

MIF Connect CRM Training Aid

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Notification Emails

First connect notification sent to branch is the “Sales Request.”

Sales Request

The **Sales Request** is not yet fully executed/approved by VP of Sales. This will allow branches to start working on loans ahead of the executed contract (as needed).



Dynamics Power Automate

To Erika Root; Cristi Curran; Nathan Barraco; Lauren Mink; Joel C. Smith; Jenna Skuza; Andrew Wilson; Julie Ellis; John Hennebery

Retention Policy 3 Year MI Standard (3 years)

Expires 8/4/2029

 You forwarded this message on 8/5/2026 9:41 PM.



Connect Notification

Hi Team,

A Connect **Sales Request** has been generated and requires your attention. Please review the details below.

Community	Silver Springs
Job Number	28510
Primary Buyer	Tyler
NHC(s)	Brian Nelson
Total Sales Value	\$544,990.00
Quote Number	Q001
Initial Deposit Amount	\$2,500.00
Sales Design Type	Home Sale

Please review this sales request quote's sales design in Connect. [Click Here](#)

Thank you,
MI Homes Sales Automation

Home Sales Quote

Once the contract is executed and approved, you will receive the **Home Sales Quote** like below.

Attention! Connect Home Sale Quote Confirmed for 285103000105 in Hillcrest Village



Dynamics Power Automate

To Jenna Skuza; Julie Ellis; Nathan Barraco; Lauren Mink; Joel C. Smith; Erika Root; Andrew Wilson; Cristi Curran; John Hennebery

Retention Policy 3 Year MI Standard (3 years)

Expires 8/3/2029

 You forwarded this message on 8/4/2026 2:11 PM.

  Reply  Reply All

Connect Notification

Hi Team,

A Connect **Home Sale Quote** has been Confirmed and requires your attention. Please review the details below.

Community	Hillcrest Village
Job Number	285
Primary Buyer	Mary
NHC(s)	Brian Nelson
Total Sales Value	\$489,990.00
Quote Number	Q001
Initial Deposit Amount	\$10,000.00
Sales Design Type	Home Sale

Please review this confirmed home sale quote's sales design in Connect. [Click Here](#)

Thank you,
MI Homes Sales Automation

Contract Folder Alerts

This email will be distributed daily and includes ALL contract updates (including inventory homes). Branch must go through all alerts to review the changes.

Tip: If a contract name starts with “Inv” that indicates it is an unsold inventory home. MIF can quickly skip these!

Nashville Contract Folder Alerts



Power AppsFlow

To **Nashville Contract Alerts**

Retention Policy 3 Year MI Standard (3 years)

Expires 8/5/2029

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

[Summarize](#)

Reply
 Reply All
 Forward

Thu 8/6/2026 8:08 AM

Name	Author	Date	Community	Lot Number
Nashville - Change Order1_Q0015378_2026-08-05T13_53_39.pdf	Connect Doc	8/5/2026 12:53 PM	Bledsoe Springs-285115	285115000129
Summarycertificate_Q0015378_2026-08-05T13_53_39.pdf	Connect Doc	8/5/2026 12:54 PM	Bledsoe Springs-285115	285115000129
Inv Addendum A_WTP_285122000947_8_5_2026_11_51 AM ET.docx	Connect Doc	8/5/2026 10:53 AM	Windtree-285122	285122000947
Inv Addendum A Construction_WTP_285122000947_8_5_2026_11_51 AM ET.docx	Connect Doc	8/5/2026 10:53 AM	Windtree-285122	285122000947
Inv CO Addendum Price_WTP_285122000947_8_5_2026_11_51 AM ET.docx	Connect Doc	8/5/2026 10:53 AM	Windtree-285122	285122000947
Inv CO Addendum Construction_WTP_285122000947_8_5_2026_11_51 AM ET.docx	Connect Doc	8/5/2026 10:53 AM	Windtree-285122	285122000947
Inv Addendum A_WTP_285122000940_8_5_2026_1_03 PM ET.docx	Connect Doc	8/5/2026 12:05 PM	Windtree-285122	285122000940
Inv Addendum A Construction_WTP_285122000940_8_5_2026_1_03 PM ET.docx	Connect Doc	8/5/2026 12:05 PM	Windtree-285122	285122000940
Inv CO Addendum Price_WTP_285122000940_8_5_2026_1_03 PM ET.docx	Connect Doc	8/5/2026 12:05 PM	Windtree-285122	285122000940
Inv CO Addendum Construction_WTP_285122000940_8_5_2026_1_03 PM ET.docx	Connect Doc	8/5/2026 12:05 PM	Windtree-285122	285122000940



