



Content order of each day subject to change, updated agendas and slide deck for notetaking will be distributed to attendees prior to the session

MONDAY

7pm-9pm Welcome Reception at Wild Horse Pass Hotel and Casino (Exact location TBD)

TUESDAY

8:30am Start Time

- Introductions
- Basic Overview of Sales Simplicity
- Builder Setup
- Users
- Division Setup
- Subdivision Setup
 - Info Settings and Permissions
- Quick Traffic
- Subdivision Phases
- Field Labels and Data Codes
- Stages of Construction
- Stages of Escrow
- Customer Transfer



WEDNESDAY

9:00am Start Time

- Builder-Master Reports
- FTP Overview
- Types of Reports
 - Word
 - Crystal Reports
- Macro instructions for Word contracts and letters
- Contracts and Customer Reports (“Preview” contracts)
 - FTP to Master Reports to Division level to Subdivision level
- Follow Up Task-Admin level
- Wonderwall Setup
- Code Generator
- Workflow-Builder, Division, Subdivision, and User levels
- Email Creation Utility-Workflow and eLead auto responses
- Division Realtors and Companies
- Division Mortgages and Lenders

7pm University Dinner-Attendees and Sales Simplicity Employees

THURSDAY

9:00am Start Time

- Excel Imports
- Floor Plans
 - Master Plans
 - Phase Plans
- Options
 - Master Options
 - Plan Options
- Lots
- Lot/Plan Matrix
- Option Rules
- Builder-Attributes
- Spec Homes



- Commissions
- Reports-Builder, Division, Subdivision, Agent level

FRIDAY

9:00am Start Time

- Customer Section
 - Search
 - Buyer
 - Co Buyer
 - Demographics
 - Notes
 - Lots and Plans
 - Options
 - Mortgages
 - Rent Vs Buy
 - Deposits
 - Stipulations
 - Contracts
 - Customer Reports
 - Departments
- FollowUp
 - CRM Suite
 - Customer Marketing
 - Wonderwall
 - Dashboard

AFTERNOON OPTIONAL SESSION-BUILDERMT INTEGRATION/OVERVIEW

1:30pm-4pm

- Integration Configuration
- Sales Pricing Module
 - Plan Types, Option Types, Categories, and Cutoffs
 - Master Models and Options
 - Models and Options by Community
 - Worksheets
 - Sending to Sales Simplicity
 - Retrieving from Sales Simplicity