berkshire	available for immediate	Available
	71	$ 3,459,990	$ 0	Berkshire	available for immediate	Available
	77	$ 317,980	$ 0	Fairfield		Available

You may make a selection from the screen, immediately. Or, you may wish to adjust the screen to see either 1) fewer **Lots**; 2) only **Lots** meeting certain criteria or 3) columns presented in an adjusted display. It's easy to adjust the columns – simply highlight the column heading (e.g., Description) and drag it to the location desired (e.g., after the **Lots** number for easy reference). Column presentation is set in **CPS Enterprise**.

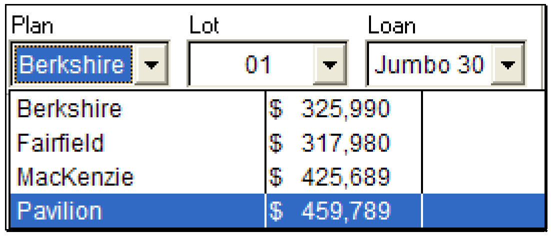
It is also possible to reduce the number – or type -- of lots on the screen by using "**filters**."

Lot Filters

Initially, all **Lots** are displayed. To reduce the list, select a filter from the top of the **Select a Lot** screen:

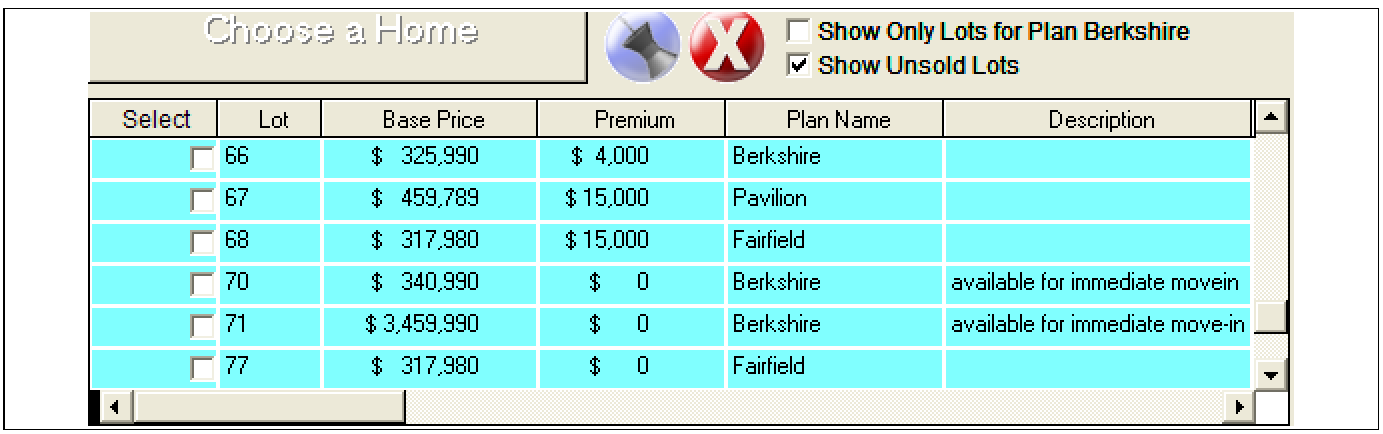


To change the listing of **Lots** (the filter) in your **Lot** list to show a different pre-set plan, choose a different **Plan** from the dropdown list on the **Toolbar**:



Once you select a new **Plan**, the listing of **Lots** will show <u>only the **Lots** for that **Plan**</u>.

If you wish, instead, to view a list of <u>only</u> **Unsold Lots**, all lots, click the appropriate **filter**:



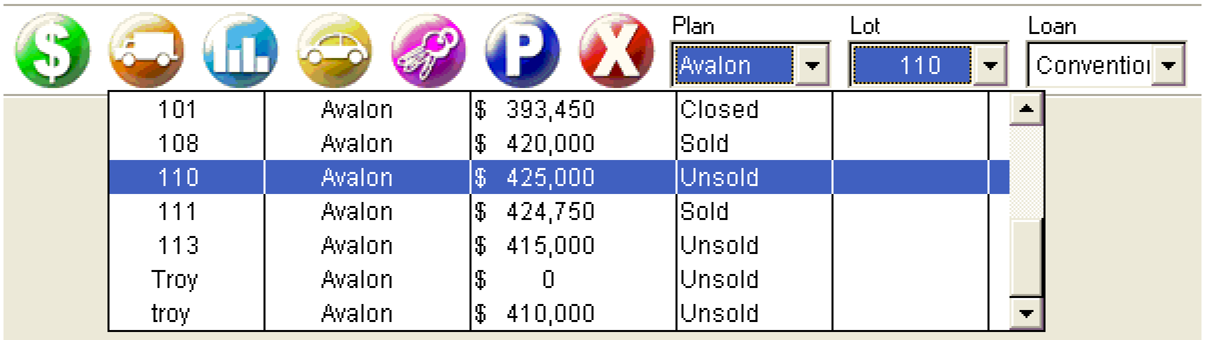
Selecting a Lot

Locate the **Lot** you wish to select, and then click the checkbox in the left-hand column next to that **Lot**. The **Lot** window will close, and the **Lot** selected will be visible in the status bar and the toolbar: It your community is "**Pre-plotted**, a **Lot** selection automatically brings a **Plan**.

However, if your community permits **Visitors** to select a **Plan** on a **Lot** (given the correct "fit), **Lot** selection brings the <u>active</u> **Plan** (the **Plan** appearing on the **Toolbar Lot Selection** dropdown window). See below for more details.

Toolbar Lot Selections

An alternative to selecting a **Lot** from the **Select a Home** window is to simply select it from the **Toolbar**. While you do not have the ability to filter as well as you could from **Choose a Home**, selecting from the toolbar is faster when you already know exactly which **Lot** you wish to select:



Options and Upgrades

SQLSalesBuilder makes it much easier to manage and select **Options** for potential buyers than ever before. **Options/Upgrades** are stored in what is called the **Master Option List**. Generally, your options department at your corporate office will have set up this list for you. If this list has not been set up, you may need to contact your sales manager for more information. If you are the person designated to set up your own option list, you will need access to **CPS Enterprise**.

Options Terminology

Non-Selected Options

The **Master Option List** contains *every* available **Option** – for the selected community and by specific **Plan**. When an **Option** is in the **Master Option List**, but has not been selected or pre-specified (spec), it is called a **Non-selected Option**.

Selected Options

Once a prospect or buyer selects an **Option** – or it has been "**spec**'d", it is copied into what is called the **Selected Option List** and is called a **Selected Option**. **Options** can be selected in two ways:

- By default, **Selected Options** are stored with the current Visitor **scenario**. The **Options** aren't "saved" other than with the **Scenario** associated with the specific **Visitor**. If you were to create another **Scenario** with a different prospect, you'd have to re-select **Options** based on the new prospect's choices.

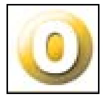
- The second way to store **Options** is to "**spec**" them by lot. This is useful for pre-specified **Options**, such as when a builder determines a house should have a 3-car garage (although a 2-car could have been specified) or when a house is cancelled and some **options/upgrades** were already built. When **Options** are stored with a **Lot**, they will affect *every* **Scenario** -- no matter the **visitor**.

Standard Options

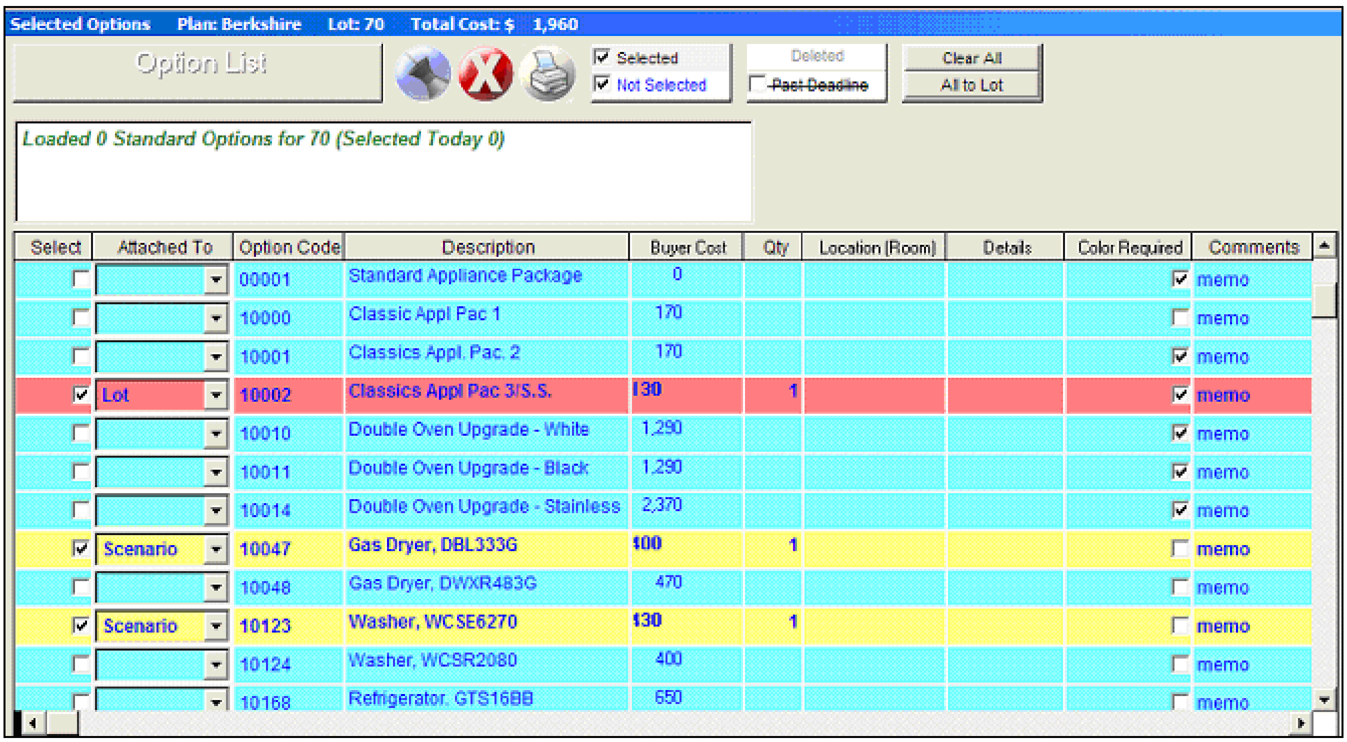
Another way to categorize **Options** is as a **Standard Option**. These **Options** are loaded "automatically" during the scenario – the builder has established certain **Options** as *always* being included with the home. A typical use of **Standard Options** is for those items requiring color or style selections (such as a front door color scheme) – and a selection is needed for every buyer.

Standard Options show up in ***italics*** in the **Option window**. They cannot be added or removed from the lot from the **Option** list window. For information on adding or removing **Standard Options**, please see the **CPS Enterprise** User's Guide.

Click the **Options** button:



You are presented with the **Option List** window such as the one below. In this example, 1 **Option** was pre-specified (Classics Appl Pac 3/S.S.) and the prospect selected 2 **Options** (Gas Dryer and Washer). We determined this by checking either the color-coding or the **Attached To** identification.



Typically, an **Agent** would step through the list with a prospect to make **Option** selections as follows:

- Use the **Select** box to indicate the **Option** is desired;
- Indicate how to **Attach** the **Option** (**Lot** or **Scenario**).

Continue making **Option Selections** – as appropriate. To make the process easier (as the **Master Option List** can be very extensive and there may be a number of options selected, as well), use the screen and available **filters** to provide information and narrow the list by any number of criteria:

- The number of **Standard Options** and **Options** attached to lot are shown in a summary at the upper left hand portion of the window underneath **Option List**. Note: **Standard Options** will show up in Italics and cannot be removed from the lot.

- The **Clear All** button removes all option selections for the **Lot** and the **Scenario**. Use this button *carefully* as it will remove all pre-specified **Options** from the **Lot** – and is intended as an editing tool.

- The **All to Lot** button will change *every* **Scenario Option** to an option attached to the **Lot**. Generally, an agent might use this technique after creating and reviewing several "spec" scenarios with the builder.

- **Selected** displays only those items selected (usually a good, final step to review all selections).

- **Not selected** allows you to focus on the remaining, available options.

- **Past deadline** draws a line through all options past their construction deadline (as defined in the **Master Option List**). Please, see the **CPS Enterprise** User Guide for more information re: deadlines.

Option Details

The **Option** window displayed above shows some of the columns available. **CPS Enterprise** sets the display; however, you may temporarily move columns left to right, as well.

Note: **double-clicking** the column-heading sorts the data in ascending/descending order – e.g., numerically or alphabetically (e.g., to sort by code or style number). Some of the more frequently displayed columns are:

- The **Option Code** column displays the option code; preset in the **Master Option List**.

- The **Description** column displays the complete option description; preset in the **Master Option List** (Double-clicking on the option description will bring up an Option Details screen)

- The **Buyer Cost** column displays the cost to be added to the purchase price; preset in the **Master Option List.**

- **Quantity** reflects the number desired; **add** additional items by highlighting and typing in the new quantity.

- The **Location** column displays the location in the home for the option. It may be preset in the **Master Option List** – or may be determined during the selection process. If determined by the buyer, you are able to type in the column by **clicking** into the available field.

- **Details** provides additional descriptive information beyond that provided in **Description**; preset in the **Master Option List**.

- **Color Required** reminds the agent that a color or style needs to be specified; the requirement is set in the **Master Option List**. Until a color is specified, the option will print with a # next to it as a reminder.

- **Comments** allows the **Agent** to provide additional information at selection time such as "see attached drawing", etc. **Double-click** "memo" to open a freeform text box.

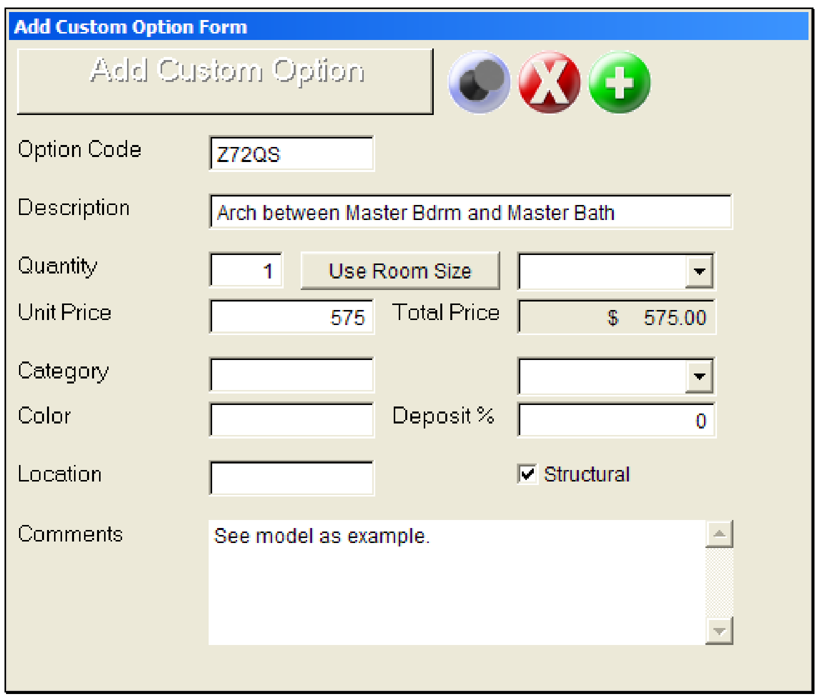
Option List Toolbar

The **Option List Toolbar** can be used as another list **filter** as well as performing other functions:

Toolbar Tips

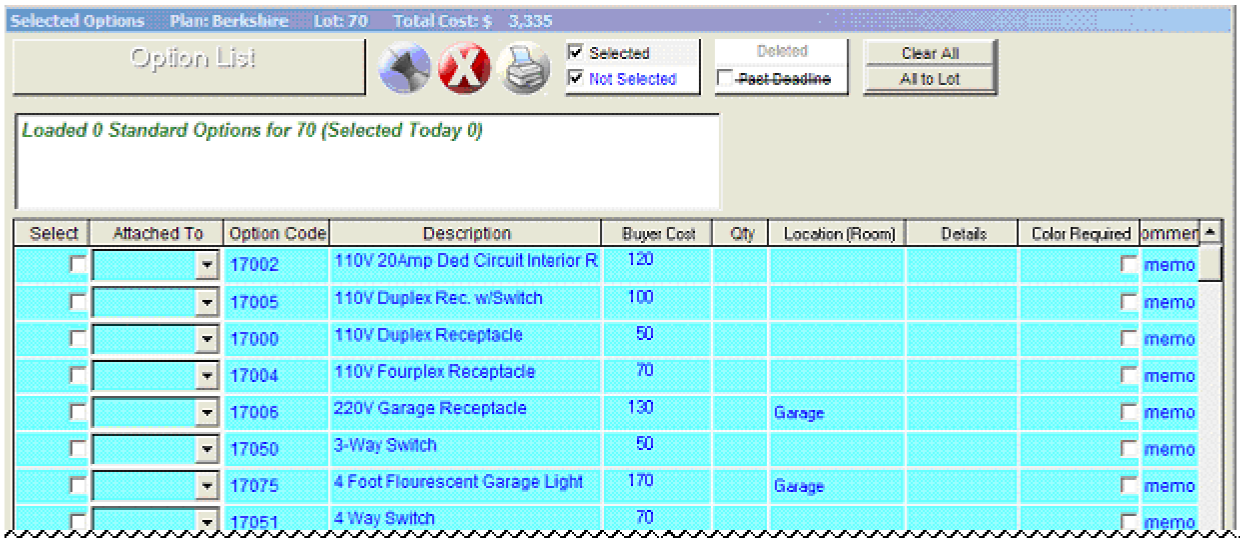
Following is a button description in order from left to right.

