

Construction CRM Software Product Comparison

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

CSG's CRM Software Modules & Features Available	<i>Simple</i> SalesBuilder	SalesBuilder <i>Plus</i>	<i>SalesBuilder</i> <i>Professional</i>
CRM Modules & Web Applications			
• Prospect Management and Follow-up Marketing	✓	✓	✓
• Build a Home/Finance Contracts		✓	✓
• Buyer/Contract Management		✓	✓
• Customer Service/Warranty Tracking		✓	✓
• Sales Management		✓	✓
• CSG Central Web Portal integration (New)			✓
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	✓	✓	✓
Buyer/Contract Management Features			
• Handles Buyers from Contract to Completion		✓	✓
• Handles Multiple Contracts per Buyer		✓	✓
• 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		✓	✓
• 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		✓	✓
Contract Finance Features (Builders Only)			
• 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		✓	✓
• Allows Salespeople to Pre-Qualify 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		✓	✓
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			✓