

Construction CRM Software Product Comparison

Easily Upgradable and Affordable - Our products grow with your company.

CSG's CRM Software Modules Available

Simple SalesBuilder *SalesBuilder* *SalesBuilder* *Cloud*
SalesBuilder *Plus* *Professional* Series

	<i>Simple</i> SalesBuilder	<i>SalesBuilder</i> <i>Plus</i>	<i>SalesBuilder</i> <i>Professional</i>	<i>Cloud</i> Series
Prospect Management and Follow-up Marketing	✓	✓	✓	✓
Build a Home/Finance Contracts		✓	✓	✓
Buyer/Contract Management		✓	✓	✓
Customer Service/Warranty Tracking		✓	✓	✓
Sales Management		✓	✓	✓

Prospect Management Features

Tracks Prospects/Clients from Initial Contact to "Contract"	✓	✓	✓	✓
Tracks Multiple Job Opportunities Per Prospect/Client	✓	✓	✓	✓
Attach Notes, Pictures and Documents to Both Prospects/Clients and Job Opportunities	✓	✓	✓	✓
Allows Set Up of Pre-Selected Drip Marketing Plans of Calls, Meetings, Letters, E-mails and Tasks	✓	✓	✓	✓
Mail Merge - Allows Creation of Standard E-mails, Contracts and/or Letters	✓	✓	✓	✓
Shared Calendar - Schedules Calls and Meetings.	✓	✓	✓	✓
Tracks Traffic per Sales Center/Office	✓	✓	✓	✓
Integrates to Microsoft Outlook to store client and job e-mail history	New	New	New	New

Contract Finance Features

Creates and Prints Sales Agreements from Pre-setup Lots, Models/Floor Plans and Options		✓	✓	✓
Ability to View Pictures of Models and Options when Building a Home and Change Orders		✓	✓	✓
Allows the Ability to Add Custom Options on the Fly		✓	✓	✓
Ability to Add Lots and Models/Floor Plans on the Fly		New		New
Allows Salespeople to Pre-Quality Buyers		✓	✓	✓
Loan Comparison Capability		✓	✓	✓
Build Homes for Inventory		✓	✓	✓
Mail Merge Build a Home Information into Preset Microsoft Word Contracts		✓	✓	✓
Handles Scatted Lots or Preset Lots by Sales Center Location		✓	✓	✓

Buyer/Contract Management Features

Handles Buyers from Contract to Completion		✓	✓	✓
Handles Multiple Contracts per Buyer		New	✓	New
Tracks Change Orders, Options, Notes, Attachments, Other Contacts, Tasks and Deposits per Contract		✓	✓	✓
Generates, Prints and Tracks Buyer's Change Orders		✓	✓	✓
Generate and Tracks Selection of Options per Contract		✓	✓	✓

Owner/Customer Module

Tracks Multiple Job Locations Per Owner		✓	✓	✓
Generates and Tracks Customer's Request for Service (Work Orders) by Owner by Location		New	✓	New
Tracks Work Orders by Owner, Location, Builder and/or by Person Responsible		✓	✓	✓
Tracks Contract Info, Options, Notes, Attachments and Other Contacts Per Job		✓	✓	✓

Sales Management Reporting

Tracks Lead Source by Sales Center/Office		✓	✓	✓
Track Sales by Sales Center/Office, Salesperson and by Job Type		✓	✓	✓
Track Tasks Completed by Date Range		✓	✓	✓

Overall CSG Features

Multi-User Capability	✓	✓	✓	✓
Integrated to Microsoft Word, Excel and Outlook to generate contracts, e-mails & reports	✓	✓	✓	✓
Accessible Remotely Via the Internet with any Mobile Device or Computer	✓	✓	✓	✓
SQL Database			✓	Optional