- The **Floor Plan** button allows you to view the floor plan for the current lot (if setup previously).
- The **Save Options** button will save all of your option selections to either the **Lot** or the **Scenario**.
- The **Print Option** list button will print a copy of the **Master Option List.**
- The **Custom** option button will allow you to add a custom (or non-standard) option. Use **Room Size** permits calculations for items such as flooring, window coverings, etc.



- **Option Type** allows you to review the list by category, such as appliances, cabinets, etc. This feature is used frequently.
- **Location** allows you to filter the list by location, e.g. all kitchen options, etc.
- The **Design** and **Sales** checkboxes permits filtering by "selection area" to show design center options, sales office options, or both (note: the designations are established within the **Master Option List**).

The example, below, displays an **Option List** filtered by **Option Type** (electrical, in this case):



Note, also, the use of **Location** to indicate that the 220V and 4 ft Fluorescent Light are available in the Garage, only.

Printing Selected Options

Select the **Options** you wish by checking the checkbox in the left-hand column. You can print a list of the **Options** you have selected for your **Visitor** to take home by pressing the **Print** button:

Once you have completed selecting the desired **Options**, click the Close button.

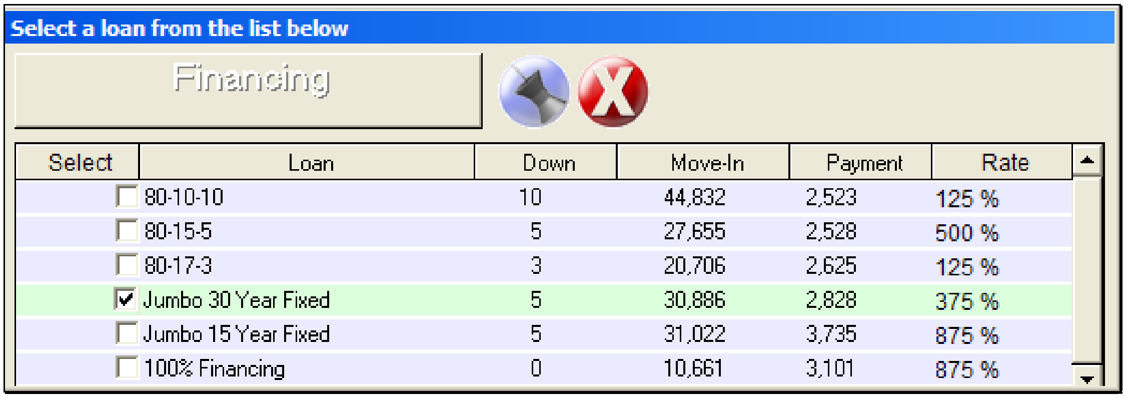
Financing

SQLSalesBuilder's Financing capability allows sales agents to present a variety of loan programs with their corresponding move-in costs and monthly payments to illustrate prospect and buyer's mortgage options. All of the financing information is input in **CPS Enterprise's Loan Maintenance** function.

Loan Selection

To open the Financing window, click the **Loan** button:

The following window will appear:

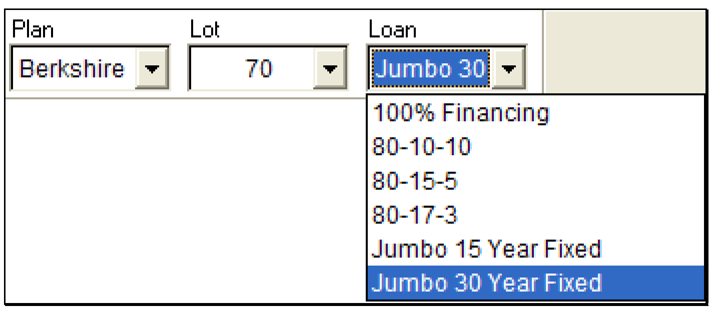


The **Financing** window automatically calculates the move-in and monthly costs for the minimum down payment (based on the price and previously set-up **Loan** information). This gives a quick and easy way to discern some of the costs that will be involved before selecting a **Loan**

Select the **Loan** desired by clicking the checkbox in the left-hand column.

Toolbar Use

You can also select a preferred **Loan** from the **Toolbar**. This step is utilized more frequently from the **Move-In and Monthly** process, however.

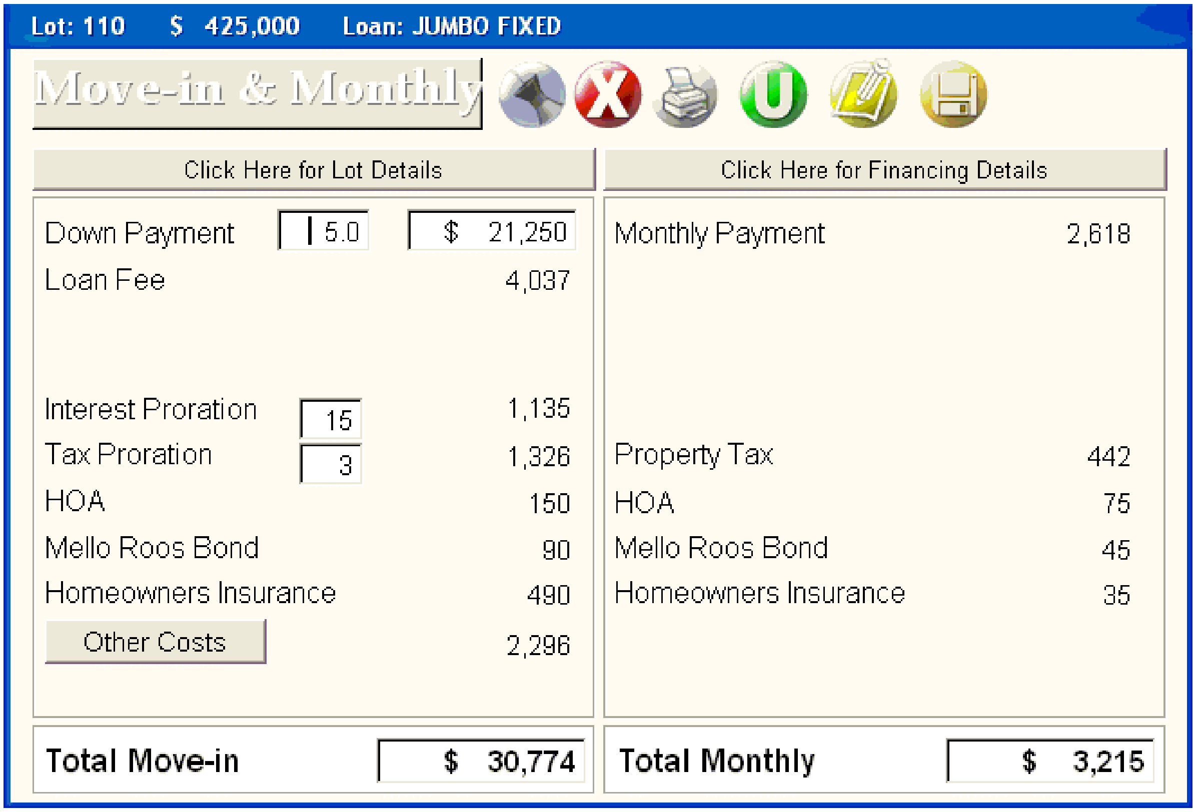


Move-In and Monthly Cost Estimate

What is the Move-in and Monthly?

The **Move-In and Monthly** window contains a summary of all selections (and pricing) made up to this point. To access it, click the **Move-In** button:

You are presented with the **Move-In and Monthly** window:

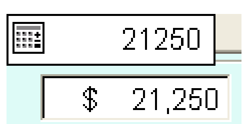


The **Move-in and Monthly** displays the minimum down payment for the selected **Loan** program. The **Agent** can modify the various elements to better meet the prospects financial needs (e.g. "what if" I put more money down, etc.).

"What if?" Presentations

Any item displayed in white (e.g. down payment, loan fee, etc.) is one that can be modified. To do so, place the mouse cursor into the field by clicking into it. Type your desired value in the pop-up box, then tab or mouse out of the field when finished. The rest of the fields on the screen will recalculate to reflect the changes you have made. For example, if you wish to change the down payment amount: click on the down payment box, enter the desired amount into the down payment amount field, then press the **Enter** or **Tab** key on your keyboard when finished:

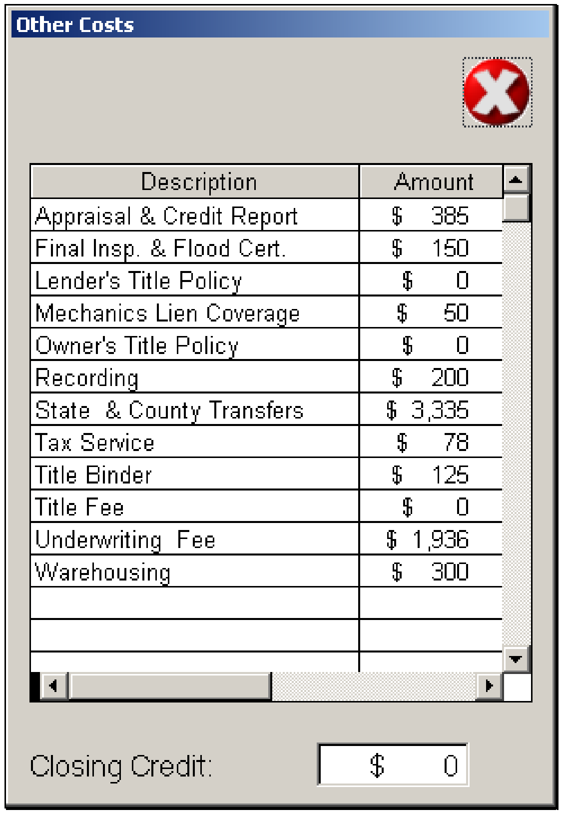
Notice when you click into the field, a small pop-up input box appears:



This box allows you to either enter a new value directly, or to use the calculator feature to generate a value.

Other Costs

Some of the miscellaneous fees and charges associated with a **Loan** are aggregated and placed into the field labeled **Other Costs**. For a full breakdown of these costs press the **Details** button next to the **Other Costs** field:



Other Costs

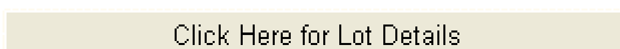
Description	Amount
Appraisal & Credit Report	$ 385
Final Insp. & Flood Cert.	$ 150
Lender's Title Policy	$ 0
Mechanics Lien Coverage	$ 50
Owner's Title Policy	$ 0
Recording	$ 200
State & County Transfers	$ 3,335
Tax Service	$ 78
Title Binder	$ 125
Title Fee	$ 0
Underwriting Fee	$ 1,936
Warehousing	$ 300

Closing Credit: $ 0

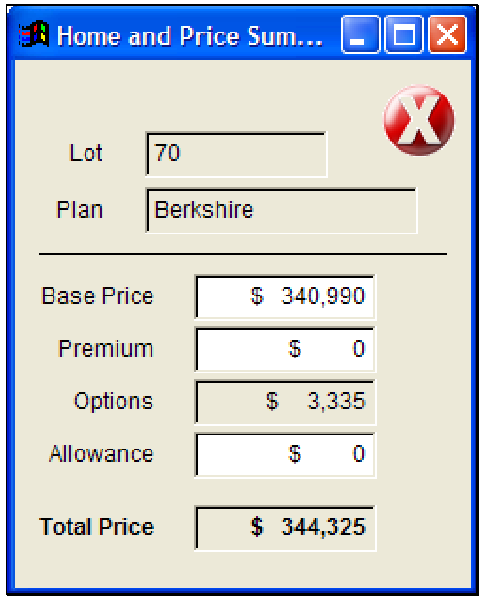
These fees are calculated based on information setup in the **Loan Maintenance** area. Please refer to your corporate office/lender or the **CPS Enterprise** User Guide for a more detailed explanation.

Pricing changes

To review and/or make changes to some of the **Lot** pricing information, click the **Lot Info** area:



The **Home and Price Summary** window appears:



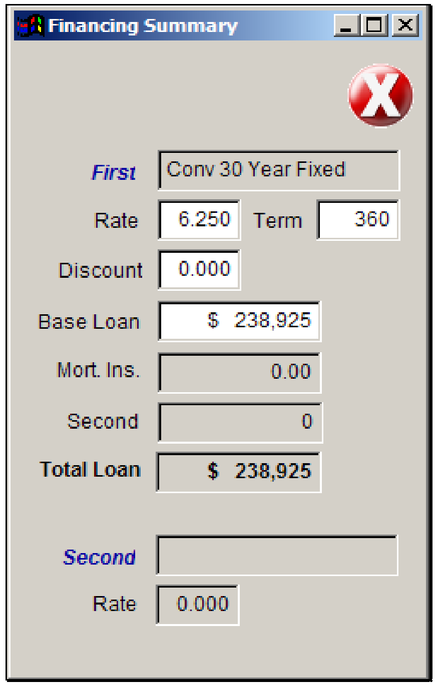
Once selected, it is possible to adjust the **Base Price**, **Lot Premium** and/or **Allowance.** These changes are for this **Scenario,** only. If a **Sale** is recorded, the adjusted **Pricing** is in effect. However, selecting this **Lot/Plan** in the future will result in use of **Lot/Plan Prices**.

Any **Options** adjustments must be made through the **Options** screen. To close the window, click the **Close** button.

Financing Changes

To review and/or make changes to **Interest Rates, Loan Terms**, etc., click the **Financing** area:

The **Financing Summary** window will appear and similar changes may be made (the most frequently changed **Interest Rate**, followed by **Loan Term**). To close the window, click the **close** button. Again, these changes are for this **Scenario,** only.

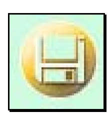


Printing a Move-In and Monthly Handout

Once all of the specifics for the **Scenario/Sale** have been finalized, you can print out a summary page of information for the potential buyer to take home. To do so, click the **Print** button:

Saving the Scenario

All the details about the **Scenario** can be saved for your **Visitor**– for quick retrieval the next visit, to review in a phone call or to modify in subsequent conversations. To save the details of this **Scenario** (for the active prospect), click the **Save** button:



Once you do, the **Scenario** (including the prospect name and selected plan/lot/options) can later be retrieved for completion or modification using the **Links** window. Note: if there have been any price changes since the **Scenario** was saved, the retrieved **Scenario** will reflect the current pricing (you're not able to sell either the home or options/upgrades at a former price, in other words).

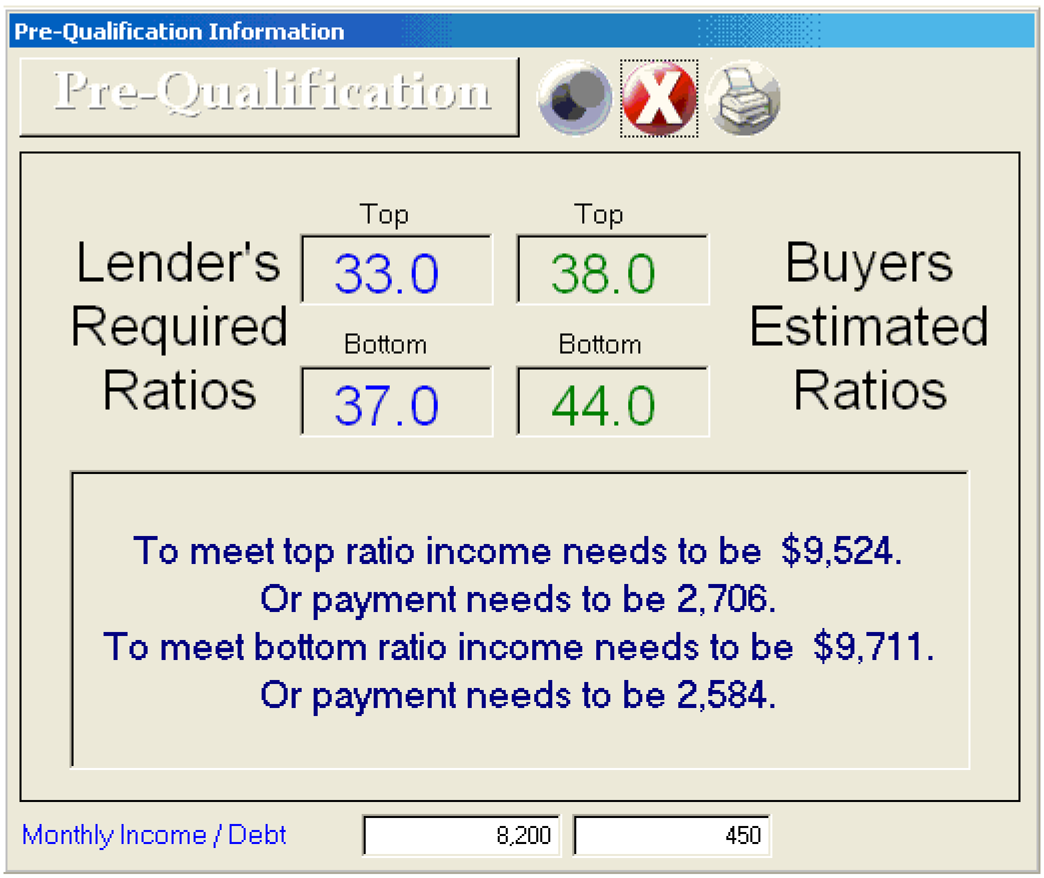
It isn't necessary to save every **Scenario**; however, if you can anticipate the prospect returning or you expect to progress onto **sale**, save!