Home Sale Change Order

Home Sale-Change Order Quote/Option-Sale Change Order Quote notifications will be sent via email when a change order is completed on a home. Please see examples below.

Please note, “Home Sale-Change Order Quote” is for homes that are **sold and under contract.**

The “Option-Sales Change Order Quote” are not “sales” these are internal builder change orders (i.e., specs, models etc.)

Connect Notification

Hi Team,

A Connect **Home Sale-Change Order Quote** has been Confirmed and requires your attention. Please review the details below.

Community	Barton's Mill
Job Number	2851
Primary Buyer	Jeffrey
NHC(s)	Taffie Bracht
Total Sales Value	\$9,560.00
Quote Number	Q00
Initial Deposit Amount	NA
Sales Design Type	Home Sale - Change Order

Please review this confirmed Home Sale-Change Order quote's sales design in Connect. [Click Here](#)

Thank you,
MI Homes Sales Automation

Connect Notification

Hi Team,

A Connect **Option Sale-Change Order Quote** has been Confirmed and requires your attention.
Please review the details below.

Community	Avienmore
Job Number	270
Primary Buyer	Viral
NHC(s)	Ally Gilbert
Total Sales Value	\$0.00
Quote Number	Q001
Initial Deposit Amount	NA
Sales Design Type	Option Sale - Change Order

Please review this confirmed Option Sale-Change Order quote's sales design in Connect. [Click Here](#)

