

# Contract Process

Phase

**01**

## Building Selection

Define lot model or custom building. Use design tool to preview custom designs.

Phase

**02**

## Customer Info

Gather customer info for contract (PPB web page has an application option, or you can ask customer).

Phase

**03**

## Building Info

Ensure you've selected the correct shop, our price list is 5395, and enter in building details and custom options.

Phase

**04**

## Customer Signature

Sign in person, or have customer use the text link to review and sign contract. Alternatively, you can send PDF for digital signature if required.

Phase

**05**

## Submit Contract

Review for accuracy and submit when order is final. Sent exported contract via email to customer and copy state sales rep on email.

S BY PREMIER

The text verification code on RTO Contracts helps ensure the phone number is entered correctly before you send the 'text to sign' link to the customer.

ID	View	116689	Paid
	View	116559	Paid
	View	116526	Paid
	View	116450	Paid
	View	116316	Paid
	View	116310	Paid

## Customer Information

Reorder

Name

Customer  
Source

Note where the lead  
generated:  
Facebook  
Google  
Etc.

## Primary Address

Street Address

City

State

Zip

## Delivery Information

Same as

Ordered By

Name

Address

City

State

Zip

Directions

Make sure you enter the  
customer delivery address.

For **rent to own** (RTO) contracts  
the license must reflect this  
address, or the 2<sup>nd</sup> ID must  
reflect this address.

For **cash/cc sales**, the licenses  
doesn't have to match the  
delivery address, as the  
customer is paying in full for the  
building so there is not rental  
liability.

NOTE: For cash/cc sales you'll only need the customer NAME AND  
DELIVERY ADDRESS(ES) for this section of the contract.

## Personal Information

Cell Phone: (xxx)xxx-xxxx Verify Not Verified

Home Phone (xxx)xxx-xxxx

Work Phone (xxx)xxx-xxxx

Email

Social Sec # XXX-XX-XXXX

Date of Birth

Driver's License # Select a State

Issue Date

Own/Rent

Name of Landlord

Landlord Home Phone (xxx)xxx-xxxx

Landlord Street Address

Landlord City

Landlord State Select a State

Landlord Zip

Enter the customer cell phone number and click the VERIFY button. This will trigger a TEXT CODE to be sent to the customer. Ask the customer for the text code.

This ensures that you've entered the correct number before sending the contract TEXT TO SIGN link.

If needed, you can put a placeholder (123456789) in this field to prep the rest of the contract. Make sure you correct before submitting the contract.

NOTE: For cash/cc sales you'll only need the customer PHONE and EMAIL for this section of the contract. There is not a verify phone number process on cash/cc sales.

## Dealer Information

Regional  
Sales Rep

**DYLAN DOUGLAS**

Dealer **BAXTER BUILDINGS LLC**

Dealer Email **MICHELLE@BAXTERBUILDINGS.CO**

Salesperson **BAXTER BUILDINGS LLC**

Shop

Brochure

Select the Correct Shop

## Building Information

PO#/Contract#

**211424**

Sales Price

Enter Building List Price

Building Condition

Siding Type

Building Style

Inventory Number

Custom Siding Color

Siding Color

Upper  Lower

Custom Roof Color

Roof Color

Custom Trim Color

Trim Color

Size Width

Purchase

Type

Decline RTO Assurance

Note Trim/Roof color  
selections are not  
in the traditional order.

Select the RTO Term that the  
customer wants: 36/48/60  
months in length.

Add Metal

Cost

RTO Assurance

0.00

0.00

Rent to Own (RTO) contracts  
must have one of the RTO  
Assurance options selected

This selection will add the  
option cost for upgrading  
the siding to METAL siding.

NOTE: For cash/cc sales RTO assurance isn't required.

Option	Number of Units	Price Per Unit	Total
	0	0.00	0.00
	0	0.00	0.00
	0	0.00	0.00
	0	0.00	0.00
	0	0.00	0.00
	0	0.00	0.00
	0	0.00	0.00
<b>Dealer Discount</b>			
			0.00
<b>Total Option Cost</b>			0.00

#### Payment Calculation

Option Cost	\$ 0.00
Total (Pre-Tax)	\$ 0.00
Cost Reduction	\$ 0.00
Pre-Tax Cost Reduction	\$ 0.00
Rent to Own	\$ 0.00
Amount	
Tax Exempt	<input type="checkbox"/>
Tax Rate	5.300 %
Monthly Payment	\$ 0.00
Monthly Payment Tax	\$ 0.00
Total Monthly Payment	\$ 0.00
Security Deposit	\$ 0.00
Total Received	\$ 0.00

Enter cost reduction if customer wants to put additional funds as down payment.