Pre-Qualification

Pre-qualification Info

Your **Visitors** can be pre-qualified – for the specific **Scenario** using the selected **Loan** -- by using the **Pre-qualification** tool. To do so, click the **Pre-qualification** button:

This opens the **Pre-Qualification** window:



Enter the visitor's **Monthly Income** and **Monthly Debt** into the boxes at the bottom. Press the **Tab** or **Enter** key to display the results.

Ratios

The **Buyers Estimated Ratios** (in green) will display next to the **Lender's Required Ratios** (in blue). If the top and / or bottom ratios are not met, a recommendation for income, payment, and monthly debt are made for the buyer. The ratio's are typically established based on LTV (loan-to-value) and are setup in **CPS Enterprise Loan Maintenance.**

Congratulations! You've learned the basics of SQLSalesBuilder – **Visitor Registration**, **Lot/Plan/Loan/Option** selection, preparation of the **Move-in** costs and **Monthly** payments and **Pre-qualification.** We suggest developing working through this process to develop a comfort level as well as a personal presentation style. Some **Agents** input the prospect, select a **Lot/Plan** and go directly to the **Move-in** screen; they add **Options** much later. Others want their **Visitors** to "build" the home completely…**SQLSalesBuilder** works in both those cases and will work with your presentation style, as well.

Chapter

4

Sales, Cancellations, Transfers and Sales Tracking

You've worked with your **Visitor** developing all the details of the sale – lot, plan, loan program, options and upgrades – and they've made their purchase decision. You're able to utilize **SQLSalesBuilder** to **Record the Sale** and, optionally, **print** your **Sales Agreement** package. As the home is being built, use **SQLSalesBuilder** to **Track the Status** of the loan and various activities such as appointments, title details and walk-throughs – and you'll be able to use this information to print various reports such as Weekly Sales, Projected Closings, Escrow Tracking, etc. Inevitably, unfortunately, there may be **Cancellations** and **Lot Transfers** and you're able to use **SQLSalesBuilder** to manage the sale and have everything ready for a new buyer.

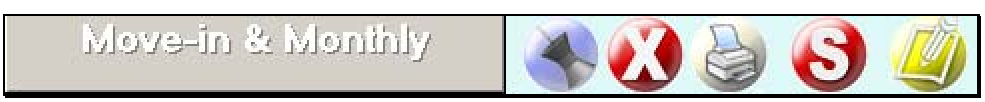
Recording a Sale (without printing a Purchase Agreement)

Prior to recording a sale, it is essential that 2 **SQLSalesBuilder** items be established and active: the **Visitor** name and the terms of the sale as detailed in the **Move-in and Monthly** screen. Make adjustments, if necessary; Chapter **3** in this Guide provides guidelines to change the down payment, Option selections, etc.

Move-in and Monthly Use

If your **Visitor** decides to move forward with the **Sale** and become a **Buyer**, you must be at the **Move-in and Monthly** screen to record the sale. Double-check that the details are correct; we suggest printing the details one final time for your **Buyer** to review – any last minute changes can still be made, easily.

At this point, you have at least 2 choices on the **Move-in and Monthly ToolBar:**

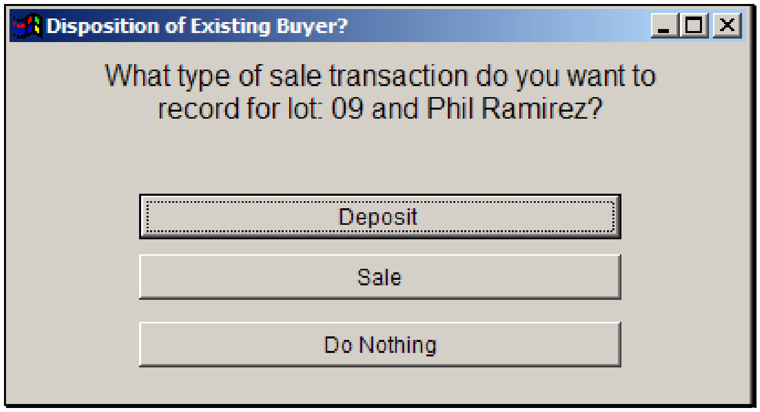


To **Print**, press:

To **Record the Sale**, press:

Recording a Sale Choices

Once **Record a Sale** is selected, you are prompted with the following window:



From here you must make a choice. You can:

1.) **Record** the sale as a reservation with **Deposit**. This will identify the lot as having a deposit placed on it. It will not show up as **Sold** until you change the **Link** type from the **Links** window (see **Links** below for more information)

2.) **Record** the sale as a **Sale**. This action marks the lot **Sold.**

3.) **Do Nothing**. This action returns you to the **Move-In and Monthly** window

Recording a Sale (and printing a Sales Agreement Package)

SQLSalesBuilder provides a Sales Agreement Package printing capability. Many builders use this feature to prepare their Purchase Agreement, Job Initiation Order, Change Order, etc. Each builder's agreement is different so the process is "custom designed" for each builder and utilizes a unique **Contract Wizard** format. Typically, you will receive instructions based on your builder's unique package. However, the process begins in exactly the same way: you must have the **Visitor** active and the **Move-in and Monthly** screen reflect the sale details.

To start the **Sales Agreement** preparation feature, press:

The **Record a Sale** dialog box (discussed above) displays; if you select either **Deposit** or **Record a Sale**, you will be directed to your builder's custom **Contract Wizard** to prepare the Sales Agreement Package.

If you're not printing your Sales Agreements and would like to explore this option, contact CPS.

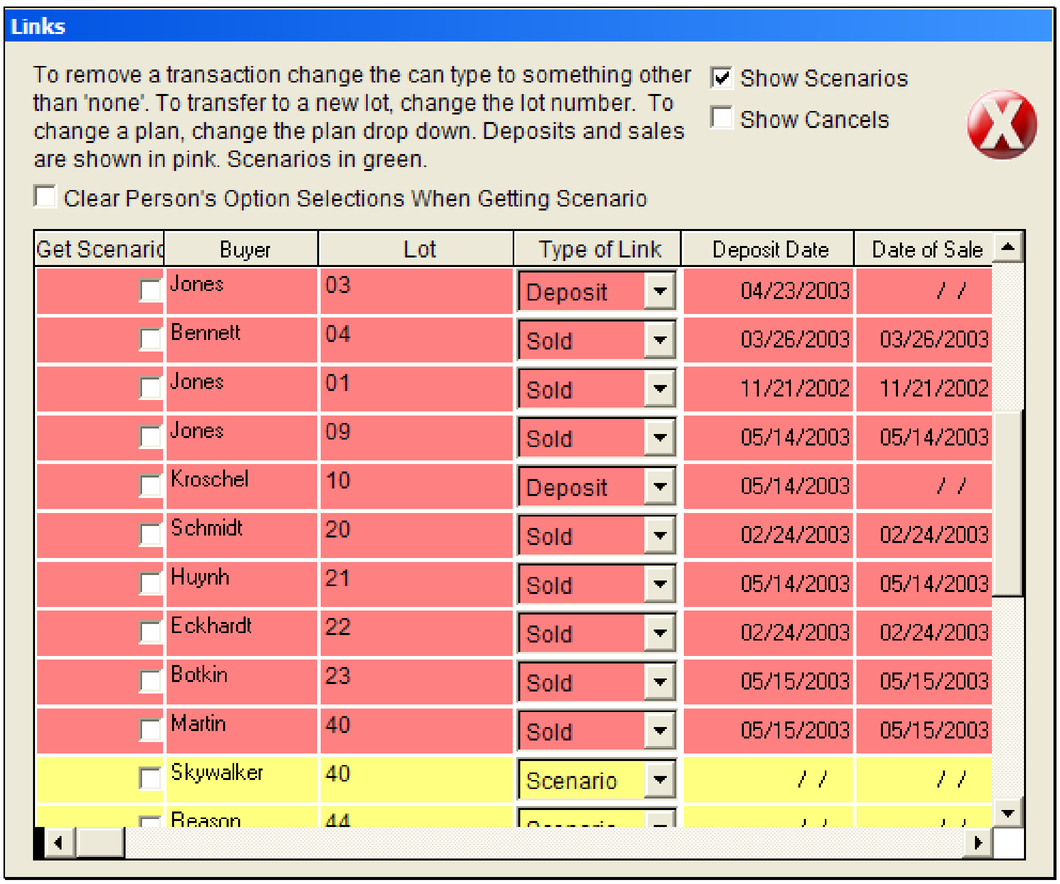
Links

Links are the connections in **SQLSalesBuilder** between **People, Lots, Plans, Options,** and **Loans.** **Links** connects all elements of a **Sale** or **Scenario** and is retrieved by **Visitor/Buyer** name. The **Links** window is used for performing **Cancellations**, **Transfers**, **Lot or Plan** changes, **Sale type** changes (from a deposit to a sale for example), and many other functions involving **Sales** and **Scenarios.**

Links Window

To access the **Links** window, click:

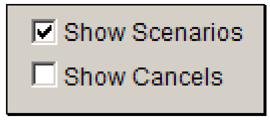
This action opens the **Links** window:



The **Agent** is presented with a list of saved **Scenarios/Sales** – for both **Buyers** and **Visitors** -- each connected to a lot. The list is color coded – based upon previously setup colors identifying **Visitors** and **Buyers.**

Filtering Links

Filter the **Links** window (e.g., determine what type of **Links** to view) to narrow your view:



Your list will be considerably shorter if you're able to determine which records you'd like to review or select.

Sorting the Links Window

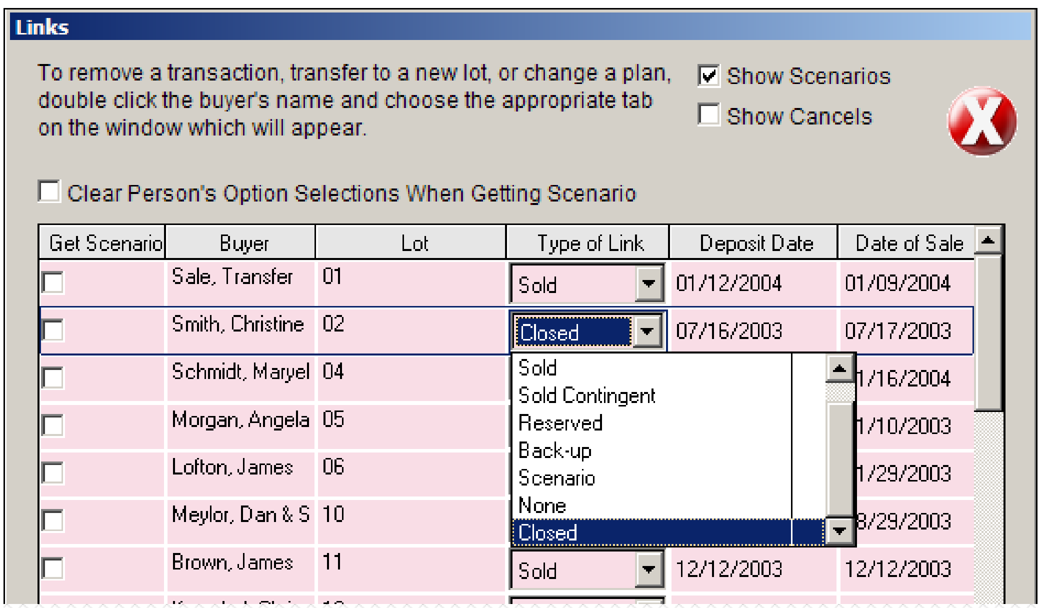
Additionally, you're able to **Sort** the list by **double-clicking** the column heading (**Last Name,** for example).

Retrieving a Scenario or Sale

Once you have determined which **Visitor Scenario** or **Buyer** record is desired, click on the **Selection** box to retrieve all the information. You'll be returned to the **Move-in and Monthly** screen; in addition, the **Status Bar** contains the information and you'll have immediate access to the **Visitor/Buyer** card. Make any changes you'd like; please, remember to **Save** after any changes to the **Visitor/Buyer** card or **Lot/Plan/Options** selections.

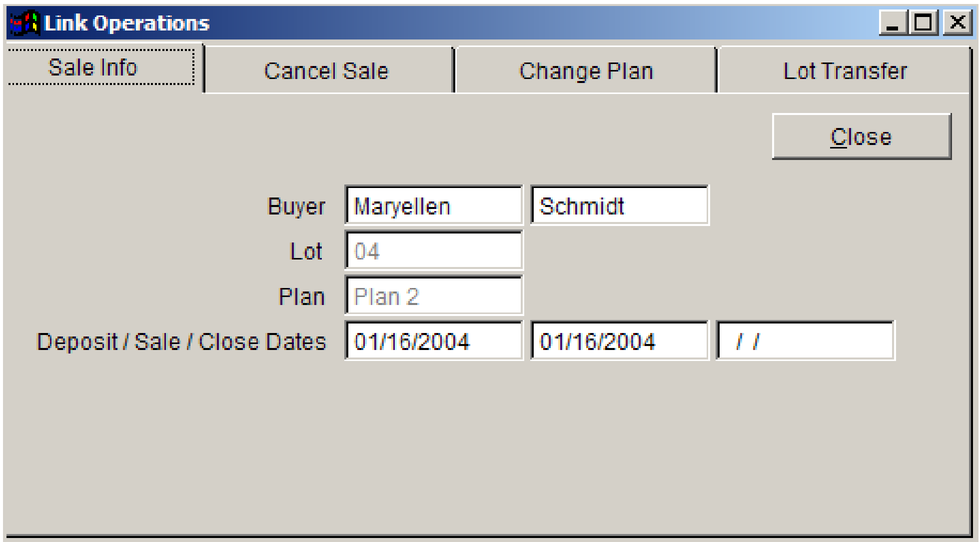
Changing Sale Status (Deposit-to-Sale, Closed, etc.)

Links provides the mechanism to adjust the status of a **Sold Lot.** – that is, from **Sold** to **Closed** or **Deposit** to **Sold.** Once the **Links** window is open, drop down the **Type of Link** list and <u>highlight</u> the new status to make a selection:



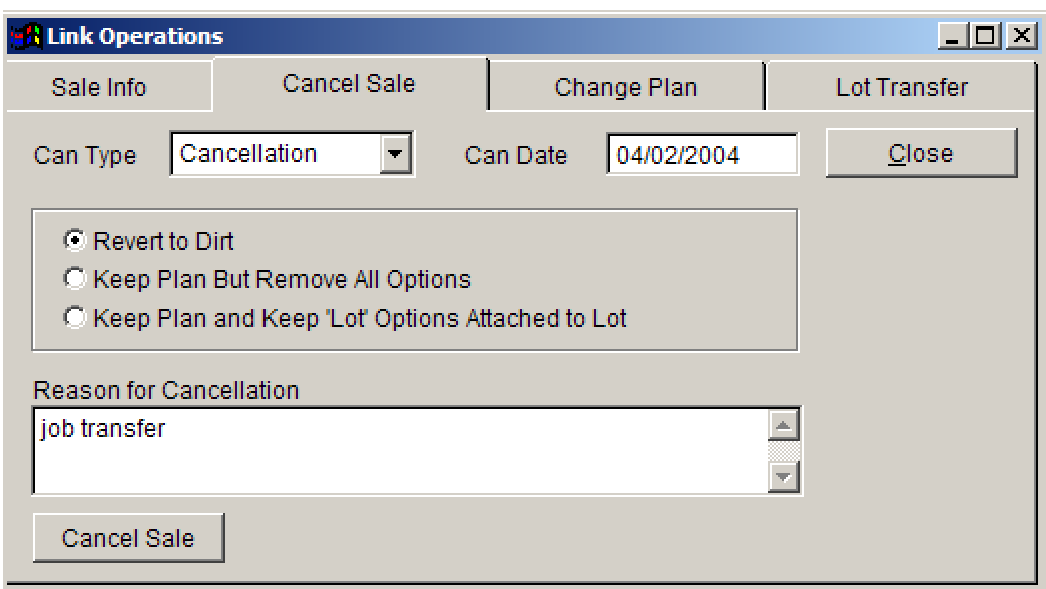
Sale Cancellations, Lot Transfers, Plan Changes

Cancellations and **Transfers** are also managed through the **Links** screen; however, the process is slightly different as there are additional considerations. Open the **Links** window and double-**click** the selected **Buyer:**



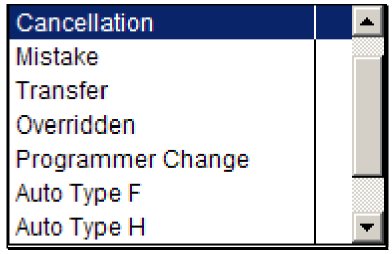
Canceling a Sale

Select the **Cancel Sale** tab:



There are several steps to processing the **Cancellation**:

1) Select the **Can Type** from the dropdown window (the **Type** determines how the **Cancellation** will be identified in reports, etc.:



- **Cancellation**: The **Sale** is **Cancelled** and will be reported as such on the **Sales Report**.

