

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.

Once you proceed past the upload screen, to the final payment screen, the system will automatically send a text message to the customer to review the contract.

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View

<https://rtostreamline.com>

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

Make sure you enter the customer delivery address.

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

Directions

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:	<input type="text" value="(xxx)xxx-xxxx"/>	<input type="button" value="Verify"/> Not Verified
Home Phone	<input type="text" value="(xxx)xxx-xxxx"/>	
Work Phone	<input type="text" value="(xxx)xxx-xxxx"/>	
Email	<input type="text"/>	
Social Sec #	<input type="text" value="xxx-xx-xx"/>	
Date of Birth	<input type="text"/>	
Driver's License #	<input type="text"/>	
	<input type="text" value="Select a State"/>	
Issue Date	<input type="text"/>	
Own/Rent	<input type="text" value="Own"/>	
Name of Landlord	<input type="text"/>	
Landlord Home Phone	<input type="text" value="(xxx)xxx-xxxx"/>	
Landlord Street Address	<input type="text"/>	
Landlord City	<input type="text"/>	
Landlord State	<input type="text" value="Select a State"/>	
Landlord Zip	<input type="text"/>	

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	<input type="text"/>
Brochure	5395

Select the Correct Shop

Building Information

PO#/Contract#	211424
Sales Price	\$0.00
Building Condition	<input type="text"/>
Siding Type	<input type="text"/>
Building Style	<input type="text"/>
Inventory Number	
Custom Siding Color	<input type="checkbox"/>
Siding Color	Upper <input type="text"/> Lower <input type="text"/>
Custom Roof Color	<input type="checkbox"/>
Roof Color	<input type="text"/>
Custom Trim Color	<input type="checkbox"/>
Trim Color	<input type="text"/>
Size Width	<input type="text"/>
Purchase Type	<input checked="" type="radio"/> <input type="radio"/> Decline RTO Assurance

Enter Building List Price

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.

<input type="radio"/> RTO Assurance	
<input type="radio"/> RTO Assur	
Add Metal Cost	

0.00

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

0.00

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

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

Employer Information

Self Employed/Retired ☐

Employer

Employer Address

City

State

Select a State



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 State

Select a State



Issue Date

Exp Date

Address

City

State

Select a State



Zip

Email

Cell Phone

(xxx)xxx-xxxx

Home Phone

(xxx)xxx-xxxx

Work Phone

(xxx)xxx-xxxx

☐

Self Employed/Retired

Employer

Employer Address

City

State

Select a State



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) the the contract uploads as well.

Attach images with buttons

Upload ID One

Upload ID Two

Upload Other

Payment 3896.10.jpg

02.jpg

01.jpg

Build as shown in brochure: ☐

FXBG 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.

Notes about custom design, or location if lot model.

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:

Select 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:

Retrieve Signatures

Resend Signature Text

Preview Contract

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

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

Back To Uploads

Clear Payment Info

Submit

- **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.

<https://rtostreamline.com>

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 existing 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.