Select tax rate based on customer delivery address for RTO sales.

This is the total amount owed at the time of order for this sale.

#### Term Details

	36 Months	48 Months	60 Months
Monthly Pmt			
Sales Tax			
Total Pmt			
Total Term Cost			

This chart shows the 3 payment options for the terms available.

NOTE: Cost reductions > \$500 removes the security deposit.

NOTE: Cash/CC sales will not have RTO details on this screen.

### Employer Information

Self Employed/Retired	<input type="checkbox"/>
Employer	
Employer Address	
City	
State	Select a State <input type="button" value="▼"/>
Zip	
Employer Phone	(xxx)xxx-xxxx

### References

Reference 1	
Ref 1 Phone	(xxx)xxx-xxxx
Reference 2	
Ref 2 Phone	(xxx)xxx-xxxx

### Secondary Customer

Name	
Social Sec #	XXX-XX-XXXX
Date of Birth	
Driver's License #	
Issue Date	
Address	
City	
State	Issue State Select a State <input type="button" value="▼"/>
Zip	
Email	
Cell Phone	(xxx)xxx-xxxx
Home Phone	(xxx)xxx-xxxx
Work Phone	(xxx)xxx-xxxx
<input type="checkbox"/>	
Self Employed/Retired	
Employer	
Employer Address	
City	
State	Select a State <input type="button" value="▼"/>
Zip	
Employer Phone	(xxx)xxx-xxxx

NOTE: If you add a secondary customer to the contract, you must also add a copy of their license (ID) to the contract uploads as well.

# Attach images with buttons

<input type="button" value="Upload ID One"/>	<input type="button" value="View"/>
<input type="button" value="Upload ID Two"/>	<input type="button" value="View"/>
<input type="button" value="Upload Other"/>	<input type="button" value="View"/>
<input type="button" value="Delete Other"/>	Payment 3896.10.jpg
<input type="button" value="Delete Other"/>	02.jpg
<input type="button" value="Delete Diagram"/>	01.jpg

**Build as shown in brochure:**

FXBG LOT MODEL

Notes about custom design, or location if lot model.

Two forms of ID are required for RTO contracts.

Upload serial plate picture and building picture for lot models.

Update custom diagram from SHED DESIGN for custom buildings.

**Continue**

**NOTE:** If the delivery address does not match the customer's license (ID) then you must upload an address verification document as the second ID.

**SECOND ID:** Library card, hunting/fishing license, car registration, utility bill, credit card, etc. - any official document that shows the name (or name and address if needed) to validate the customer's identity.

Once you select CONTINUE on this screen, the customer will automatically get a text to REVIEW and SIGN the contract.

## Choose method of payment to continue

Select a Payment Method:

Contract# 210837

Name:

Billing Address: Same as order

Add Split Tender

Total Due: \$ 2,826.74

Dealer Signature:

Your Signature

Signature:

Customer Signature:  
Can sign in person using iPad (on this screen) or they can sign using the TEXT LINK that they received.

Initials:

I have reviewed and confirm that all contract details are correct:

Review for Accuracy with the preview button and then select this check box.

- **Cash Payment** (received and paid to Premier via PAD invoice)
- **Personal Check** (payable to Premier Portable Buildings)
- **Certified Check** (payable to your LLC and logged as cash sale)
- **CC Payment**

In person/phone: manual entry on contract

Remote: <https://ppbpayments.com/>

Once you select SUBMIT on this screen, it will notify the Premier order entry team of the completed contract. No changes can be made to this copy.

# Most Common Contract Mistakes

**Color Selection:** Especially because trim/roof are not in the common order.

**List/Promotional Pricing:** Make sure the list price matches the current price sheet and that the promotional discount matches the current monthly promotion.

**RTO Assurance:** All RTO contracts must have one of the RTO Assurance options selected.

**On Lot New/Used:** Make sure you select new versus used for the building. All lot model repo/used buildings should be tagged as “on lot used”.

**Custom Design Selections:** The shop will build off of the details on the contract, and not necessarily the uploaded diagram, ensure that all of these details match. Anything CUSTOM and out of the norm should be fully noted on the contract and on the design (i.e. porch at 4' instead of 6' in length).

NOTE: When you navigate through the contract screens make sure you use the bottom left navigation buttons. Closing RTO Streamline, or exiting the contract without using the “Save as Pending and Exit” button will likely cause the data on the contract to glitch and remove data. Always double check details when entering back into a contract.