- **Mistake:** Somehow, a **Sale** was recorded incorrectly and needs to be removed. This designation DOES NOT appear on the **Sales Report**

- **Transfer:** The **Buyer** remains a **Buyer** BUT wishes to **Transfer** to another **Lot** within the **Community**. The **Sales Report** identifies this change as a **Transfer** (NOT a **Cancellation**).

- **Overridden:** Some builders determine -- at the corporate office --whether or not a **Sale** is accepted; if the decision is "no", this **Cancellation Type** is selected.

- **Programmer Change/Auto Type F/Auto Type H:** CPS selections, only.

2) Once the **Type** is determined, input the **Date** and provide a **Reason.** This information is printed on the **Sales Report.**

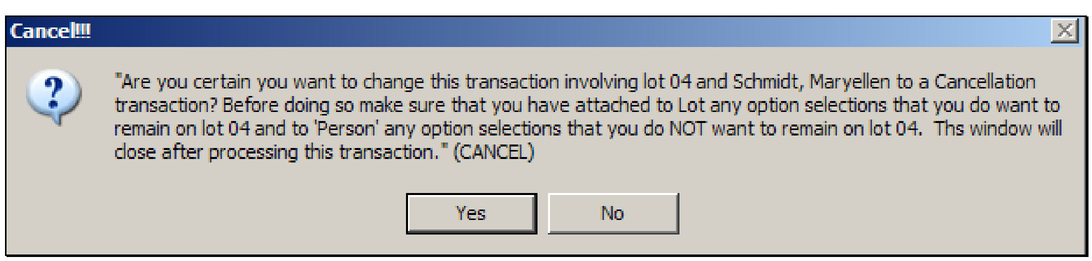
3) Determine **Lot Status:**

- **Revert to Dirt**: Construction has not started; the **Lot** is available for sale <u>without a specified</u> **Plan.** This selection is appropriate only if **Any Home on Any Lot** is established in **CPS Enterprise.**

- **Keep Plan but Remove Options**: Construction is at a preliminary stage and ALL **Option/Upgrade** selections can be removed from the **Lot.** The **Plan** remains associated with the **Lot** (required if **Pre-plotted**; optional if **Any Home on Any Lot**).

- **Keep Plan and Lot Options:** Construction is underway; some/many/all **Option/Upgrade** selections are to remain. Prior to selecting this **Status**, we suggest reviewing previous selections and determining which remain. ALL remaining **Options** must be identified as **Lot Options** – make any adjustments necessary (see **Options** in **Chapter 3** for more detail).

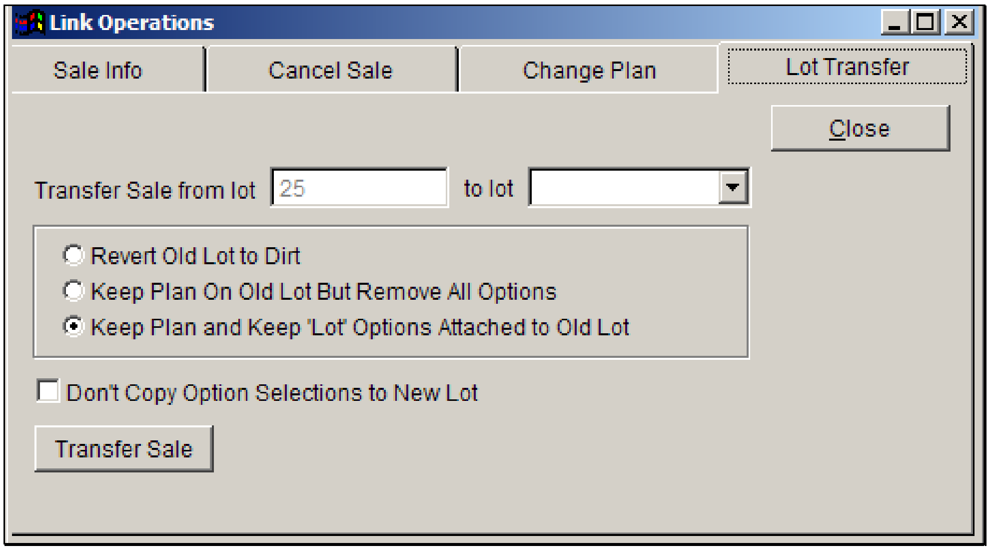
- If selected, you are asked to confirm:

- 

Transferring a Sale

Transferring a Buyer to another Lot has many of the same implications of a Cancellation: as far as Lot Status and Option selections. To some extent, the only difference is the Sales Report.

To transfer a **Sale** to a different **Lot**, select the **Lot Transfer** tab:

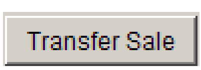


There are several steps to the process:

1) Select the **NEW Lot** from the dropdown (your choices are limited by **Plan**; if your **Buyer** wants to change **Lot** and **Plan**, change **Plan** first).

2) Determine **Lot Status** (as described above); make selection.

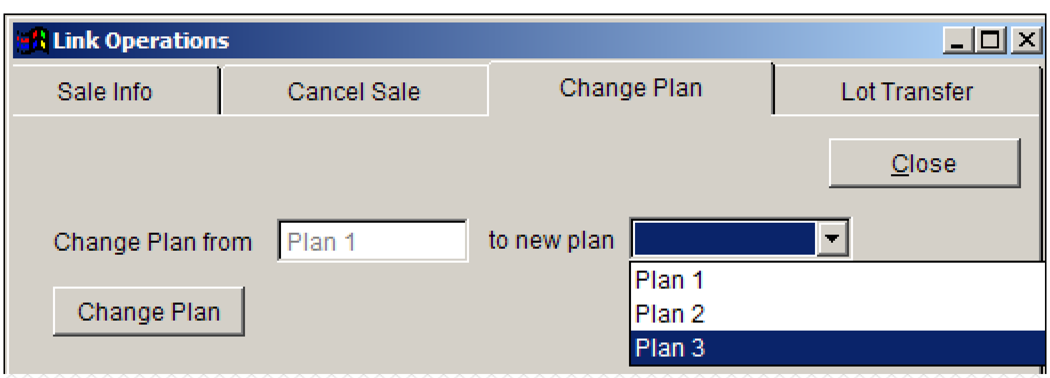
3) Determine whether or not to **Copy Option Selections to New Lot** ; this step is intended to save time so **Agents** do not need to re-select **Options/Upgrades** for a "simple" **Lot Transfer**.

4) Press 

to complete the process.

Changing the Plan

There are limited opportunities when a builder will permit a change to a **Plan** during a **Sale**; however, **Links** provides this option.



1) Select the **Change Plan** tab.

2) Determine the new **Plan** and select it from the drop down window.

3) Press 

.

Impact of Recording a Sale

Recording a Sale has the following results:

1) The person's status is changed from **Visitor** to **Buyer;** Whenever information is retrieved, you'll notice the information is now color-coded for a **Buyer.**

2) The **Lot's** status is changed from **Unsold** to **Sold**; color-coding applies here, too.

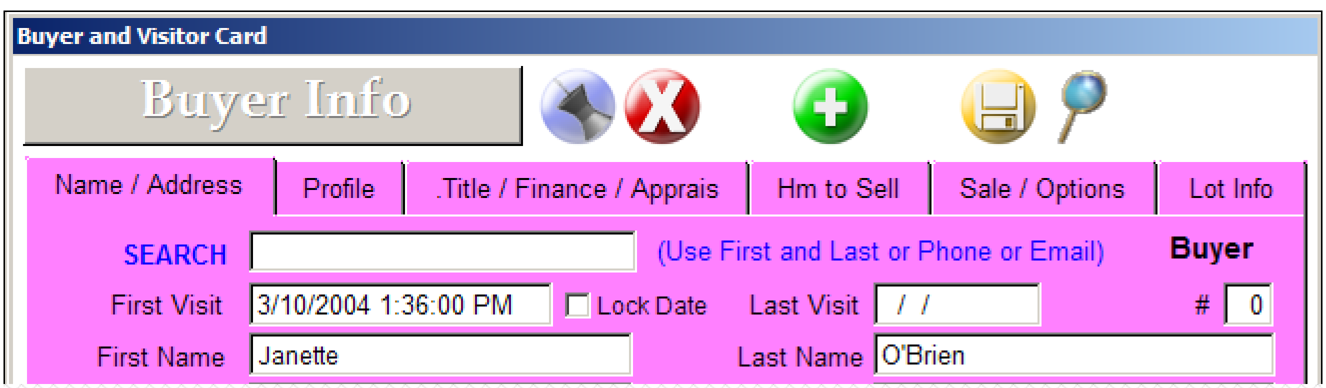
3) **Option** status is changed.

This means you are able to print a **Sales Report**, with up-to-date information, at any time. Additionally, **Sales Tracking** is available as the **Visitor Card** becomes a **Buyer Card** and additional tabs are activated for input.

Buyer Details Tracking

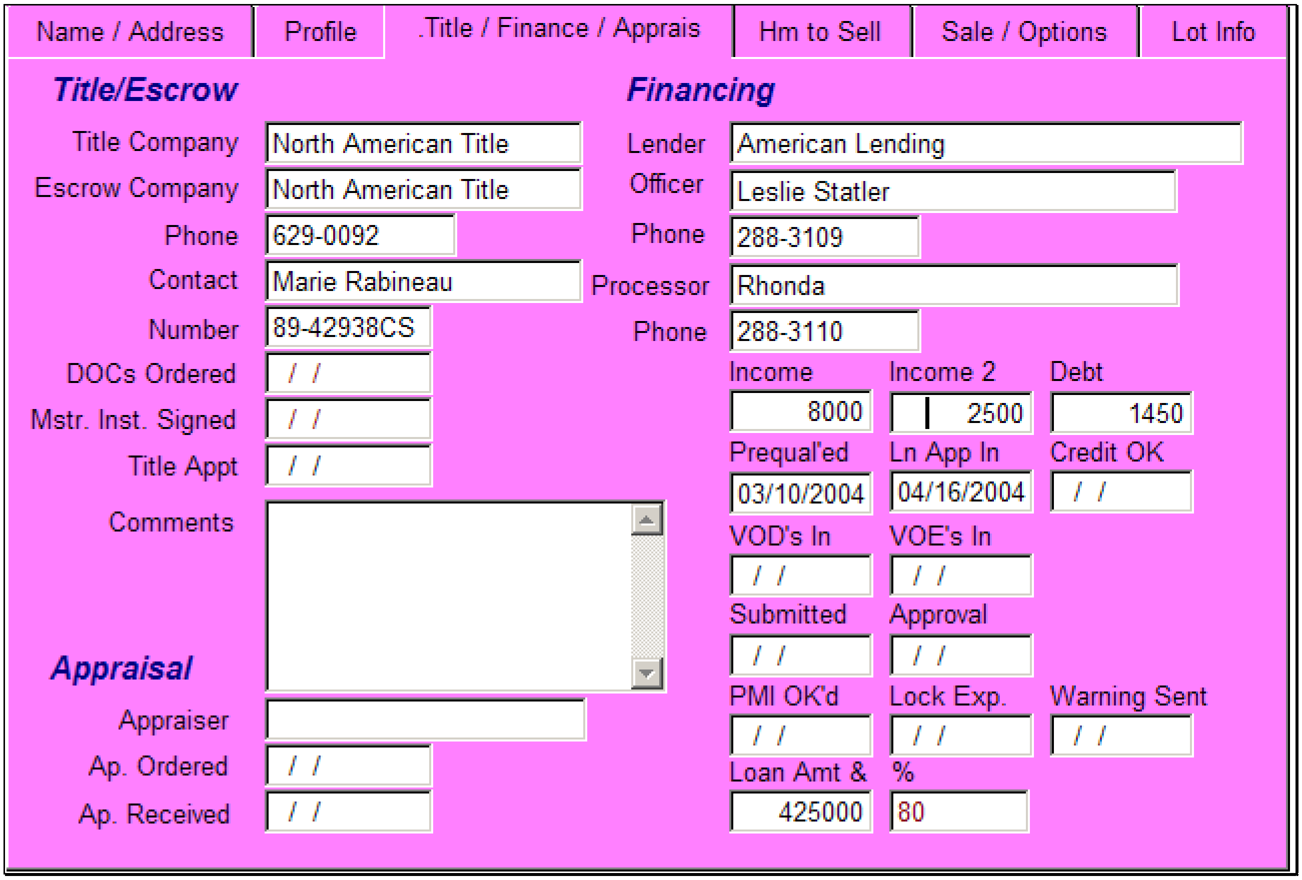
As described above, **Recording a Sale** results in activation of additional tabs on the **Buyer Card**: If your builder uses **SQLSalesBuilder** to prepare and print the Sales Agreement, some of the items are already completed as a result of document preparation. All of the fields are available for update, now; additionally, some builders request "custom" fields to track unique items. See your CPS representative to discuss additional **Tracking** items.

Access the **Buyer Card** through **Links** or **Lookup**:



Buyer Title/Finance/Appraisal

The first new tab is **Title/Finance/Appraisal.** This portion of the Buyer Card is used to record and track key dates associated with Title, Appraisal and Lender functions. Some of the data is completed as a result of recording and additional information may come from Sales Agreement preparation. Input data as it becomes available; this information forms the basis of the Sales Report, Escrow Tracking and Projected Closings reports.


Name / Address
Profile
.Title / Finance / Apprais
Hm to Sell
Sale / Options
Lot Info
Title/Escrow
Title Company
North American Title
Escrow Company
North American Title
Phone
629-0092
Contact
Marie Rabineau
Number
89-42938CS
DOCs Ordered
/ /
Mstr. Inst. Signed
/ /
Title Appt
/ /
Comments
Appraisal
Appraiser
Ap. Ordered
/ /
Ap. Received
/ /
Financing
Lender
American Lending
Officer
Leslie Statler
Phone
288-3109
Processor
Rhonda
Phone
288-3110
Income
8000
Income 2
2500
Debt
1450
Prequal'ed
03/10/2004
Ln App In
04/16/2004
Credit OK
/ /
VOD's In
/ /
VOE's In
/ /
Submitted
/ /
Approval
/ /
PMI OK'd
/ /
Lock Exp.
/ /
Warning Sent
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Loan Amt &
425000
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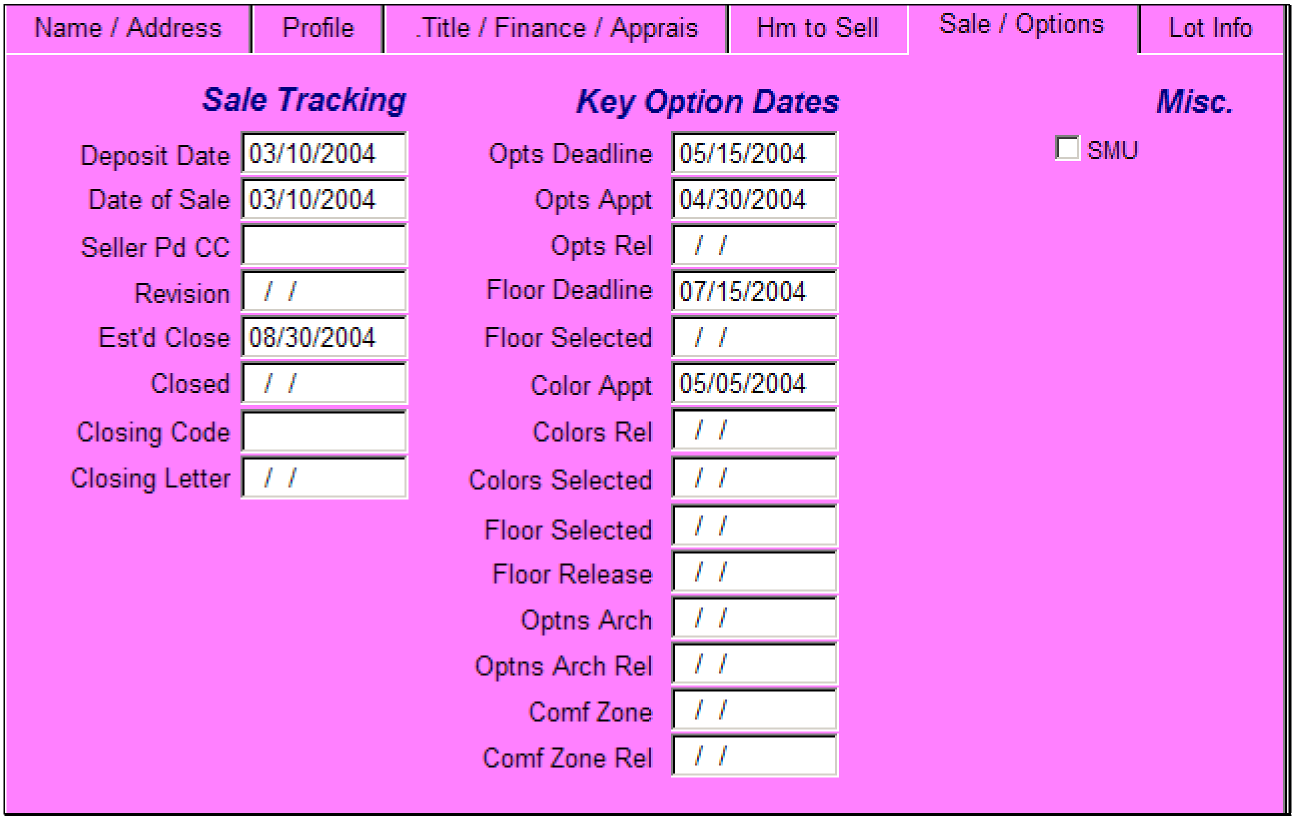
80