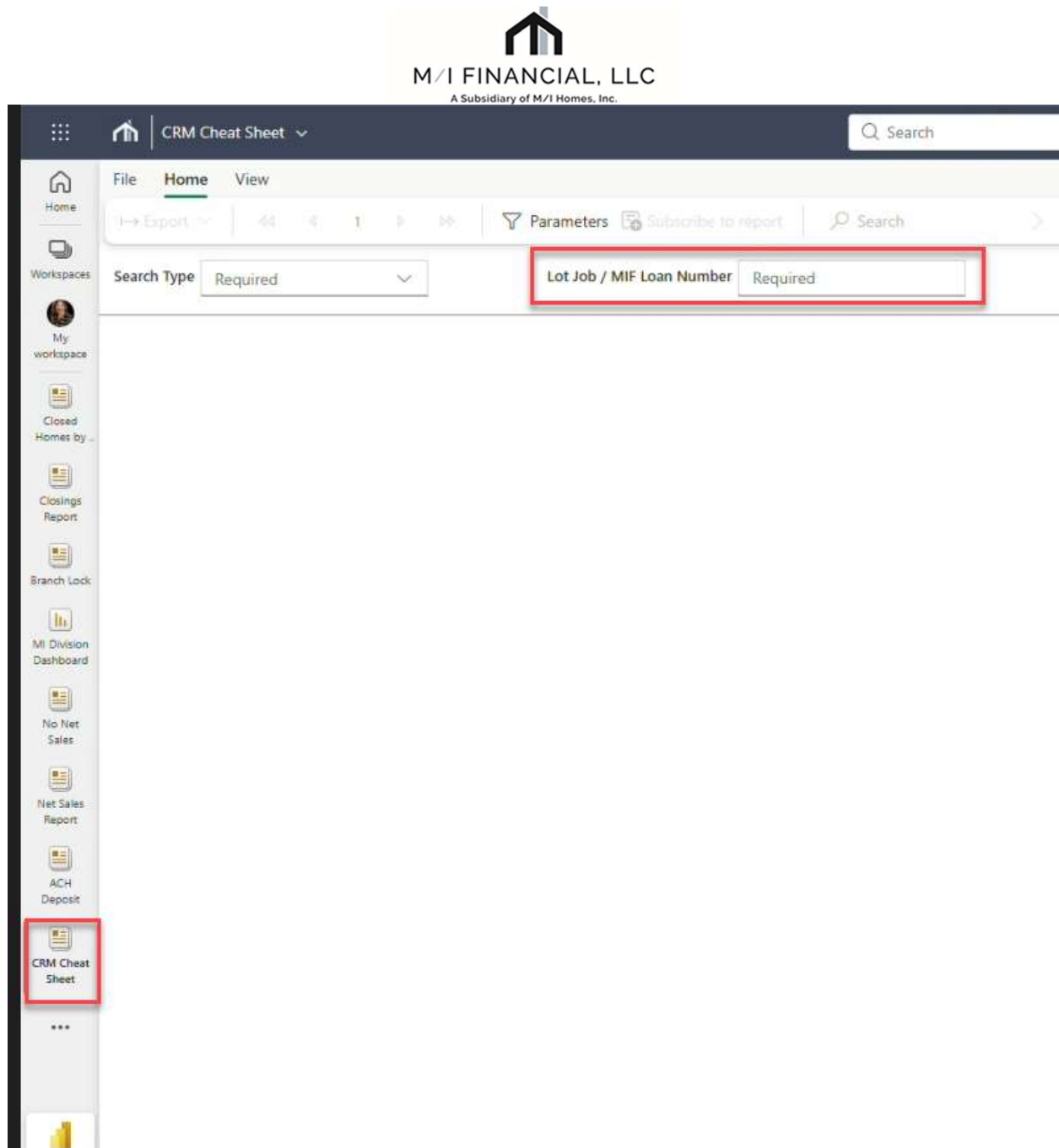
Thank you,
MI Homes Sales Automation

Cheat Sheet & ACH Deposits

To pull cheat sheets and ACH deposits, you will pull the report by the “job lot” in the search bar.

(Resources>Reporting>Corporate Reports>CRM Cheat Sheet)

Cheat Sheet: <https://app.powerbi.com/groups/me/rdlreports/92757909-a935-44de-93e6-f2d4ed37ef65?experience=power-bi>



ACH Deposit: <https://app.powerbi.com/groups/me/rdlreports/3216312f-64d9-46d6-a262-9a91e48028eb?experience=power-bi>

Best practice is to compare the ACH Deposits to Connect to verify the deposits received. There have been issues with duplicate receipts on ACH deposit report, so connect **must** be referenced to ensure accuracy.

ACH Deposit ▾

File Home View

Export ▾
1
Parameters
Subscribe to report

Search

LotJob

Required

JobNumber ▾

Required

Deposit

Required ▾

Non-ACH Deposits will not reflect in the ACH deposit list. Branch will go to **Connect > Deposits** and then **double click** on dollar amount to save pdf of check deposit

0037 - Saved

Lot - HomebuilderONE ▾

General
Lot Pricing
Property Details
Sales Designs
Quotes
Opportunities
Deposits
Contracts
Status Tracking
Permits
Alerts
Construction
Occupancy
Related ▾