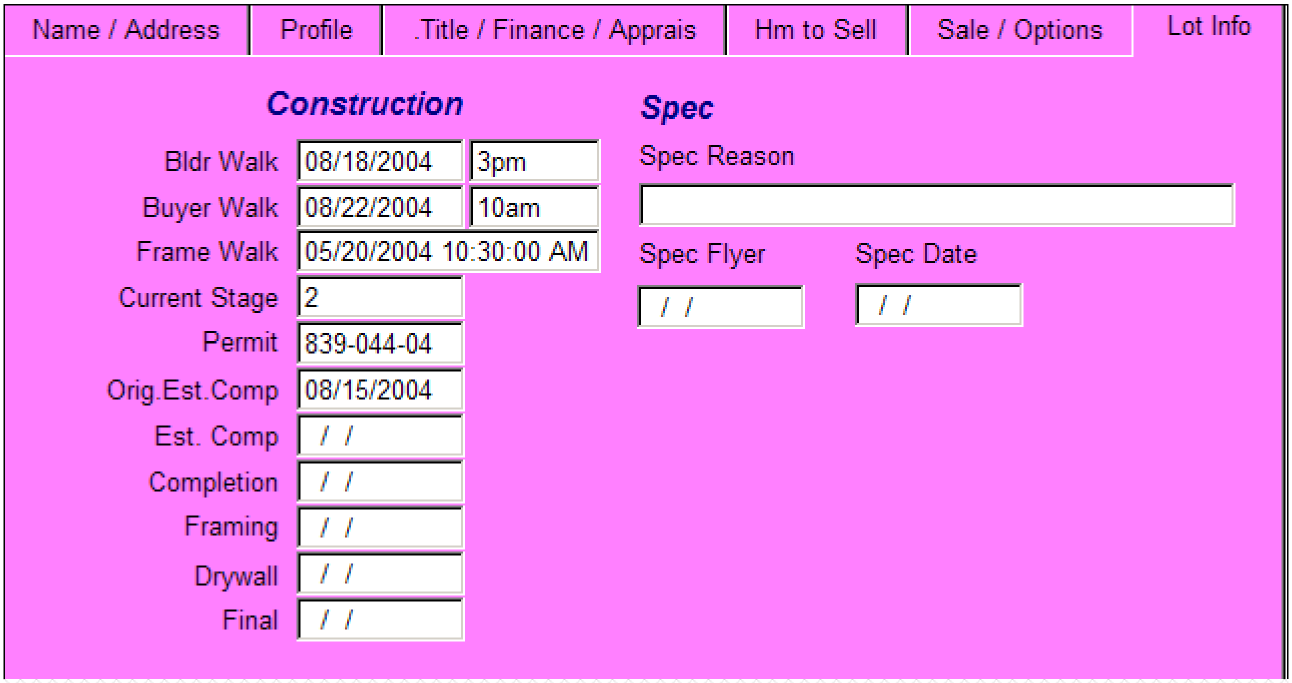
Sale / Options

This tab contains information about key appointments and dates. Use it to maintain information for the Sales, Projected Closings and Escrow Tracking Reports.



Lot Info

This tab contains information regarding construction details and key dates. Again, the data is used in a variety of Sales Tracking reports including Projected Closings and Escrow Tracking.



Chapter

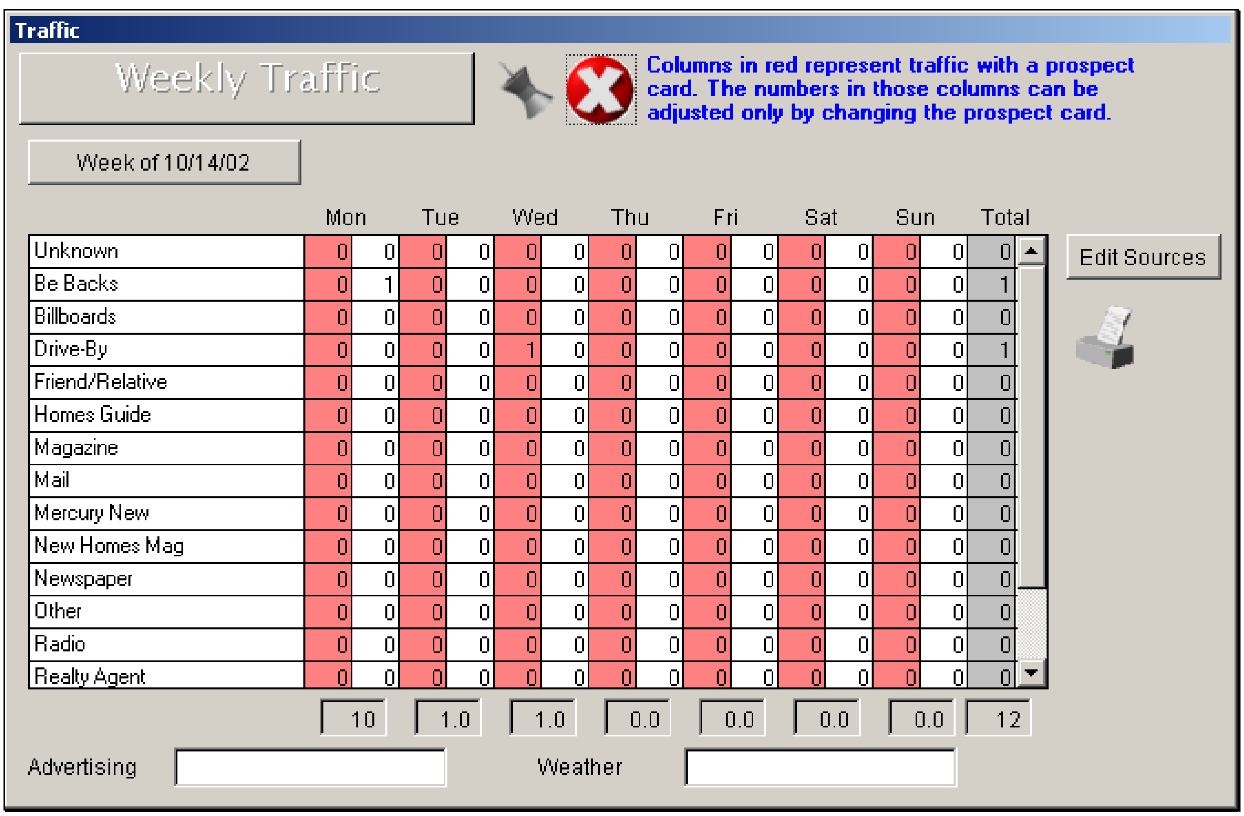
5

Traffic

The **Traffic** window provides for **Visitor** input and categorization to develop traffic statistics for marketing purposes. To open the traffic window, click the button that looks like the following:

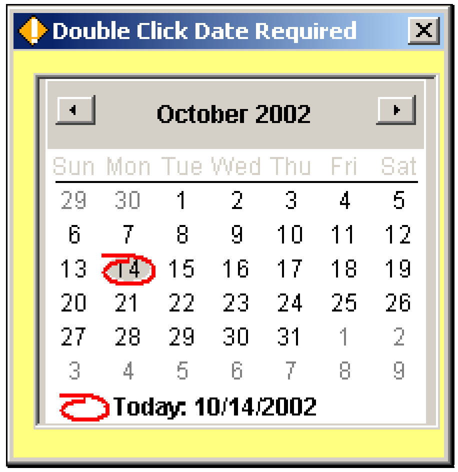
Traffic Input

Generally, most of the **Traffic** reported will be as a result of **Visitor** input. However, you are able to input additional **Traffic** "manually" – typically, people who didn't provide a registration card or when the office is too busy to input all cards on a timely basis. Here is the **Traffic** window:



Changing Report Timeframe

To change the week you are viewing, click the **Week of** button. The following dialog box appears:



To select a week, flip through the calendar and select a day from the week you wish to view by **double-clicking** on it. To flip back to the current week, click the **Today** area at the bottom of the dialog box.

To enter **Traffic**, simply input a number into the white columns reflecting the appropriate day and source. Be sure to exclude input **Visitors** from this number, as the **Traffic** statistics on **Visitors** are generated automatically.

Traffic Sources

To edit the **Visitor** sources, use **CPS Enterprise**.

Chapter

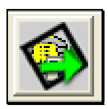
6

Follow Up

Follow Up is the process of responding to visits by interested potential buyers – as well as keeping in touch with actual buyers to advise them of construction information, closing requirements, etc. **SQLSalesBuilder's Follow-up** capabilities allows agents, designers or corporate/division staff to **Schedule** appointments, **Send** follow-up letters, e-mail, or phone calls, and **Generate** lists based on custom criteria.

Starting Follow Up

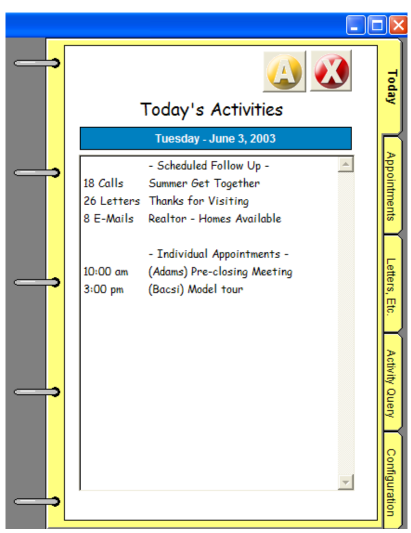
Follow Up activities are managed through the **SQLSalesBuilder Follow Up** module. Clicking on the Follow Up icon on the SQL ToolBar starts this module.



The standard SQL login screen appears. See **Chapter 2** for more information about logging on.

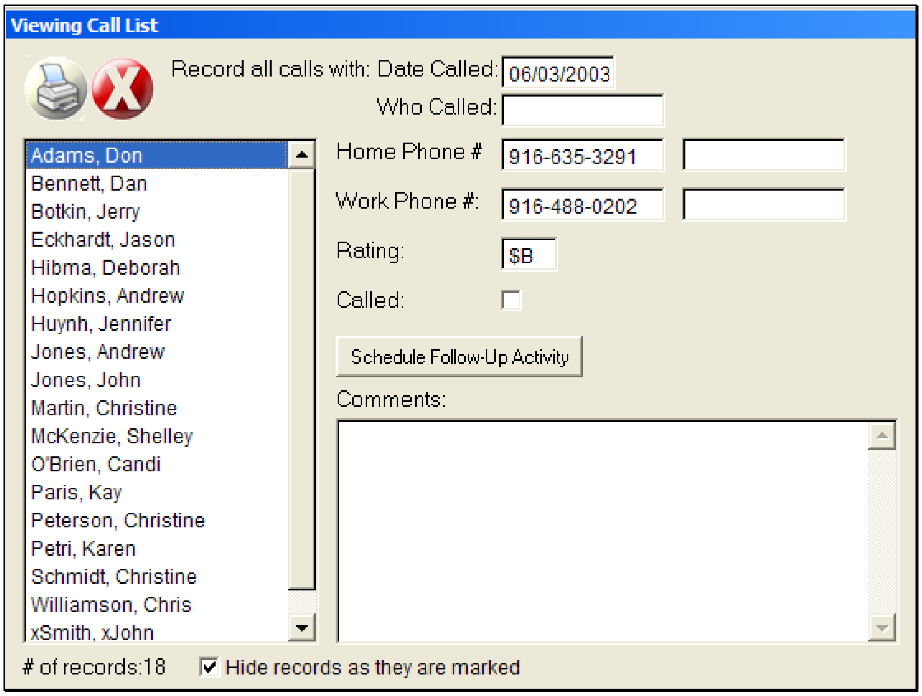
Today's Activities

After logging in, you're presented with **Today's Activities**:



Each of the activities (**Scheduled Follow Up** and **Individual Appointments**) was setup utilizing the **Follow Up** program. The user is reminded, on a daily basis, of the scheduled activities based on criteria established with the **Appointments** and **Letters** sections. The **Follow Up** format is akin to a notebook in which different functions are located on different pages. Each page is opened by **clicking** on the appropriate **Tab** on the right or left hand side.

The first page is designed to be a **Daily Reminder**. **Double-click** to view the details of a scheduled task (in this example, the **Summer Get Together Call List**):

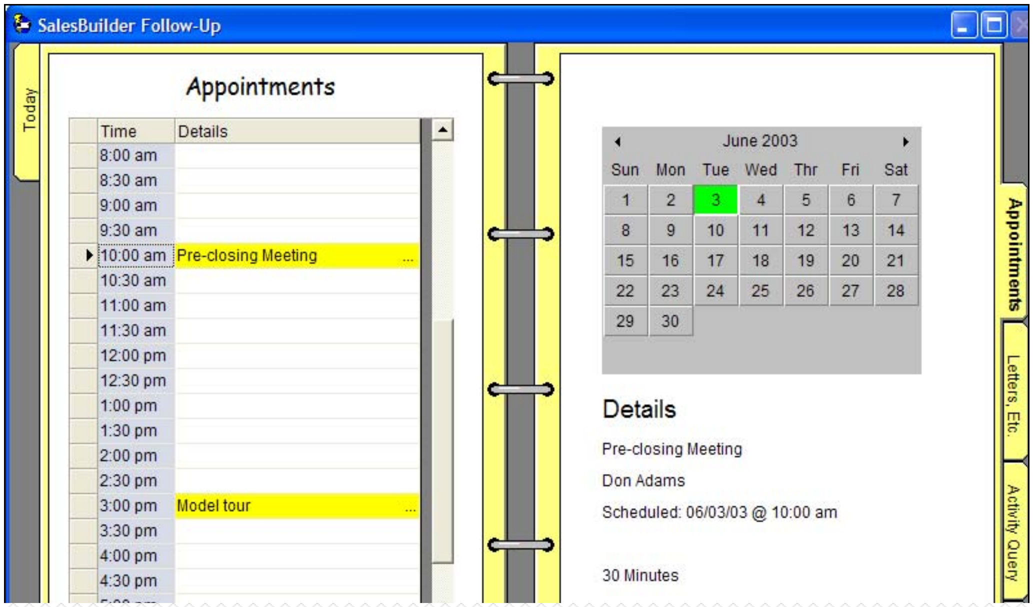


The details are available for follow up activity – in this case, the telephone numbers for calling. Additional information is provided below to indicate when an activity is completed, how to schedule additional follow-up, etc.

Initially, we'll discuss each activity – how to setup, etc.

Appointments

The **Appointments Page** is used to make, review and adjust appointments:



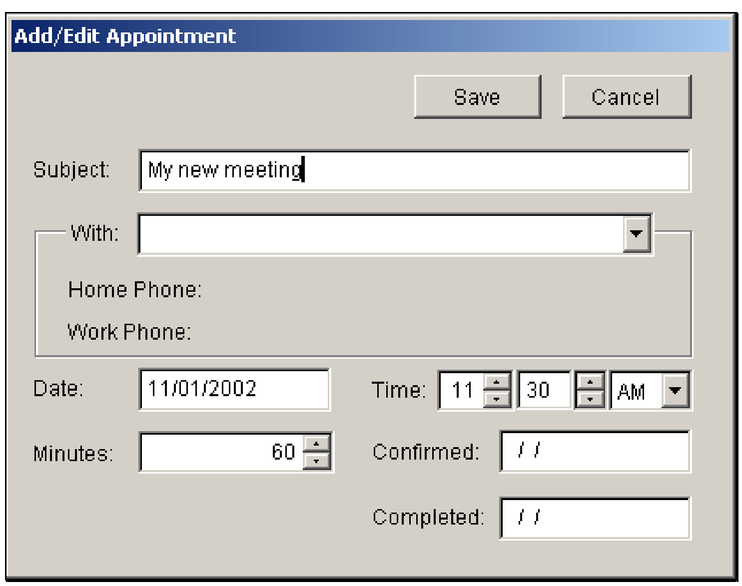
Making Appointments

To make an **Appointment**:

1) Review the calendar on the right side of the screen;

2) **Click** on the day of the month you wish to schedule the **Appointment** for on the right hand side calendar;

3) **Double-click** the time slot that you wish to schedule. The **Add/Edit Appointment** window appears:



Creating Appointment Details

Step through the **Appointment** details as follows:

- **Subject** – Description of the meeting. Visible on the **Calendar** and on **Today** screens.

- **With** – Name of person to schedule the **Appointment** with; a **drop down list** is available as a quick way to select from the **Visitors/Buyers** list – as well as other members of the builder's staff.

- **Date** – Date for the meeting; this value is automatically filled in but can be changed.

- **Time** – Time for the meeting; this value is automatically filled in but can be changed.

- **Minutes** – Estimated duration of the meeting.

- **Confirmed** – Date that meeting was confirmed (optional).

- **Completed** – Date that the **Appointment** was completed; noted in **Completed Follow Up**.

Saving Appointments

Click **Save** to save the **Appointment** details. Your new **Appointment** will appear in the **Calendar** and display on **Today's Activities** on the appropriate date.

When you click on an **Appointment** within the **Calendar**, details for it will appear on the lower-right hand side of the notebook.

Letters, E-Mail, and Phone Calls

Letters, E-Mail and Phone Calls form the critical portion of **Follow Up** for many users. **SQLSalesBuilder** allows you to establish a detailed **Follow Up Plan** for **Visitors, Buyers and Co-op Agents (Realtors)** based on criteria that <u>you establish</u>. That is, <u>you</u> can determined that you want to send a "Thank You" letter to every prospect 5 days after their visit and that every buyer receives a "Thank You For Buying" letter the day after the agreement is signed.

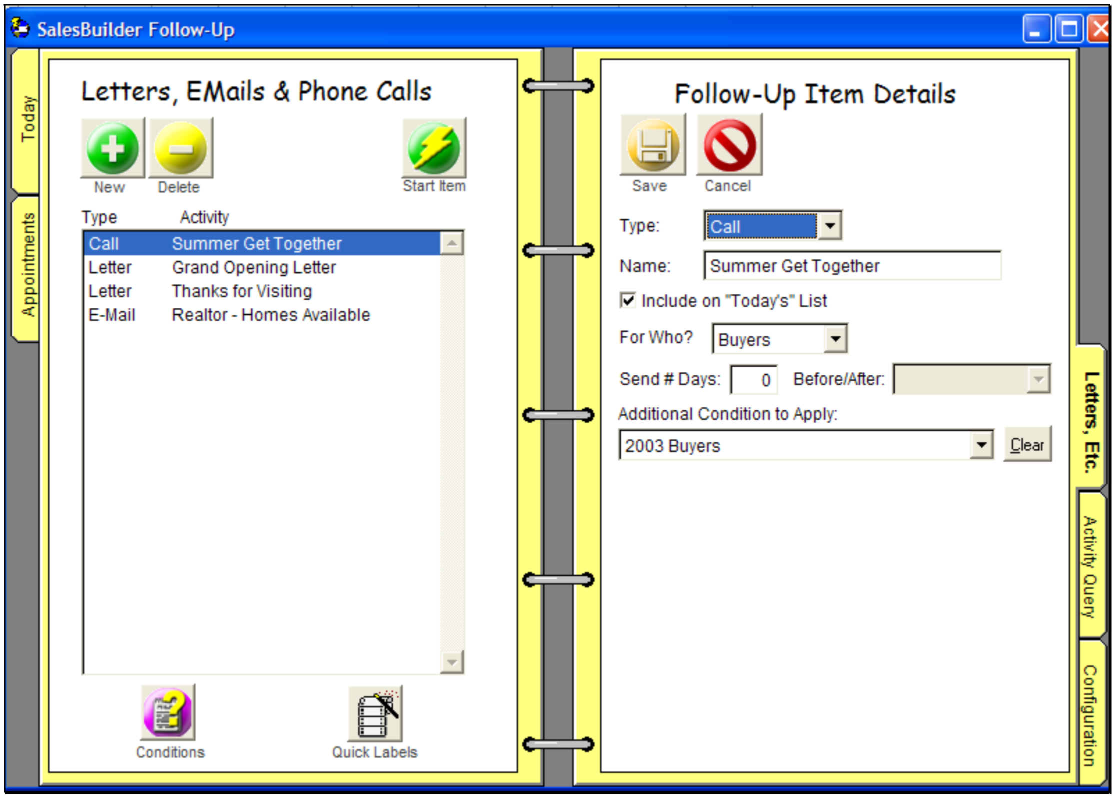
Develop a Follow-up Plan

Follow-up Plans are sales office-oriented. A **Plan** includes what activities you'd want to conduct and their schedule. For example, you may want to send out 3 scheduled letters to each **Visitor**: "Thanks for Visiting", 'Our Schools are Great' and 'What's New in the Neighborhood?" Additionally, you might want to plan to send 2 scheduled letters to **Buyers**: "Thanks for Buying" and "Your Neighborhood's Service Providers." Additionally, your **Plan** might include a monthly "Spec Homes Available" email to **Co-op Agents**. All of these activities can be scheduled by **SQLSalesBuilder** and you'll simply be **reminded** to print the letters or send the emails. Of course, you'll need to establish the text for the letters!

In order to put your **Follow-up Plan** into action, utilize the following steps.

Create a Follow-up Item

Click on the **Letters, Etc.** tab to start **Letters, E-Mail, and Phone Calls**.

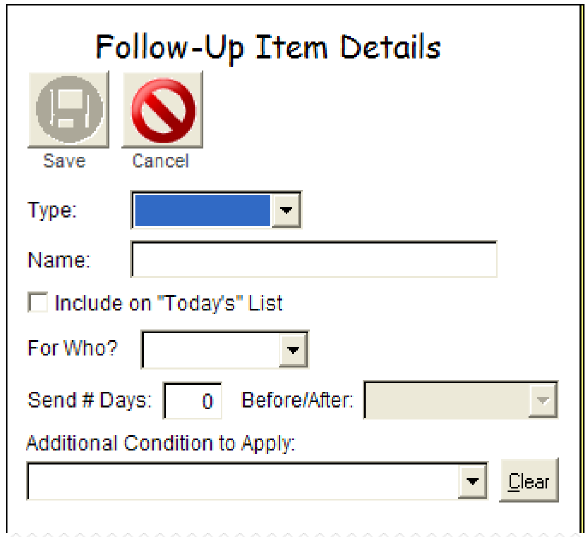


The left side of the screen displays the **Follow Up** activities that have been established previously; the right side displays the details of the highlighted activity. As you can see, the number of activities is virtually unlimited. The individual activity can be very generic or very specific (only 2003 buyers, for example, will be invited to the Summer Get Together).

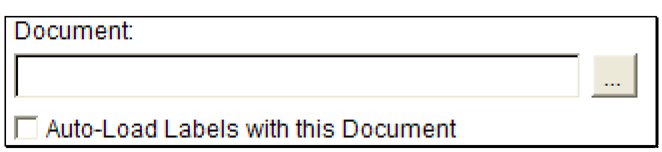
To create a new follow-up item, click on the **ToolBar**:

Define Follow-up Details

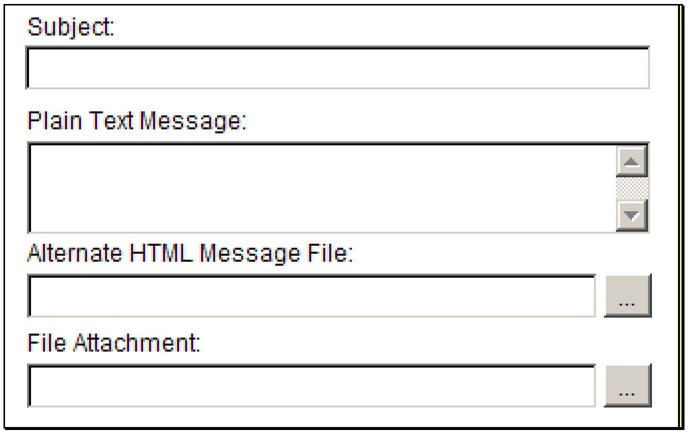
A blank **Follow Up Item Details** screen appears on the <u>right-hand</u> page. You're ready to start specifying the **Type** (Letter, Email or Phone Call) of **Follow Up**:



- **Type** – Type of follow-up item; drop down window displays **Letter, Call, E-mail**;
- **Name** – Your descriptive title (displays on **Today's Activities, Letters, Emails and Calls list** and **Reports**);
- 

 – Determines whether or not this activity will appear as a daily activity (vs. when you wish to perform the activity (e.g., a "Thank you "letter goes out daily on a regularly scheduled basis vs. "Grand Opening Invitation" goes out once);
- **For Who?** – Type of **SQLSalesBuilder** recipient; drop down window displays **Buyers, Visitors, Realtors**;
- **Send # Days** – Number of days before/after designated activity to apply follow-up item
- **Before/After** – Determines whether item should take place before visit or after designated activity;
- **Designated Activity** – Item on drop down such as **Date of Visit, Date of Sale**, etc. The last 3 items are combined to establish a "trigger" such as **2 days After Visit Date**);
- **Additional Condition to Apply** – **Filter** to apply to **For Whom?** This feature allows you to narrow the entire group of names to meet criteria such as: "only A prospects", or " 2003 Buyers", etc. See **Conditions List** below for more information.
- 

Document and **Auto-Load** apply only if **Letters** was selected so you're able to indicate the specific Word document file to use and whether or not Labels should be automatically created.



- There are 2 Follow-up Email options:

  - **Subject/Plain Text Message:** This option provides for a simple, mass email message such as "New Release Available Saturday" as the **Subject** and "Office opens at 9am; refreshments available" as the **Plain Text Message**. Of course, the Text can be much more involved and longer. A **File Attachment** can be associated with this email; specify the file location here.

  - **Subject/Alternate HTML Message File/File: Follow-up** also provides for **HTML messaging (**the "text" of the email contains a file). This feature allows you to incorporate a picture, logo, etc. within the message. This capability is sometimes referred to as "blast emailing."

Once all fields are complete, click **Save** to save this **Follow Up Item** and add it to the **Letters, Emails and Calls** list

The new **Follow Up Item** will be added to the list on the left side of the screen.

Changing/Deleting Follow-up Items

Once added, you can make changes by highlighting it and modifying the **Item Details**; to remove, highlight it and click **Delete**:

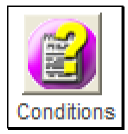
Creating Follow-up Conditions (or Filters)

Use **SQLSalesBuilder** to target market and have more control over exactly which **Visitors, Buyers or Realtors** receive your **Follow Up Item** by using a **Condition** to filter (or reduce) the list to only those meeting specific criteria.

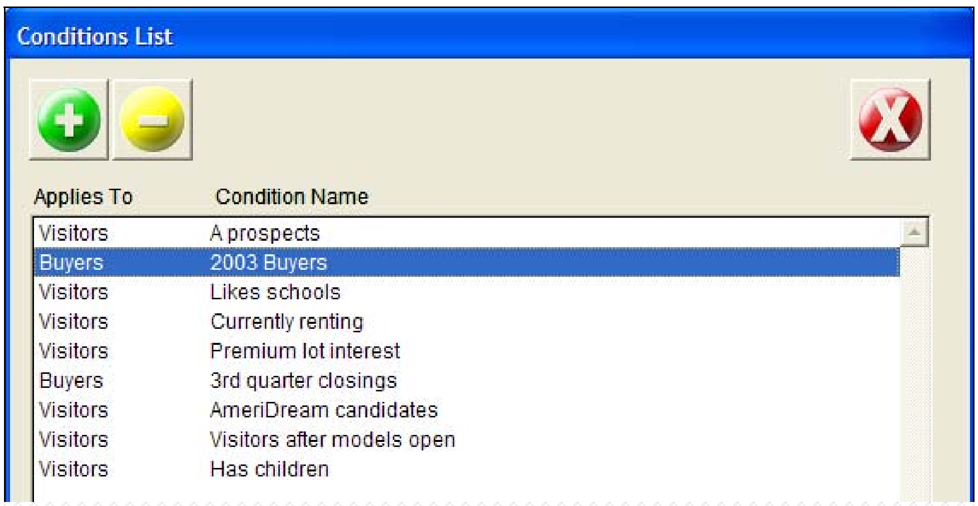
Conditions consist of a series of logical statements called sentences based on information you have collected about your **Visitors, Buyers or Realtors.** For example, one condition may be to include only "**A**" rated **Visitors.** – or it could be much more detailed (e.g., only "**A**" rated **Visitors** who indicated an interest in **Plan 3**). You're able to mix and match responses and details from information collected any way you wish.

Create a Condition

To create a condition, click the **Conditions** button:



The **Conditions List** window appears:

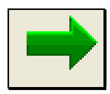


The list displays all currently established conditions. **Apply** a condition by **double-clicking** it and adding it to the **Follow Up Item**. Or, create a new **condition** ("B" prospects, in this example) by clicking the **Add** button:

Using the Condition Wizard

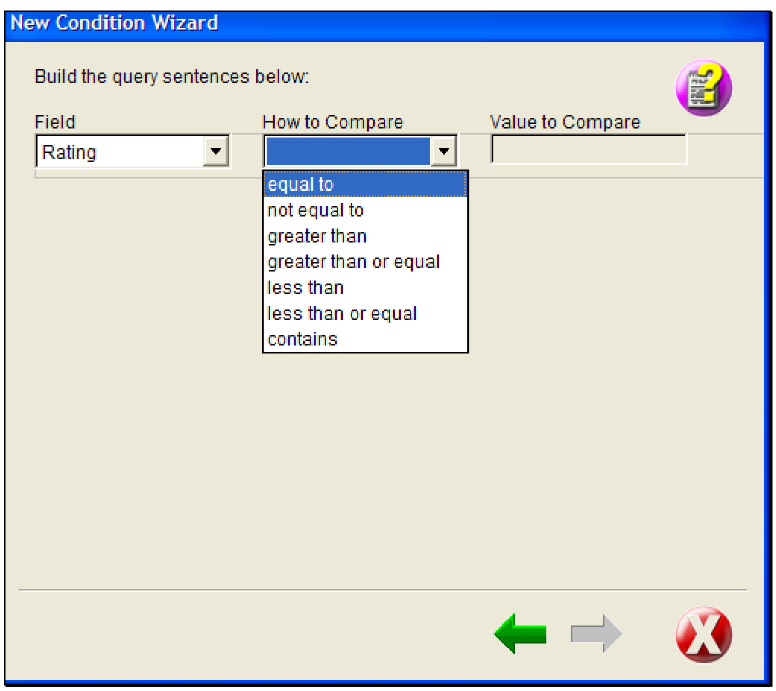
The **Condition Wizard** appears to step your through the process:

Select the type (**Visitors, Buyers, Realtors**) this condition will apply to (e.g., **Buyers**) and click the Continue button:



Developing a Query Sentence

The next page is the query sentences page. This is where we will build our logical statement:

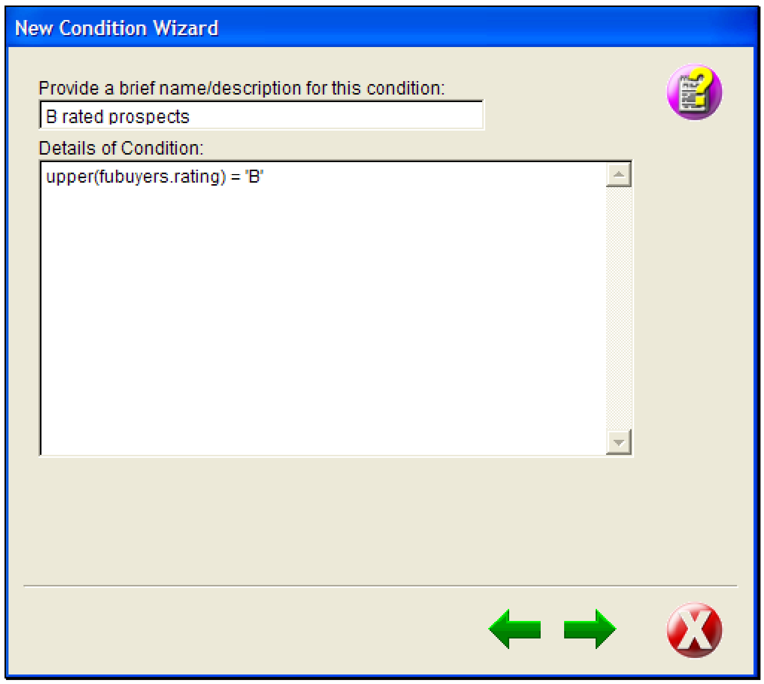


Because we want only **Visitors** with a "**B**" rating, we'll select **Field (Rating)** and **How to Compare = equal to.** If we wanted "A" or "B" rated Visitors, we could select "**less than**", etc. The last step is to type the **Value to Compare** as "**B**".

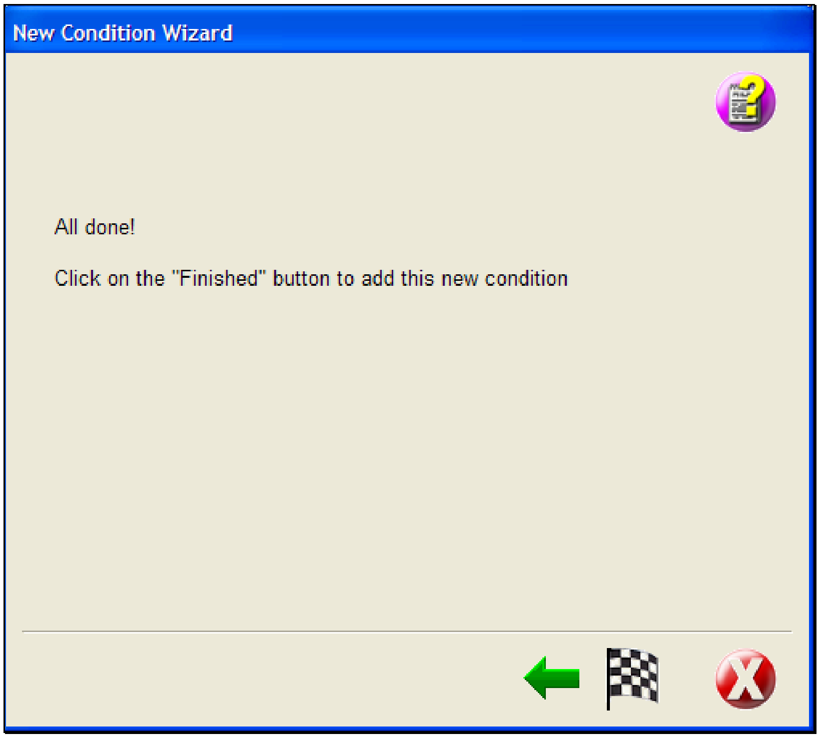
If we wanted to create a compound **Condition** (a **Condition** with multiple query sentences) we would select **And/Or** from the small box below and continue making logical statements. A compound **Condition** would be "All A rated Visitors with a Visit Date after 05/01/2004."