Transaction T...	Contact ▾	Quote ▾	Opportunity ▾	Sales Pers... ▾	Amount ▾	Due ... ↑ ▾	Payment D... ▾	Bank Deposit D... ▾	Deposit Ty... ▾	Deposit St... ▾	Payment Met... ▾
☐ Deposit	Rebecca E...	: Rebecca Wasilews...	235 Rebecca W...	KA Kristina Ag...	\$0.00	6/30/2026	7/3/2026	6/30/2026	Contract	Processed	ACH
☐ Deposit	Rebecca E...	: Rebecca Wasilews...	235 Rebecca W...	KA Kristina Ag...	\$0.00	7/6/2026	7/9/2026	7/6/2026	Contract	Processed	ACH
☐ Deposit	Rebecca E...	: Rebecca Wasilews...	235 Rebecca W...	KA Kristina Ag...	\$5,000.00	7/9/2026	7/9/2026	7/9/2026	Contract	Processed	ACH
☐ Deposit	Rebecca E...	: Rebecca Wasilews...	235 Rebecca W...	KA Kristina Ag...	\$25,000.00	7/21/2026	7/23/2026	7/24/2026	Contract	Processed	Check

Rows: 4

Once you click on the amount of Check, scroll to Recent and click pdf and save:

Read-only: You don't have access to edit this record.

[←](#) [📄](#) [↶](#) [▶ Initiate Payment](#) [🔄 Refresh](#) [🔍 Check Access](#) [📄 Flow](#) [📄 Word Templates](#) [📄](#)

DEP-0000037443 - Saved

Deposit · MI Homes - HomebuilderONE ▾

[General](#) [ACH](#) [Deposit Transactions](#) [Refund History](#) [Related](#) ▾

Amended Amount

Deposit Stage: Processed

Line Number: 2

Comments

Today Date: 8/12/2026

Attachments

🔍 Search timeline

🌈 Highlights

▾ Recent

JA Modified on: 7/24/2026 3:28 PM
 📝 Note modified by [Jill Adcock](#)
 📄 [SDRm37.pdf](#)
 View more

Helpful Hint: When searching for a NON-ACH deposit, utilize the drop down at the top of the deposit screen and select MI HOMES – Homebuilder One. Sometimes the drop down will reflect HOME BUILDER ONE, this selection will not show the .pdf needed.

[←](#) [↶](#) [▶ Initiate Payment](#) [🔄 Refresh](#) [🔍 Check Access](#) [📄 Flow](#)

DEP-0000038860 - Saved

Deposit · MI Homes - HomebuilderONE ▾

[General](#) [HomebuilderONE Amend Deposit](#) [Refund History](#) [Related](#) ▾

✓ MI Homes - HomebuilderONE

Amended Amount

JDE Number

(MIF Branch Reporting>ACH Blended Data)

You will need to enter the job lot as follows: - JDE Number

XXX YYY ZZZZZZ

X= Division Code (starts with a 2)

Y= Community Code (should be able to get from the builder)

Z= Job lot, but must be entered as 6 digits... so add zeros to beginning to total 6

Community	Abbreviation	Community Code
Aberdeen	ADN	415
Amber Glen	AMG	464
Annsborough Park	ABP	403
Avienmore	AVM	418
Bellamore	BLM	218
Boulder Ridge	BDR	447
Canterbury Station	CAN	446
Emerson Glen	EMG	422
Laurelbrook	LBK	436
Piper Landing	PLD	411
Spring Grove	SPG	420
Whitaker Pointe	WTP	326
Willoughby Park	WBP	425

Example: 2704150000123--- this is lot 123 of Aberdeen in Charlotte

This number is on the contract notifications as well.

Reports

All reports for Connect CRM need to be the **Fabric reports** not the SSRS reports.

SSRS = Pivotal

Fabric = CRM Connect

Finding a contract

SharePoint/Intranet:

Divisions>Chicago>Chicago Contracts>Site Contents> Choose Community (not MISC) and look for lot number (should be last digits on line)

Ex: This lot 12 (274403000012)

270403000012

NH

Nashville House Docs

Home

Site contents

Recycle bin

Contents

Subsites

Name	Type	Items	Modified
 Barton's Mill-285113	Document library	543	8/4/2026 3:05 PM
 Barton's Mill-285113 - MISC	Document library	251	6/17/2026 3:24 AM
 Bledsoe Springs-285115	Document library	350	8/6/2026 2:13 PM
 Bledsoe Springs-285115 - MIS	Document library	206	8/6/2026 2:59 PM
 Carellton-285112	Document library	152	6/17/2026 3:29 AM
 Carellton-285112 - MISC	Document library	122	6/17/2026 3:30 AM
 Copper Valley-285134	Document library	0	6/22/2026 11:03 AM
 Copper Valley-285134 - MISC	Document library	0	6/16/2026 9:16 PM
 Documents	Document library	0	5/6/2026 10:47 PM
 Form Templates	Document library	0	5/18/2026 1:45 PM
 Hamilton Reserve-285124	Document library	0	6/16/2026 9:16 PM
 Hamilton Reserve-285124 - M	Document library	0	6/16/2026 9:16 PM
 Hawks Landing-285101	Document library	264	6/17/2026 3:32 AM



Branch Manager: CRM Preparation Checklist

To be as prepared as possible for the CRM Connect release, we recommend the branch manager have the following **ahead** of go-live:

1. Identify list of who needs access to Connect
2. Identify standardized list MIF team who need to receive Connect email notifications
3. Identify the Community Code and JDE #s. If not yet created, a resource should be created to help distribute to branches.

Information on item 1 & 2 should be communicated with the Connect implementation team to ensure the set up is completed correctly.

Connect Terminology Cheat Sheet:

Connect Warranty/Lot Terminology Cheat Sheet:

Columns marked with an * denotes that there is no existing term in Pivotal that matches with the new term in Connect.

Connect Warranty Terminology Cheat Sheet		
OLD PIVOTAL TERM	NEW CONNECT TERM	DEFINITION
GLOBAL		
Division	Division / Business Unit	Parent level entity in the system. Location where service team members are defined for warranty.
Community / Phase	Element	
Homesite	Lot	
Companies	Accounts	Business entity management (Brokerage, Mortgage Lender, Warranty Vendor)
Employee	Users	Registered Connect system user
Construction Stage	Construction Phase	
Homeowner/Buyer	Customer/Contact/Buyer	Various areas of the system will display interchangeable buyer references.
Assigned To	Owner	In this context, the owner refers to the CCM responsible for the record in Connect.
WARRANTY		
Account/Contractor	Account/Vendor	Vendor = account type
Contact	Contact/Contractor	Contractor = contact associated with the vendor Ex: Primary Warranty Contact
New Service Appointment	Appointment/Warranty Appointment/Vendor Appointment	
Service Request	Cases	Submitted requests from customers
Service Request Items	Case Lines	Warranty line items in a request
Case Type	Request Category	Case categorization
Category	Customer Service Category	Service classification
Sub Category	Customer Service Items	Detailed service breakdown
Issue	Customer Service Issue	Problem identification
Work Order	Vendor Appointment & Work Detail	Appointment = zero-dollar work order request. Work Details = work orders with a dollar amount.
Case Source	Request Source	
*	Close Reasons	A 'close reason' is required in the system for a user to be able to close the case line.

Declined	Closed Rejected	In areas of the system where a user would see decline, the system will now present 'reject.'
Aging	Service Level Agreements (SLAs)	Aging of warranty items is now tracked and displayed via system-defined SLAs rather than displayed in Connect.
Close Case	Resolve Case	

LOT / PROPERTY		
Sold Options	Property Details	Contract options sold with the home appear on property details tab.
Connections	Occupant/Lot Occupancy	Found within the Occupancy tab in Connect under the Lot.
Warranty Details	Warranty Types	Warranty expirations based on structural, repose, delivery systems, workmanship & materials.
Contractors	Warranty Vendors	Vendors who performed work on the lot. Different from vendor contacts/accounts.
Alerts	Lot Alerts & Special Instructions	Within the Lot Alerts tab, special instructions can be added that will appear on new Cases.
Site Type	Stock Type	The stock type will display whether the lot is an inventory, a model, a sales center or a model and sales center.
Garage Hand / Swing	Orientation	

Connect Sales Terminology Cheat Sheet:

Columns marked with an * notes that there is no existing term in Pivotal that matches with the new term in Connect.

Connect Sales Terminology Cheat Sheet		
OLD PIVOTAL TERM	NEW CONNECT TERM	DEFINITION
GLOBAL		
Division	Division / Business Unit	Parent level entity in the system. Location where service team members are defined for warranty.
Community / Phase	Element	
Homesite	Lot	
Companies	Accounts	Business entity management (Brokerage, Mortgage Lender, Warranty Vendor)
Builder Name	Competitor	If a prospective homeowner is lost to another builder, that name is recorded in the Competitor field.
Employee	Users	Registered Connect system user
Assigned To	Owner	In this context, the owner refers to the CCM responsible for the record in Connect.
Construction Stage	Construction Phase	
Sync Inventory to ERP	Send to ERP	Button on the Lot and Confirmed Quote to send data to JDE
*	Send to Envision	Button on the Lot and Confirmed Quote to send data to Envision
*	Opportunity Closed as Lost	Notates the end of the lifecycle of an Opportunity with an unsuccessful outcome.
Stories	Floors	
Basement / Slab	Basement Type	
LEAD MANAGEMENT		
Action Plans	Sequences	Automated planned activities for leads
*	Connections	All persons/entities related to the sales cycle
Convert Lead	Qualify Lead	Transition a lead into a prospective homeowner
CUSTOMER MANAGEMENT		
Contact	Contact	Repository for all customer types: Buyer, Co-Buyer, Prospective Homeowner, Agent/Realtor, Escrow Officer, Loan Officer, Title Officer
Prospect	Prospective Homeowner	
Realtor	Agent	
Associated Contacts	Connections	All persons/entities related to the sales cycle
Action Plans	Sequences	Automated planned activities for prospects
Visit Details	Traffic	Initial & Be-Back traffic
*	Opportunity	Container for sales designs, quotes/contract documents, deposits, and change orders. Lives on the contact record.
Community of Interest / Neighborhood Profiles	Areas of Interest	

QUOTE		
Quote In Progress	Sales Design Created	A scratchpad of design price worksheets that can be revised until finalized by the buyer and quotation is sent.
Plan Elevation	Plan	1 field in Pivotal split into 2 separate fields in Connect
	Elevation	1 field in Pivotal split into 2 separate fields in Connect
Select Options	Options Selector	
Neighborhood / CCD Fees	Fees – Community & HOA	
Sales Request (Quotation Sent)	Awaiting Final Sign Off	NHC and buyer have signed the Sales Design. Awaiting Manager Signature.
Contract In Progress	Quote Confirmed	Confirmed in Connect = a "sold" home.
Quote Inventory	Lot > Stock Type = Inventory & Synced to JDE/Envision	
Change Order	Home Sale Change Order	Options created in Connect by the NHC for a home sale.
*	Option Sale	Options created in Envision that integrate to Connect for a home sale.
*	Option Sale Change Order	When options are changed in Envision and then pushed to Connect on an existing option sale.
Contract Closed	Opportunity Closed as Won	Notates the end of the lifecycle of an Opportunity with a successful outcome.
Sales Request Declined	Reject (Quote)	The Reject button is located in the command bar at the top of the page in Connect.
Contract Cancel Request	Opportunity Canceled; Order Change Created	
Contract Canceled	Order Change Approved; Quote Canceled	
DEPOSITS		
Scheduled Date	Due Date	Date that the deposit is due
Received Date	Payment Date	Date that the deposit is received by an NHC / Designer / Buyer Portal
Check Number	Payment Reference	Check, Wire, Cashier's Check, & Money Order