Establishing "English" Condition Descriptions

The next page is the **Description**, which provides a quick and easy identifier (vs. the logical statement). Type in a brief "English" description for the new **Condition.** (it appears on the **Conditions List**). Click the **Continue** button.



We're finished! Click the **Checkered Flag** button to close the **Wizard** and **Save** our condition.



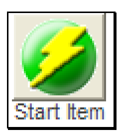
The condition will appear in the **Conditions List** and be available for selection on Fo**llow Up Items**.

Non-Scheduled Follow Up

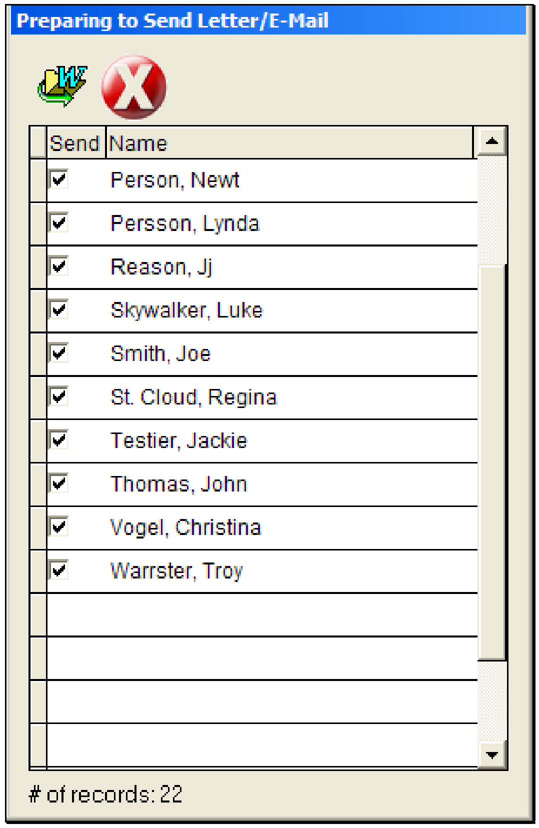
Remember the "Grand Opening Invitation"? It is considered a **Non-Scheduled Follow Up Item** because it doesn't need to be done on a regular basis – however, you want to include it in your **Follow Up,** send it to **Visitors** and have it appear on **Reports**, as well.

Start a Non-Scheduled Item

Once you are ready to begin, highlight the desired item and select **Start Item on the Letters, Emails & PhoneCalls ToolBar:**



Depending on the **Follow Up Item**, you'll be presented with either a **Call** or **Letter** list and you're able to begin:



Labels

Although **Mailing Labels** may be printed as a part of a **Letter Follow Up Item**, **SQLSalesBuilder** provides the ability to print Labels independently. You don't need to know anything about how to create a mail merge letter or label – it is handled for you!

Quick Labels

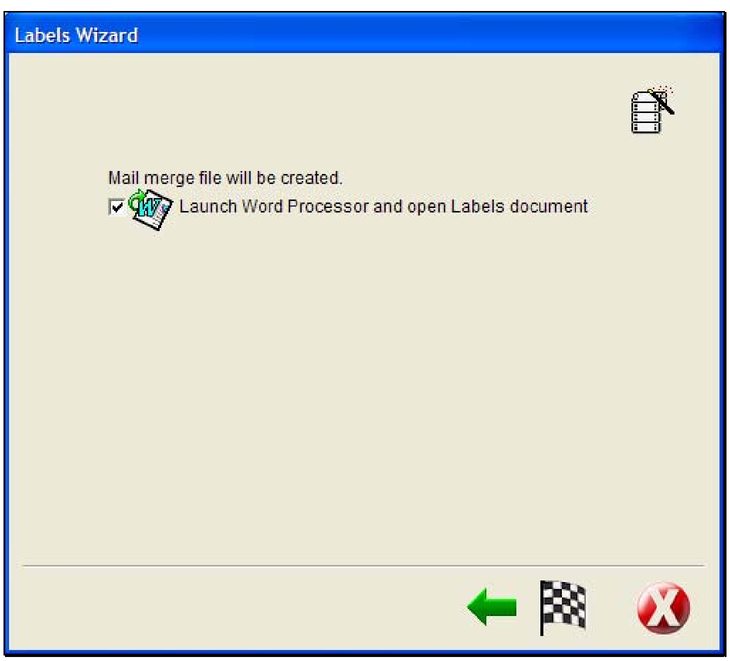
To print **Labels**, click on the **Quick Labels** button:

Then, follow the steps of the **Labels Wizard** (MS Word required, of course):

Apply a Condition

Once again, you may wish to narrow (or filter) your recipient list. Perhaps you have a pre-printed flyer announcing a New Release but..you don't want to send it to everyone who has visited your sales office – just those visiting since 1/1/2004. Check if such a **Condition** is available; if not, establish it as described above. Once the **Condition** is available, make your selection; then click the **Continue** button.

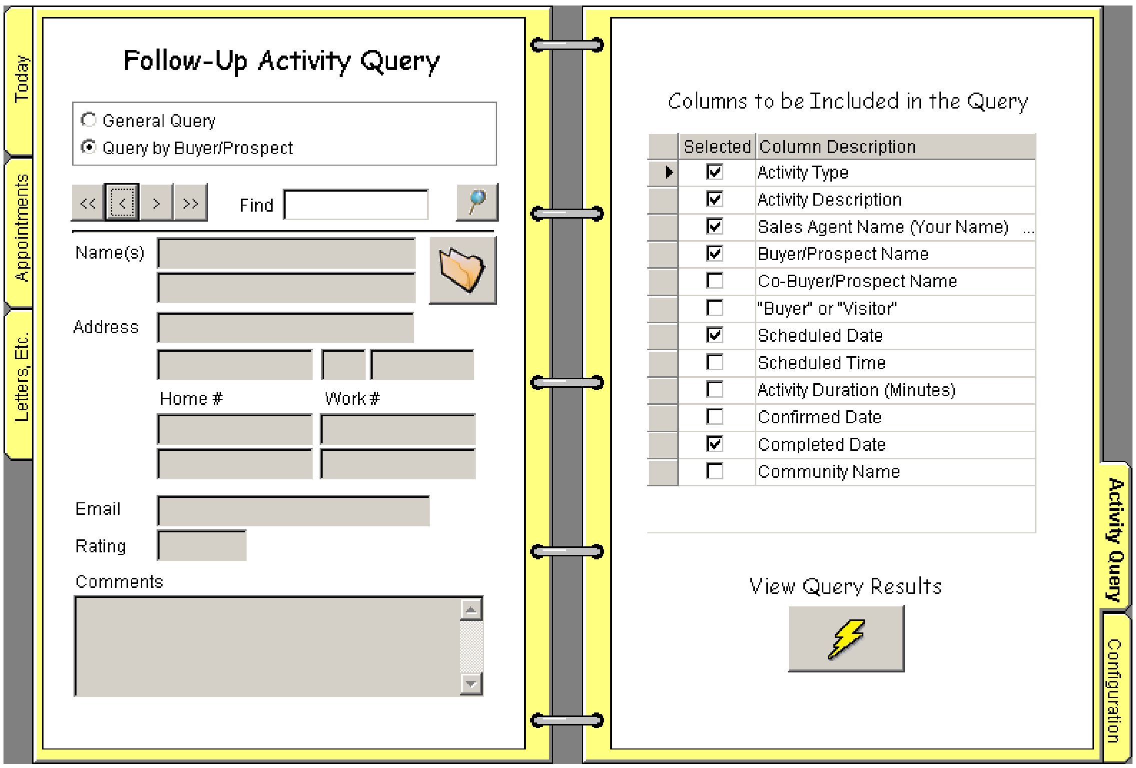
Print Labels



You are now at the last page; make sure that the **Launch Word Processor** checkbox is checked, and click the **Checkered Flag**. Word will open (if you have it installed) and you're ready to print the selected **Labels**!

Activity Query

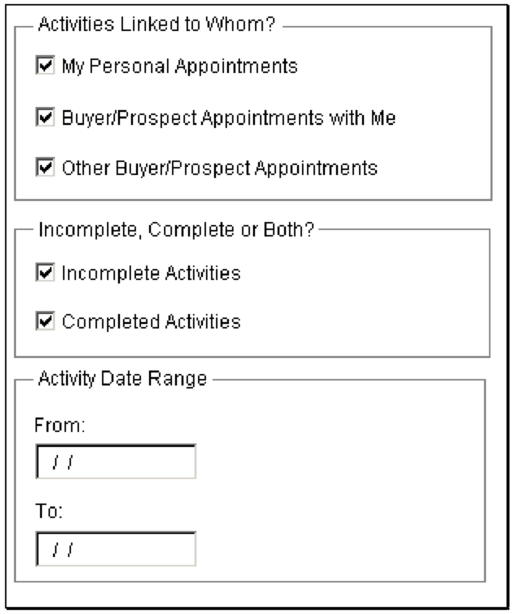
The **Follow up Query** is designed to allow you to gather any set of information about people into a report. The **Query** allows you to decide exactly which people, as well as which pieces of information about them you wish to view. To access the query, click the **Activity Query** tab:



You can generate a **Query** by specific **Buyer/Visitors**, or a general query encompassing all buyers and visitors. To select which type of **Query** you prefer, **click** on the appropriate option in the option box on the upper left side of the notebook:

General Query

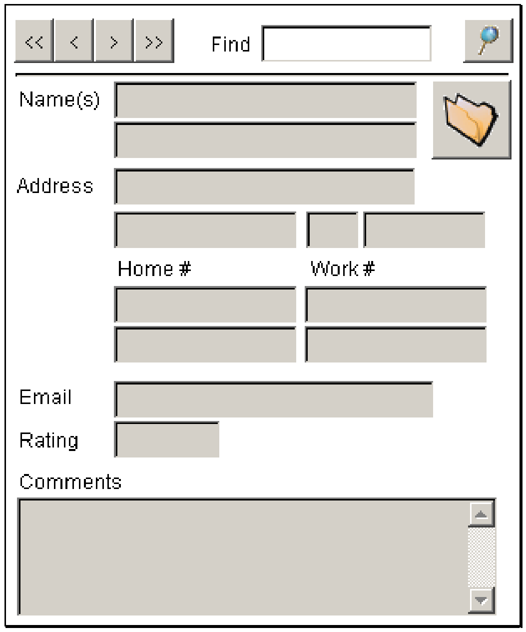
If you select **General Query**, you will be presented with the following options:



- Activities linked to whom – determines which people to include in the **Query:**
    - **My Personal Appointments** – Any person having an up-coming *personal* appointment.
    - **Buyer/Prospect Appointments** – Any buyer or visitor having an up-coming appointment.
    - **Other Buyer/Prospect Appointments** – Any other buyer/visitor appointments.
- **Incomplete, Complete, or Both** – Determines whether or not to include people involved in either incomplete or complete activities
- **Activity Date Range** – Date range of the activities with which to include associated people

Query by Prospect/Visitor

The **Query** by prospect/visitor allows you to generate a report including focused on a specific individual:



To select the person you wish, you can either browse through your person list by using the arrow buttons, find the person you wish using the find function, or lookup the person using a list.

To browse using buttons, click the right and left single arrows to move forward or backwards through the list of people. Click the double right or left arrows to move to the beginning or end of the list.

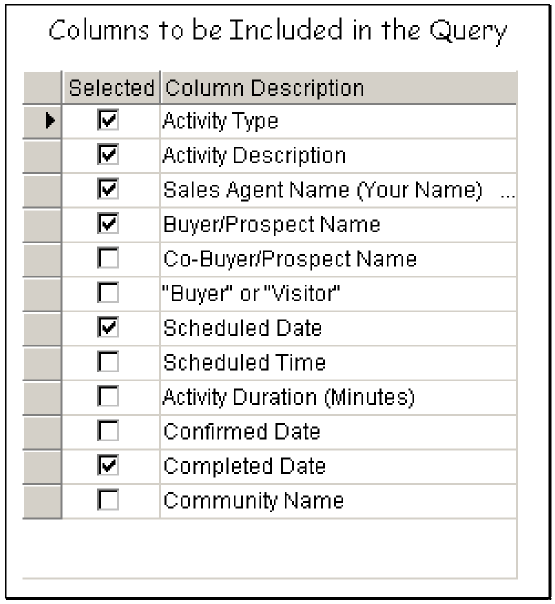
To use the find function, type the person's name into the find box. The program will attempt to load up the person whose name most closely matches what you have typed in.

If you still cannot find who you want, you can use the lookup window. Click the lookup button () then select the person's name from the list that pops up.

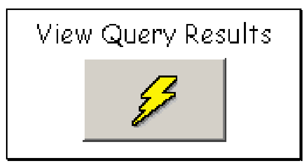
Once you have loaded up a person, you may edit any of the fields on the screen. Be sure to click the save button once you are finished, or changes will be lost:

Query Columns

Each column in the query is a particular piece of information about the people or person you have selected. To decide which pieces of information you are interested in, simply check off each one in the list on the right-hand page:



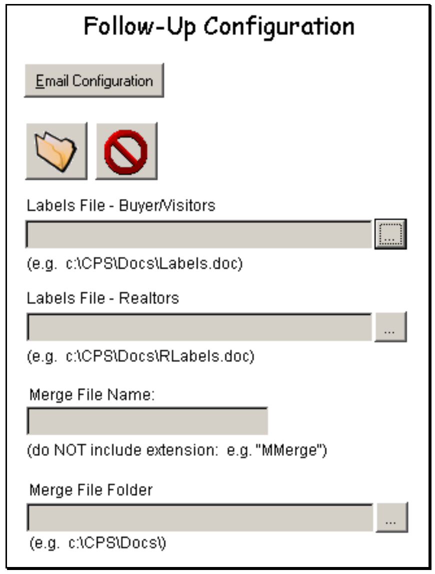
Once you have made your selections, begin the **Query** by clicking the 'View Query Results' button:



Configuration

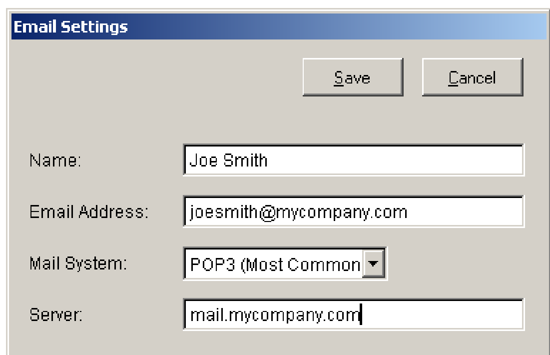
Follow Up Settings

The **Configuration** page is the portion of the program that allows you to specify various options – such as your email address, labels document file name, etc. To access it, click the **Configuration** tab:



Setting Details

- **E-Mail Configuration** – use this function to set up your personal e-mail settings. Clicking on this button will reveal the following window:



  - **Name** – Your name
  - **E-mail address** – your e-mail address (for reply's)
  - **Mail System** – The type of email system you use ("pop3" is most common)
  - **Server** (only appears once you have selected mail system) – The Internet name for your e-mail server (see your network administrator).

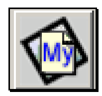
- **Labels Files** – Path to the .doc files containing your labels for either buyer/visitors, or realtors.

- **Merge File** – Path and filename that you wish the program to output its merge file. This file will be used as a temporary output location between the follow-up program, and your word processor. If you ever have problems in the future, you can check this location to be sure that the program is outputting to the proper location.

Chapter
7

Reports

As with **Follow-up**, **SQLSalesBuilder Reports** are available using a module called **My Reports**. To launch **My Reports**, click on the **My Reports** icon on the **SQLSalesBuilder ToolBar**:

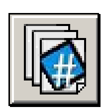


You are presented with the standard **SQLSalesBuilder** login screen. See **Chapter 2** for more information about logging on. The **Reports** module opens:

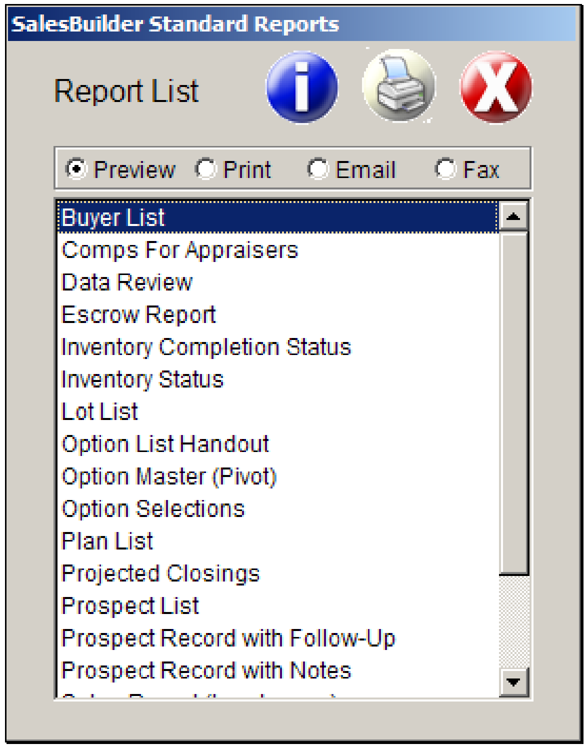
SalesBuilder Standard Reports

Begin Standard Reports

SQLSalesBuilder provides a wide variety of **Standard Reports** available to all users. To access the **Standard Reports**, click the button:



You will be presented with a **Standard Report** list similar to the following:

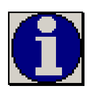


Selecting and Printing a Standard Report

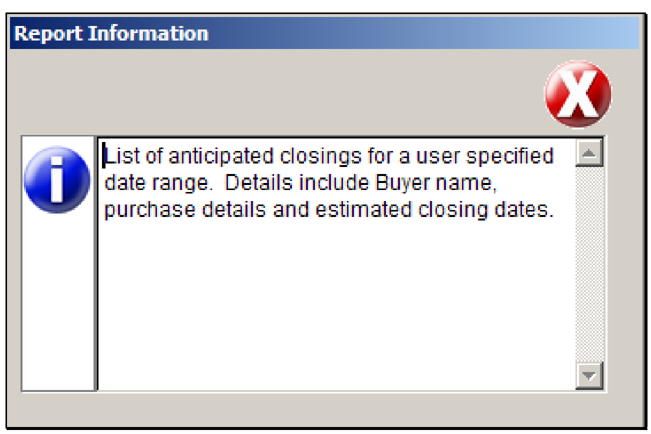
1.) **Select** the report from the list.

2.) Determine your **Preferred Output** method (**Preview, Print to Printer, Email or Fax**). You're able to Preview the report on the screen, print the report to your printer, and e-mail or fax the report to a desired recipient.

3.) To **View Information** (a description of the report, required or optional user interaction, etc.), **click** the **Information** button:



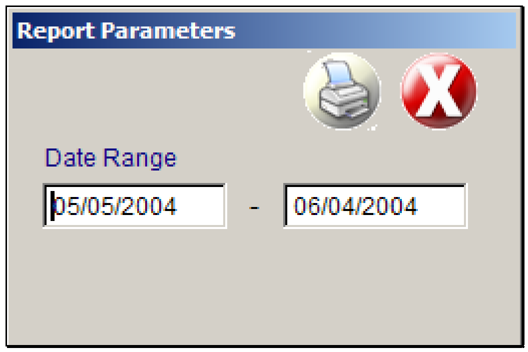
Report Information displays (in this case, about Projected Closings):



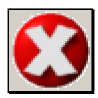
4.) Finally, to generate the report, click the **Print** button:

Establishing Report Parameters

At this point, you may be asked to specify **Report Parameters** such as date ranges, etc. (based upon the report details described above). Enter the appropriate responses and click the **Print** button to continue.



When you are finished, click close:



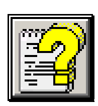
My Reports

My Reports allows a user to create custom-designed reports. What makes this feature particularly useful is the ability to output custom reports in *several different file formats* -- including an Excel spreadsheet. To create the report, you must first create **Conditions** specifying dictate which pieces of information you wish to include.

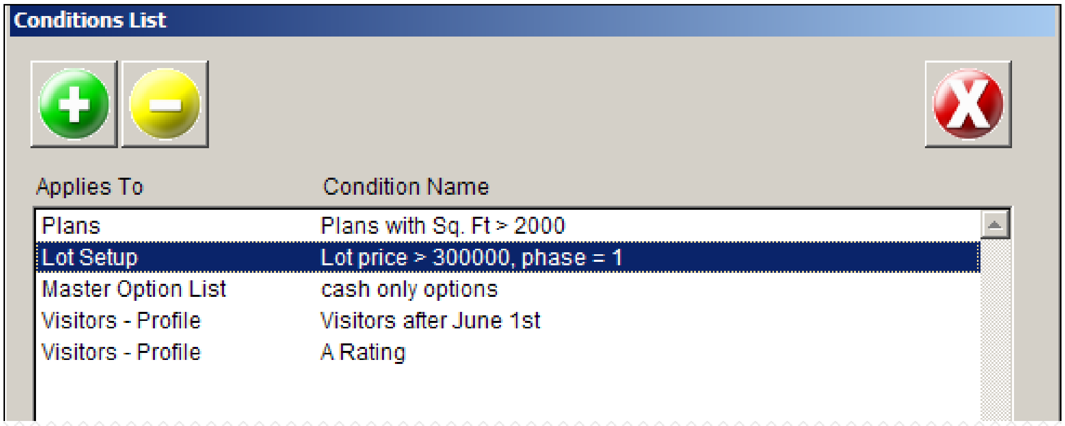
Conditions

Conditions consist of a series of logical statements, called sentences, which act as filters. For example, one **Condition** may be to show all lots with a base price greater than $300,000. A **Compound Condition** may be all homes with a base price over $300,000 sold during the month of May 2004.

To build Conditions, click on the button:

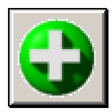


The **Conditions List** window appears:



Add a Condition

To **Add** a new **Condition**, click the add button:



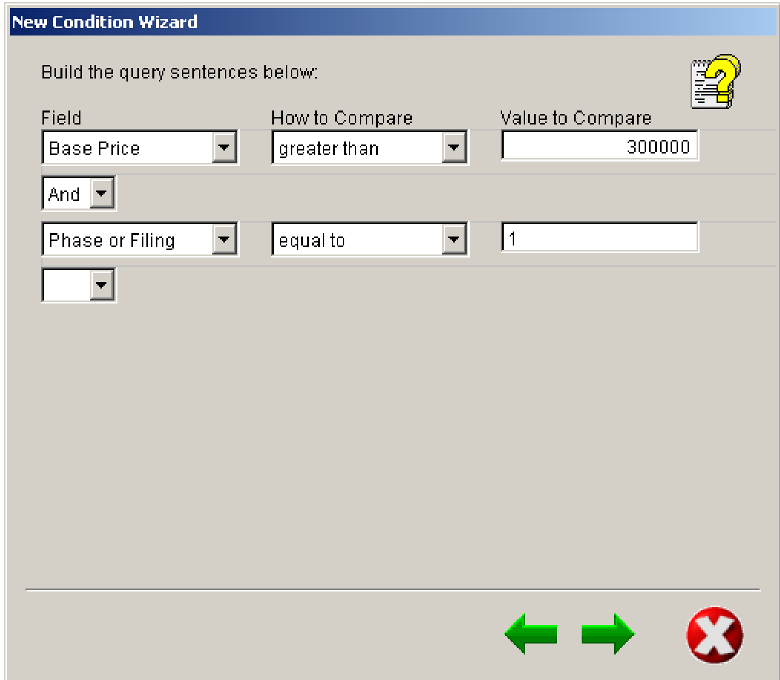
Condition Wizard

The condition builder wizard will appear:

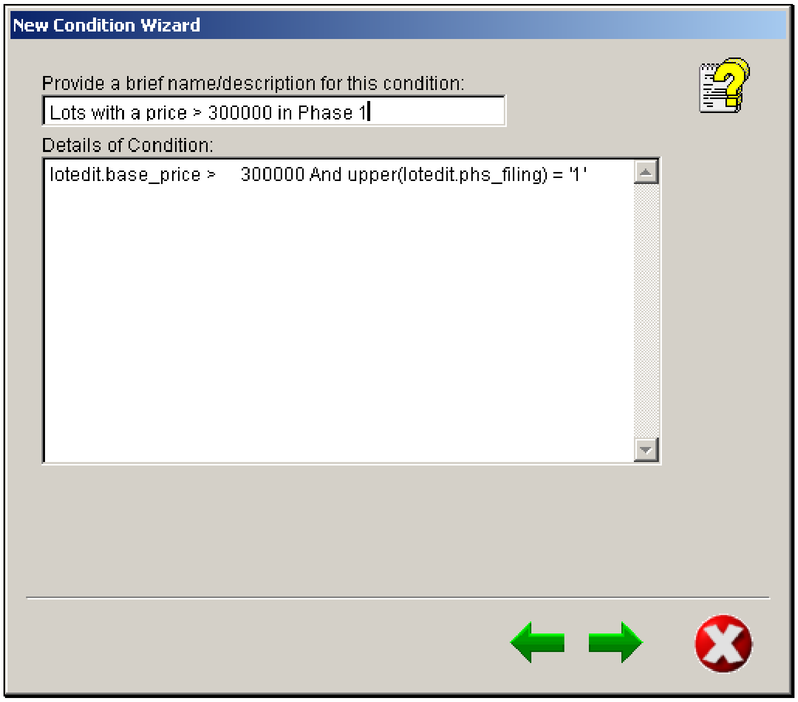
Determine the type of information you'd like to include in the report and highlight your selection. For our example, we'll use **Lot Setup**. Click the green **Continue** button when finished.

Query Sentences

This is where we will build our logical statement:

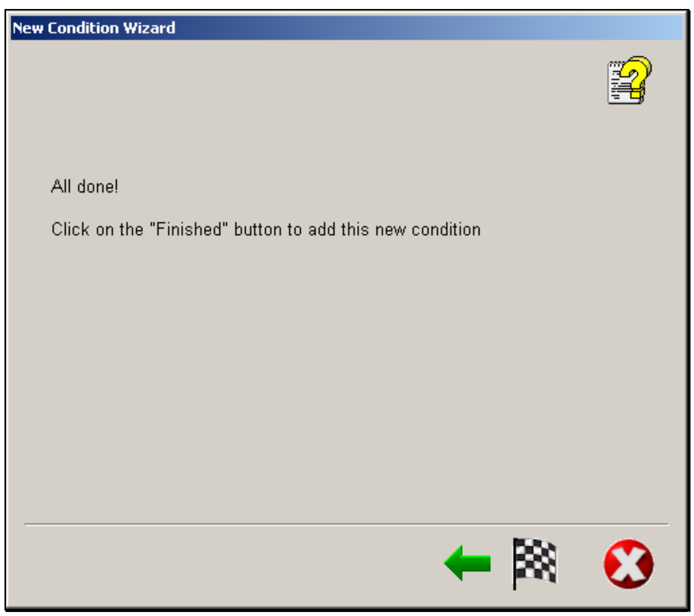


Make selections based upon the Fields you've determined to use. For example, we will create and select two sentences. First, we **drop down** the **Field List** and select a **Base Price** greater than 300,000. Then, we flip the small pop-down list below to "**And**". This causes a new "sentence" line to appear within the window. In the second sentence, we dropdown the **Field List** and select **Phase or Filing** equal to 1. We won't create any additional filters or select any other "And" or "Or" statements. Click the green **Continue** button.



Determining Condition Name

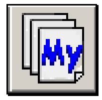
The next step is creating a **Description** for the **Condition**. Type in a brief "English" description that will help you remember what the condition means. Click the green Continue button.



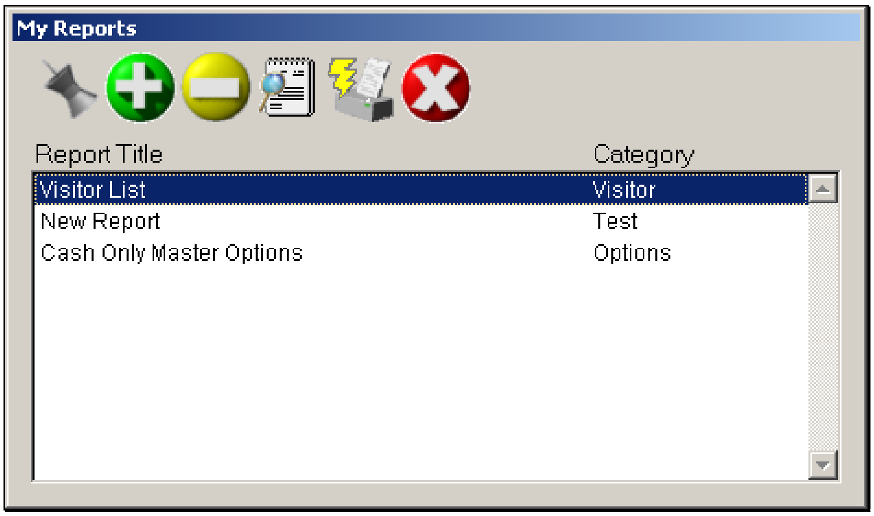
We're finished! Click the **Checkered Flag** to close.

The new **Condition** will appear in the **Conditions List** and be available for selection.

Now that we have a **Condition** built, let's **Print** a report based on it. Remember, if you haven't created any **Condition**, **My Reports** will generate information for the entire database – generally, you will want to filter via a **Condition**. Click on the **My Reports** button:

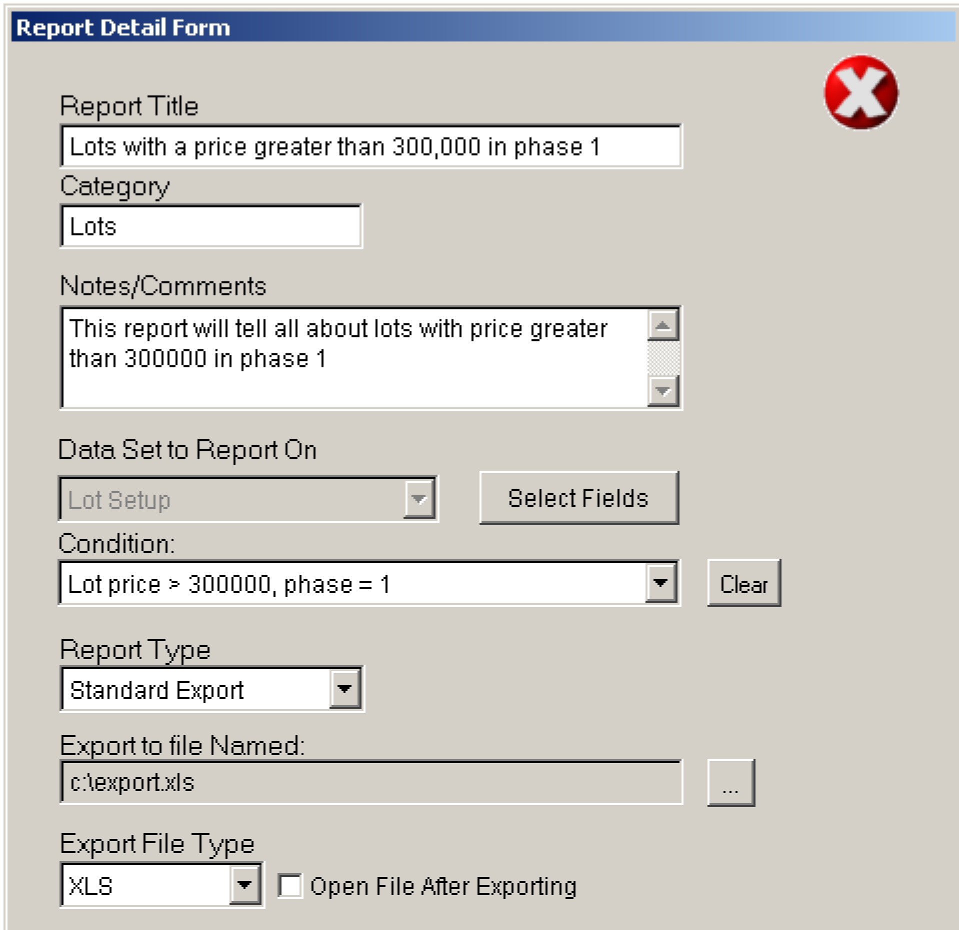


The **My Reports** window appears:



Click on the **Add** button to add a new report:

The **New Report Input Screen** appears:

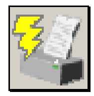


- **Report Title** – Description which will appear in the "My Reports" list
- **Category** – Category descriptor. Optional.
- **Notes / Comments** – Notes about the report. Optional.
- **Data Set to Report On** – Type of information you wish to report on.
- **Condition** – A condition used to narrow the amount of data output by the report. If left blank, all records of the type selected will output.
- **Report Type** – Type of output format. Choices are Standard Export (File), VFP Report (Visual FoxPro Report), or Word Fill (Word Doc Output).
- **Export to file Named**– Desired path and filename of output file
- **Export File Type** – Format of file. Only appears when Standard Export is selected as Report Type.
- Open File After Exporting – Check this box if you wish to open the file after exporting. Otherwise you will need to open the file manually.

Click the **Close** button to save the report:

Printing Report

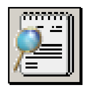
Click the **print** button to generate the report:



The previously set **Options** determine **Output** and **Format** (see above).

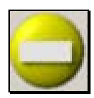
Editing Reports

To make changes to your report, select it from the list and click the **Edit** button:



Deleting Reports

To delete an unwanted report, select it from the list and click the **Remove** button:



Close My Reports

To close the **My Reports** window or the **Reports** module, click the **Close** button: