

Customer Service Plus

for IBSWIN
(Version 12.XX)

Expanded User Guide

The screenshot displays the IBSWIN software interface. On the left is a 'TASKS' pane with a tree view containing categories like SALES, DESIGN STUDIO, and PURCHASING. The main window shows a 'Flow Chart' tab with a diagram titled 'THE INTEGRATED BUILDER SERIES'. The diagram illustrates a central 'Common Database' connected to five functional areas: Sales, Scheduling, Purchasing, Service, and Options. Above the Sales node is a 'Buyers / Subcontractors WebView Interface' with an icon of a worker. Below the Service node is a 'Sage 100 & Sage 300 CRE Accounting Interface' with the Pharaoh Information Services logo.

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IBSWIN – Customer Service Plus User Guide

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and the latest developments in our *IBSWIN* line of software.**

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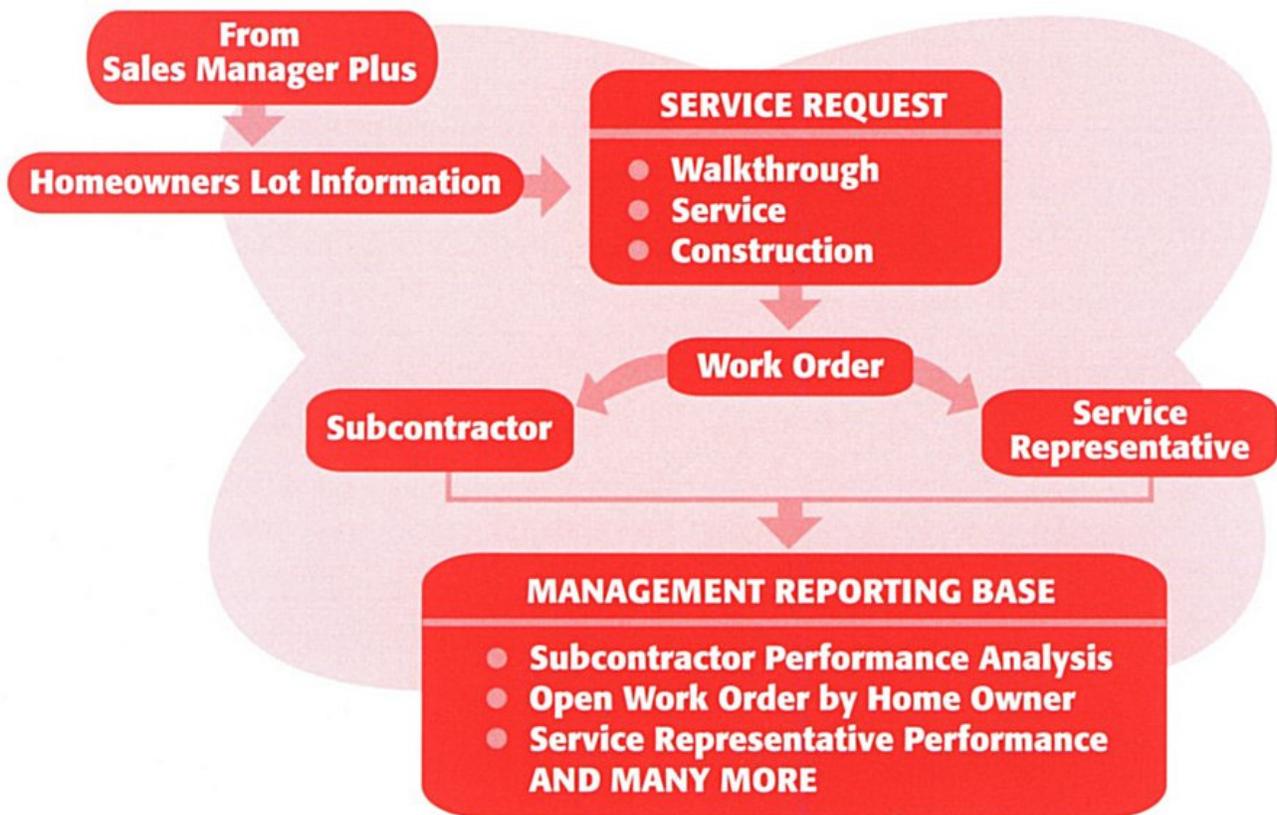
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Introduction

Customer Service Plus gives your customer Service Department the resources to quickly respond to problems and provide the tools to easily monitor to completion. Insures customer satisfaction and helps enhance the "Quality Image" of your homebuilding company, by providing timely reports and inquiries. It is designed to run on your existing Windows based computer systems.

CUSTOMER SERVICE PLUS FLOWCHART



Homeowner Lot Information

All pertinent details are maintained in a master record for easy access, and future reference to key data.

Walkthrough / Service Requests

All Homeowner Service Requests are logged into the system for accurate records and to ensure important homeowner problems are properly tracked.

Tracks multiple types of service calls to pinpoint quality control problems and improve customer satisfaction

Homeowner Outstanding / Work Order Report

List all open work orders and tracks by subcontractor/service representatives for work not completed.

Prints all work orders by homeowner.

Work Orders

Prints work orders for subcontractors and service representatives. This eliminates the manual typing effort involved with work orders, which speeds up customer service response time.

Work Order Aging Report

Lists outstanding work orders by subcontractor or service representative and indicates elapsed time since issue date. This provides management with efficiency reporting.

Tracks work orders with the touch of a button, providing a quick update of every customer problem and its status.

Work Order Report

Eliminates need to maintain manual control log.

Subcontractors

Tracks subcontractor performance, through analysis of the number of call backs, work order completion, and gives you the ability to isolate problem subcontractors.

Subcontractor Reports

Subcontractor performance analysis gives you the information needed to negotiate more effectively with your subcontractors.

Service Representatives

Track work orders by service representatives.

Performance reporting by service representatives with elapsed time to completion of each work order.

Identify potential problems through analysis of Work Order Aging Report.

Setting-up Service Discrepancies

IBSWIN provides a way to classify problem types by using descriptive categories. A list of service discrepancies does come by default with the system. These can easily be modified.

To review the Service Discrepancy categories choose **Setup: Customer Service: Service Discrepancies** from the main menu. This will display the current list of categories. Use the **New** button to add additional service discrepancies. The rest of the buttons are self-explanatory.

Note: You can attach a trade to each service discrepancy. This will create a *short list* during service request item entry.

Discrepancy	Description	Trade
APP1	Appliance not working	APPL
APP2	Appliance installed incorrectl	APPL
AUD1	Audio system install problem	AUDI
CAB1	Cabinets - install problem	CABI
CAB2	Cabinets - repaint	CABI
CER1	Ceramic Tile - Grout Problem	CERA
CERA	Ceramic Tile Cracked	CERA
CLEA	Clean up - general	CLEA
CRP1	Carpet - color problem	CARP
CRP2	Carpet - seam / install issue	CARP
CUSR	Customer Service repairs	CUSR
DOOR	Door repairs	
DRY2	Drywall - redo area	DRYW
DRYW	Drywall - general	DRYW
ELEC	Electric wiring problem	ELEC

Setting Up Room Descriptions

Found under **Setup: Customer Service: Room Descriptions** this screen is a master list of all the rooms that can potentially have a problem or service discrepancy. This will allow you to select the room where a particular service item is located (see page 16).

Note: This list ties in directly with our Designer Center (Flooring and Window Covering) modules. If you have either of these modules then it is recommended that you consult your designers first before making changes and/or additions to this list.

To add new rooms, select **New** and enter a sequence number to insert the room in the correct location. It is recommended that you use a numbering system that is in increments of ten, for example: 010, 020, 030, etc. Then specify the type of room in the **Room Description** column.

Once completed hit the **Save** button to save your changes or **Exit** if you do not want to save your changes. To change the name of an existing room, select the room you would like to change and delete or type over the room description.

Seq#	Room Description
001	Hallway1
002	Entry
003	Bathroom 1
004	Dining Room
005	Living Room
006	Family Room
007	Kitchen
008	Nook Area
009	Stairs
010	Bedroom 1
011	Bedroom 2
012	Master Bedroom
013	Master Bathroom
014	Bonus Room
015	Study
016	**Kit. Countertp

The **Copy** button allows you to copy room descriptions from one project to another. The **Replace Seq#** button allows you to change the sequence of the rooms and is a function necessary for those with/using any of the Designer Center modules (please see note above).

Merge Letters and Documents

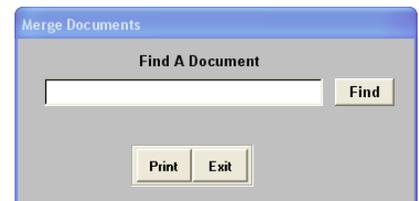
IBSWIN can use your existing or newly created letters and/or documents which have been created in Microsoft Word to generate a customized *form letter* for either one or more of your Buyers, Subcontractors, or Prospects with a click of a button. This can be done simply by inserting IBSWIN *merge fields* that are made available from within Word so that you can create a generic *merge template* for each type of letter or document you use. Each time you print your *merge template* from within our system, at specified locations, any personalized information (e.g. recipient/subcontractor name and contact details, any project/phase information, etc) will be inserted automatically into your *merge template* and your *form letter* will be created ready for printing.

Creating your initial document

Using Microsoft Word create your template letter or document as you normally would leaving blank spaces or place holders for any areas where information from IBSWIN can be inserted once your *form letter* is generated. As this is a normal Word document you can format this with any fonts or features available to you in Word.

Inserting IBSWIN merge fields to create a merge template

To insert the merge fields to be populated by IBSWIN start by selecting **Setup: Merge Documents & Templates** then **Buyer Merge, Prospect, Subcontractor** or **Contracts Documents** depending on the type of document you wish to create. The window pictured will open. Using the **Find** button, browse and select the document you wish to modify/insert merge fields into and then select the **Print** button.



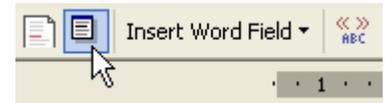
Depending on the document, the version of Word, and other environmental factors Word will open either once or twice and you may even get an error message in IBSWIN.

If Word opens once, then please go to the next subheading *Inserting Merge Fields*. If you go back to IBSWIN and see an error message then just select *ignore*. This is normal and is no cause for concern.

If Word opens twice, then first instance will be the template document you created and the second instance will be an attempt for Word to generate *form letter* (which it will call Form Letter 1). As we are not generating a *form letter* and there is no data for it to insert you can just ignore (or close) that form letter or second instance of Word and return to your template. If you go back to IBSWIN and see an error message then just select *ignore*. This is normal and is no cause for concern.

Inserting the actual merge fields

When viewing your template you will see a new menu/toolbar that is now available to you in Word. This toolbar will assist you in inserting the merge fields into your document. To do this you will use the **Insert Merge Fields** button which, depending on your version of word, will appear as either a picture (see above) or as a button visibly named **Insert Merge Fields** similar to the Insert Word Field button pictured. Generally the Insert Merge Field button will be located to the immediate left of the **Insert Word Field** button.



When you select the **Insert Merge Fields** button the list of merge fields available to you (from IBSWIN) will appear ready to be inserted into your template. To do this is as simple as pointing your cursor to a specific location where you would like a merge field, going to the **Insert Merge Field** button and selecting the appropriate field. A merge field will then be inserted into your document which will automatically fill in with your data when you generate your letters. Keep inserting as many merge fields as you need and save this new *merge template* document for future use. (Examples of merge letter templates can be found in the *IBSWIN* folder).

Note: If you wanted to insert today's date into your document you will need to go, in Word, to Insert: Date and Time and then you can select how you would like the date to appear in your document when it is created.

Processing and generating custom form letters & documents

There are three (3) ways that you can generate form letters within the IBSWIN System:

1. One letter at a time

This is done from within the **Service: Buyers and Service Request** screen once you have selected the relevant buyer. With this screen open select **Print: Form Letters** which will allow prompt you to select a specific document which can be generated for the buyer that you have already selected. This can used to create follow up letters acknowledging a request that has been processed, fax headers, etc. The Sales Plus module also has a similar function which can be done for Prospects and Buyers.

2. Multiple letters

There are two locations from where you can generate buyer letters/documents in IBSWIN. The first is from **Customer Service: Buyer Letters** where you can choose to print from a selection of buyers within a phase and within specified sale date range or by service discrepancy. The other location is from the **Reports: Form Letters** menu where you can choose from either **Buyer** or **Subcontractor Letters**. No matter which location you choose to create your form letter from, after selecting any criteria required to narrow down the buyers you wish to create letters/documents for a window will open displaying the list of buyers.

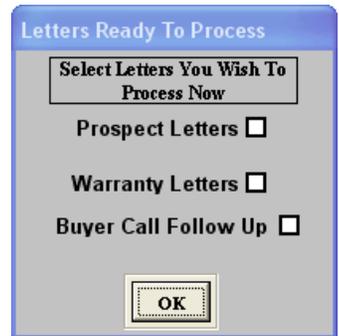
Buyer	Lot	Address	Sale Date	Print
VERELST	01	5141 OAK BLUFF	/ /	Print
TRACEY	016	5181 OAK BLUFF	/ /	Print
SMITH	03	5145 OAK BLUFF	/ /	Print
COLLINS	04	5147 OAK BLUFF	/ /	Print
JOHNSON	05	5151 OAK BLUFF	/ /	Print
MCKENZIE	06	5153 OAK BLUFF	/ /	Print
SMITH	07	5160 OAK BLUFF	/ /	Print
GOODFELLOW	08	5162 OAK BLUFF	/ /	Print
GABRIEL	09	5164 OAK BLUFF	/ /	Print
FRANKS	10	5166 OAK BLUFF	/ /	Print
FREEDMAN	11	5168 OAK BLUFF	/ /	Print
WHITE	12	5170 OAK BLUFF	/ /	Print

entry in the Automated Letters screen, and delete the old one. The same applies if you change the name of the file/document. Also not that it is our recommendation that your letter/documents, especially automated one, be stored on the same drive/server as you IBSWIN software.

Processing Automated Letters

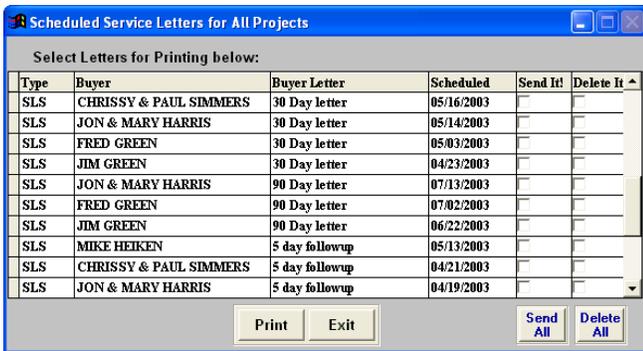
There are two (2) ways to process your automated letters. The first is when you first login to IBSWIN.

1) If any letters are due to be sent (or are past their scheduled date but have not yet been sent) you will be reminded to do so each time you login. This is via a small popup window that shows you if you have any prospect, buyer, and/or warranty letters (or even any scheduled telephone calls see page 25) that are due to be sent. These notifications will appear only to those users with the appropriate security settings.



If you are choosing to process any or all letters as you login then you can choose which category/s of letters you wish to process (or send) by checking the appropriate box/s. Select **OK** and a window listing all the letters scheduled to be sent will appear.

Note: If you choose not to process any letters or calls at this time then do not check any of the options and select **OK** to continue logging into IBSWIN.



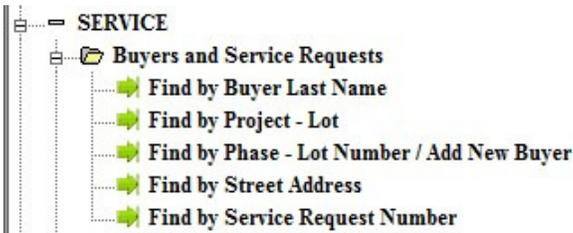
This automated letter processing screen provides you with the option to either: **Send All** or **Delete All** letters or you can checkmark the letters you wish to send or delete individually. Deleting a letter will remove it permanently from the scheduled list and you will no longer be prompted to send that selected letter to the buyer.

After you have selected one or more letters to **Print** Microsoft Word will open twice. The first instance will be the actual *merge template* and the second will be your newly *form letter* with all the custom information populated from IBSWIN. You can now either edit your letter even further (if needed) or just print it using the print button.

After you have generated your letters IBSWIN will then ask you if you wish to print mailing labels for these buyers. If you choose to do so, you will be asked if you wish to use the lot address, in most cases you would select **Yes** and using the Avery 5160 (3 x10) label sheet you can automatically print your labels.

2) The second way to process automated letters is to go directly to **Service: Auto Warranty Letters** and the same screen pictured above will appear where you can select the letters you wish to process.

Processing Customer Service Requests



You can find buyers and their service requests in a number of different ways; by last name, by project-lot number, by phase-lot number, by street address, or by service request number. However, if you're entering the initial service request for a new homebuyer

you will first have to enter the new buyer. This can be done by selecting **Customer Service: Buyers and Service Requests: New Homebuyer**.

The *New Homebuyer* selection allows you to add a new homebuyer and make their options selections. You will only be able to edit the projects you have been given access to through the security setup. Select the desired phase by clicking on the side arrow.

Note: by typing a portion of the phase name and/or using the down arrow key, you can quickly get to the phase desired.

Buyer Information and Service Request Screen

The Buyer Information Screen (pictured) shows all service requests that have been made by that buyer. The top portion of the screen provides all the pertinent information about the buyer including: address, phone numbers, color scheme, and the work order expiration date. Other than the contact details you will notice specific information in regards to the buyers purchase. Each buyer can have an unlimited number of Service Requests. Each Service Request can have an unlimited number of Items. There are a few things you should know:

Phase	SJE01	ESTATES -PHASE1	Div	01	Pharaoh Homes - SoCal
Lot	03	Tract 51665	Proj	S01	San Juan Estates
Salutation		Seq 03	Home Phone	() - () -	Fax () - () -
Last Name	SMITH		Work Phn1	() - () -	Cell 1 () - () -
Full Name	FRED & JEAN SMITH		Work Phn2	() - () -	Cell 2 () - () -
Address	5145 OAK BLUFF		Color Scheme	CDS	
	SAN JUAN CAPISTRANO CA 91871				
Plan	30	Elev: B	Sq Ft	3,630	
Closed	04/15/2002	Expired	04/15/2003		
Email					

Req #	Req Date	Type	Rep	Enter	Items	Sched Dt	Complete	Notes	Comments	Committe Rpt
000053	04/30/2002	W	JHN	N	2	/ /	/ /	Notes		
000076	04/14/2003	R	JHN		1	/ /	04/25/2003	Notes		
000081	05/19/2003	R	JHN		2	/ /	/ /	Notes		

View Options	Save	New	Delete	Items	Byr Note	W/O	Print	Letter Trak	Exit
--------------	------	-----	--------	-------	----------	-----	-------	-------------	------

1. When the *Closed* (Escrow) date is entered, the *Expired* date will automatically be one year after the closed date. This is the default warranty period which can be changed via **Setup: Company Config: CustSrv**.
2. The **Call FollowUp** button allows you to keep a historical record of the phone calls made to this buyer and even schedule them. (Please refer to Tracking and Scheduling Phone calls on page 25)
3. The **Alternative Address** button is the same as the *Current address* in the Sales Module. It is where you can enter an alternative address for the buyer. If this field was entered by the sales people then it would represent the buyer's previous address prior to moving into their new home,

or it can be their current address if the buyer is leasing the house or does not reside in it. You can print letters and labels based on the address entered here however you will need a different merge letter template for the address to appear correctly. This is assuming that your merge template was setup for the lot address.

4. The **Color Scheme** field ties directly into the color column in the sequence sheet. By double clicking on this field, a *note* window will open showing any color scheme or paint codes that have been used for the home placed on this lot. If it is blank you can enter it in here. This information will appear on selected reports. This will allow you to better assist buyers by having the paint code information handy for any requests.
5. Anyone with the appropriate security rights may edit the Buyer Information area (in any module). These edits will transfer globally throughout **IBSWIN**.

Creating Service Requests

1. To create a work order/service request select the **New** button from the bottom of the screen. Using the column definition chart below (as a guide) enter all the pertinent information for the specified buyers request/service order.

Buyer Service Request Screen columns defined

Req #	<p>Request Number: This a global variable automatically assigned by the system using the next available number upon creating a new service request.</p> <p>Note: The first WO number used can be chosen in Setup: Company Config: CustSrv</p>
Req Date	Automatically defaults to today’s date however it can be changed if desired. This date is important and determines the aging of a request.
Type	Categorizes the work order by: (W) alkthrough, (S) ervice, (E) mergency, or any other type of request that you have created (see page 7 to add your own).You will be able to create certain reports by using this type code.
Rep	The Service Representative who is responsible for the work order which can be selected from the drop-down list.
	Note: The Service Reps shown in the list were entered during setup. See Page 7.
Enter	Type either a Y or N to indicate whether or not the homeowner has given permission to enter the property.
Items	Will automatically fill with the number of items in the work order. This is derived from the number of items entered. To enter items go to page 16.
Sched Dt	Schedule Date is the estimated <i>completion date</i> that the representative has scheduled the work to be completed by the subcontractor.
Complete	The actual date when all of the items in the work order have been completed.

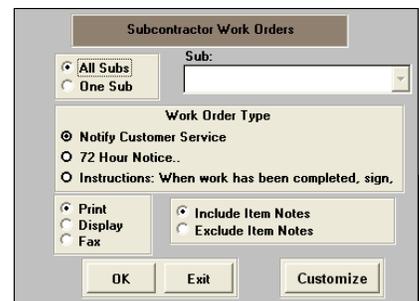
Notes	Can be used to make specific notations concerning the work order.
Comments	<i>Notes to the Subcontractors</i> that are printed on the work order.
Committee Report	Allows you to isolate specific problem requests for the committee report. Enter Y in the Committee Rep column to flag each specific item. To print select from the main menu Reports: Customer Service Reports: Committee Report .

- Once the request date has been entered you will be ready to add **Items** to your work order. Select the **Items** button to do this. For detailed instructions refer to page 16.
- Use the **Byr Note** (Buyer Note) button to record any notes that pertain to the homeowner. Select this button to either view or to add new notes.

Note: This button will turn *red* if any buyer notes exist.

- By highlighting a particular service request and selecting the **W/O** button you can print Subcontractors' Work Order. Upon selection the following screen will appear:

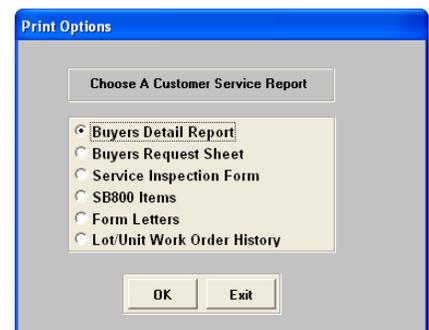
Select how you want the WO to print. Firstly select one or all subcontractors. Then select whether you wish to **Include Item Notes** or **Exclude Item Notes**. The **Work Order Types** allow you to select which notice you would like to print at the bottom of the work order. The **Customize** option allows you to change the verbiage. Select to **Print**, **Display**, or **Fax** the work order. Faxing will not work unless you have fax software setup. Please call Pharaoh Customer Support for more details.



Finally click OK to print or **Exit** to cancel and return to the **Buyer Service Request** screen.

- Selecting **Print** provides the user with the ability to print several different reports including buyer follow up letters. These are listed on the screen to the right. Select your desired report.

Each type of report comes with its own set of choices and selections as to what information you would like your report to include.



- The **Letter Trak** button displays the letters that have already been sent to the homeowner. An actual date can be entered when the letters are mailed. You also have the option to **send** one again if required.
- To save new entries in the Buyer Service Request screen, press **Save**. To erase a work order, select it and press the **Delete** button. **Exit** will close the Buyer Service Request screen and prompt you to save any changes. Select **Yes** to save and exit or **No** to exit without saving.

Note: Delete should be used with caution. No requests should be deleted once a work order has been issued for that request.

If all the items have been given a completion date, upon exiting, the system will prompt you to enter a completion date for the request. All the items for one service request can be marked as completed by keying in a date in the **Complete** column on the service request screen.

Adding ITEMS to a Service Request

To add specific items to a service request which will then generate your work order you must select the **Items** button from the **Buyer Service Request Screen** (page 13). The following **Item Entry Screen** will appear.

The screenshot shows the 'Service Request Items' window. At the top, there are fields for Job (BR01), Tract (93191), Lot (02), Buyer (NUWIPROS), Full Name (MR. NUWIPROS), Address (456 Skyview Ln, Cola de Casa CA 91433), Plan (1), and Closed (01/15/2000). On the right, there are fields for Div (03), Proj (BR0), Home Phone, Work Pln1, Work Pln2, Fax, Cell 1, Cell 2, and Color Scheme. A table below contains the following data:

Item #	Trade	Sub	Discrepancy	Room	B/Chrg	Amount	Recv'd On	Sched Dt	Compl Dt	SB800	Item D
001	APPL	GE001	APPL	2nd Room		0.00	12/21/1999	/ /	/ /		This is
002	CARR	ABC003	CAB1	3rd Room	Y	-350.00	01/20/2000	/ /	/ /		You co
003	ACCE	JJB	CAB2	5th Room		0.00	01/20/2000	/ /	/ /		This is

At the bottom of the window, there are buttons for Save, New, Delete, Notes, Add Sub, W/O, Add PO, Edit PO, SB800 Letters, and Exit. A 'Request #' dropdown menu is set to 000031.

Select **New** to add a new item to the service request number on the bottom right of the screen. Using the **Columns Defined** chart below as a guide enter the pertinent information for each item in the respective columns.

The information in these columns will appear in your subcontractors work order.

Item entry columns defined

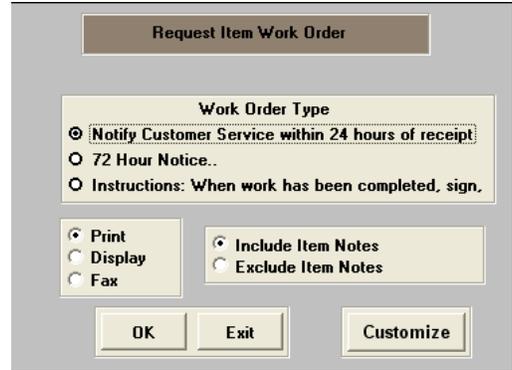
Item #	Incrementally increases as each item is added to this request.
Trade	Select a trade for the item by clicking the Trade field and selecting it from the drop-down list. The trade codes found here can be edited from the Setup: Subcontractor Trade Codes: Subcontractor Trade Codes menu.
Sub	If a subcontractor is assigned to the selected trade, the subcontractor code will automatically appear in this field. Otherwise, select a subcontractor from the drop-down list. This field can be changed if the subcontractor is not correct or another one will be used for <i>this</i> work order. This list should also include any internal people that for some reason may require a work order.
Discrepancy	Here you will find the drop-down list of discrepancies by trade. This will be used for further analysis and reporting for each phase. You may add or edit a category in the customer service setup menu. (see page 8)

Picture	This function allows you to insert a picture of the problem item to store in your database as reference.
Room	From the dropdown list select the room where the service item is located. To setup the list of rooms go to page 8.
B/Chrg	If the subcontractor selected for the work order is not the subcontractor that did the original work in the project, or if they were responsible for the problem, a Backcharge may be required. (please refer to page 20 for detailed instructions). A backcharge is a credit purchase order.
Amount	If there was a charge from the subcontractor to do the work you would enter it here. Any Backcharge totals/entries as per previous column will automatically appear here.
Recv'd On	Defaults to the date of entry of the line item, this is the date that this item was received as part of the current service request. This date can be changed.
Sched Dt	This is the date the subcontractor is scheduled to do the work. This will be used to print a Scheduling Report for each subcontractor assigned.
Compl Dt	Subcontractors date of completion. This field is critical to any aging reports and determines whether or not items are still open or active.
SB800	Allows you the flag a service request item as an SB800 item. This will allow you to track this item to comply with the SB800 regulations (for Californian homebuilders only). For more information please refer to Appendix 1 on page 25.
Item Description	A short description of the work to be performed. This can be up to 100 characters in length and is used to describe the nature of a problem. This will print on the work order and other detail level reports.

There are also other buttons in the **Items** screen that you need to be aware of.

Call FollowUp	Located above the SB800 column this button gives you access to the call history/follow up screen as described on page 25 under Tracking and Scheduling Phone Calls.
Delete	Allows you to delete the highlighted/selected line item from the request and returns you to the Buyer Service Request screen.
Notes	Use this to record any information pertinent to an item.
Add Sub	Allows you to add a new subcontractor on the fly. Note: only personnel with the appropriate security settings to add subcontractors will be able to access this screen.

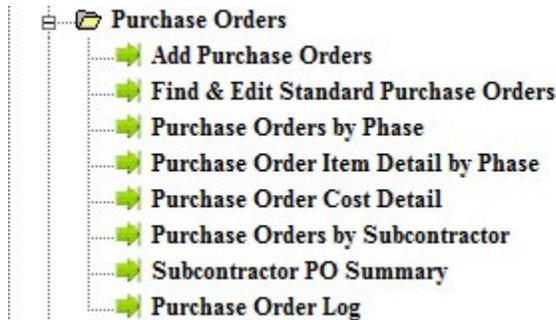
<p>W/O</p>	<p>Allows you to print a single work order for the specific item that you have highlighted. (Normally you will print work orders from the service request screen so that all the items for the same sub will be included on the same work order.)</p> <p>All <i>Work Order Types</i> print the same Work Order however with the verbiage of your choice.</p> <p>Select whether to <i>Include Item Notes</i> or <i>Exclude Items Notes</i> and whether or not you want to Print or Display the work order. After the report has been printed click Exit to return to the <i>Item Entry Screen</i>.</p>
<p>Add PO</p>	<p>This button will generate a purchase order referencing the service item that is selected. See section below for details.</p>
<p>Edit PO</p>	<p>This button allows you to edit an existing purchase order.</p>
<p>Exit</p>	<p>You will be prompted to save before exiting. Either of these will take you back to the main <i>Buyer Service Request</i> screen.</p>



Upon exiting the *Items* window you will be returned to the main *Service Request* screen. Here you will notice that the number of items will have automatically been tallied for the service request in the *Items* column.

Purchase Orders

Within the Customer Service module you can now create two specific types of Purchase Orders (or Back Charges). One is a standard lot specific or non lot specific (direct/indirect) purchase order, and the other is tied directly to a service request item and is created from within the Items screen as described on page 16. Below is an image depicting the menu system for the standard Purchasing Orders section of the Customer Service Module. Each menu item will be defined in the following section.



Adding a Standard Purchase Order

There are two categories of Purchase Orders that can be created. These are; *Lot Specific* – for PO’s that relate to only *one* specific lot, and *Non Lot Specific* – for PO’s that relate to *all* lots in a particular phase.

Select **Service: Purchase Orders: Add a Purchase Order** from the main menu. Once you have selected the phase and lot (if non lot specific do not choose a lot at this time) the above screen will appear.

Note: Both the lot specific and non lot specific screens are identical.

- To add an item to the P.O. it is best to start with selecting the appropriate **vendor** or subcontractor. This is done using the pull down list at the top left-hand corner of the screen. Select **New** from the bottom of the screen to begin adding your Purchase Order items from this particular vendor. You will notice that the *Qty*, *Cost*, and *Total Amount* columns will automatically fill with '0' value. Enter all the pertinent information for each specific Purchase Order item that you want to order through this vendor. Use the chart below as a guide.

Purchase Order main screen columns defined

Qty	The number of items you wish to order.
Unit	The unit of measurement for the particular item.

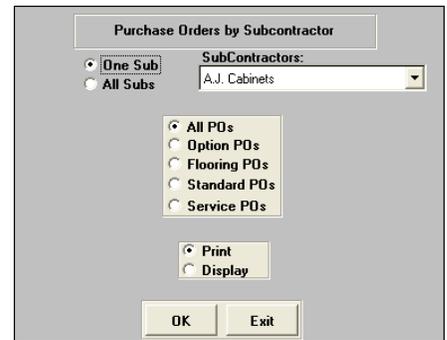
Item/Product	A description of the item and/or product you are ordering.
Cost	The cost per unit or item.
Total Amount	This is filled in automatically and is calculated by multiplying the quantity of items purchased by the total cost per unit.
Notes	To add additional notes or information regarding that particular item. The field will be highlighted in red if any notes are entered.
Cost Code	This is used to accurately assign this item to the appropriate category for exporting purposes to your back office accounting software (if applicable).

2. To print or display your PO select the **Print** button
3. A backcharge is a credit purchase order. To backcharge an item select the **Bk Chrg** button. A window similar to the main PO screen will open. Follow the same procedures to add items and/or products to backcharge as is outlined in section 1 at the top of the page.
4. To save new PO's or backcharges select **Save**. To erase a particular item select it and then press the **Delete** button. **Exit** will close the PO screen but will always prompt you to save any changes. Select **Yes** to save and exit or **No** to exit without saving.

Miscellaneous PO Menu Items

There are several menu items found under the **Service: Purchase Order** menu which are briefly described below.

1. **Find a Purchase Order:** Allows you to find your desired purchase order by PO number or to view a list of all PO's from all phases and projects. Purchase Orders by Phase: Speaks for itself.
2. **Purchase Orders by Phase:** Print or display a *Purchase Order Summary Report* listing and totaling the cost of each lot or non-lot specific purchase order and back charge per phase. You can also narrow down your selection by choosing either standard or service PO's only.
3. **Purchase Orders Cost Detail:** This selection prints (or displays) a report showing purchase orders sorted by the subcontractor trade code (cost code).
4. **Purchase Order by Subcontractor:** To print a selection of purchase orders sorted by either one or all subcontractors. The various PO options can be see in the screen below.



Customer Service Purchase Orders

The main difference between a standard PO and the customer service PO is that customer service PO's will reference the service request and item number on the actual Purchase Order whereas the standard PO's do not. Service PO's can also only be created from within the items screen of a buyer from where you can also edit them.

Back Charging a Subcontractor

Back Charges can either be made from the *Item Entry Screen* (Page 16) by selecting **Y**(es) in the **B/CHG** column or from any purchase order screen via the **BckChg** button. Selecting either of these will open the main back charge window and is pictured on the next page.

The *Project*, *Phase*, and *Lot* information will already be prefilled from the *Items Entry* window. Click on the down arrow in the **Subcontractor to Backcharge** field (on the top left) to select the subcontractor from the drop-down list. The subcontractors details will automatically be displayed.

Note: The list of subcontractors to back charge consists of all subcontractors in your subcontractor database.

Select **New** to add the line items applicable to the back charge specifying the *Qty*, *Unit*, *Item Description*, and *Unit Cost*. The total amount will automatically be calculated as a negative amount. The *Notes* column allows you to enter an extended description and the *Cost Code* column to chose the cost code to which the line item will be accounted.

Using the **Print** button to print or display either the *Intent to Backcharge* notice or the *Actual Backcharge*. If the backcharge is being created from within the *Items* screen or a Customer Service purchase order then the service request and item numbers will be referenced on to top right hand corner of each document.

After saving and exiting you will return be returned to either the main *Item Entry Screen* or the purchase order from where you generated the back charge.

Batch Fax Work Orders

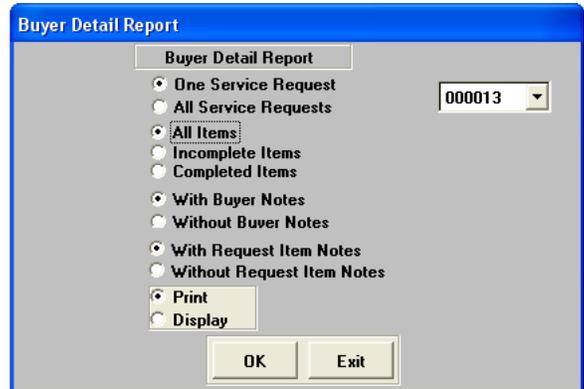
If you have the batch faxing add-on activated then it is from the **Batch Fax Work Orders** menu item that you will be able to bulk fax your work orders to your subcontractors. Please refer to the batch fax user guide for details.

Other Customer Service Menu Items

The following will explain some of the other items found in the Customer Service menu.

Print Buyer Request Detail

The Buyer Request Detail Report shows the list of service requests for a specific buyer. Some of the information included is the description of the request, the subcontractor, the scheduled and completion dates, and the date of the request.



Print Buyer Request Sheet

The Buyer Request Sheet is similar to the Buyer Request Report above, and although not as detailed it does include the billing amount.

Print Buyers' Subcontractor Listings

This is a very simple list showing the subcontractors responsible for any service request submitted by a specific buyer. This report is a warranty contact list which can be given to the buyer so that they can contact the subcontractor during the warranty period.

Buyer Letters

This menu item allows you to print *merge template* letters or documents that you created previously (see page 9). For detailed information about creating custom form letters or documents to your buyers please refer to page 10 under the subheading of Multiple Letters.

Buyer Mailing Labels

This menu item allows you to print mailing labels according to your selection criteria. Initially you will be able to narrow down your desired buyers by *Division*, *Project*, *Phase*, and *Lot* and then finally by visit date. Then, like in the Buyer Letters, you will be able to check which buyers you would like to print labels for.

Back Charges

This menu item does not allow you to create back charges. It only allows you to view, display, modify, or change existing ones. You can also print a back charge summary report. To create a back charge please see page 20.

Auto Warranty Letters

This option allows you to print any automated letters that are remaining to be sent but were not processed upon logging in. Please refer to page 11 for further instructions and details.



Buyer Listing

Prints a list of buyers sorted by project or by phase. This report includes all relevant contact details along with the sale and close of escrow dates.

Scheduled Calls

This menu item allows you to process any scheduled phone calls that were not previously processed. Please refer to page 25 for further instructions and details.

APPENDIX #1 - SB800 Service Request Items

The SB800 legislation has been effective since January 1, 2003 and establishes a mandatory process prior to the filing of certain types of construction suits. This bill currently applies to California only. Whenever there are defects alleged by a homeowner in new residential construction it ensures that any action against a builder, subcontractor, product manufacturer, or design professional is governed by a set of standards that has been set forth in the SB800. These standards comprise of a timetable set over a 300 day period which requires certain notification via letters, phone calls etc., with appropriate action to be taken at specific points during the timeline. In IBSWIN we have created a simplified yet effective way to handle these types of requests. *For more information please talk to your management.*

Tracking and Scheduling Phone Calls

From the main service request screen (and items screen) you can track and schedule telephone calls to your buyers, thereby ensuring you maintain contact with them when you need to and creating a history of calls made to them. To access this function in either of the screens use the **Call FollowUp** button.

Service Calls For				
Description	Date To Call	Date Called	Call Complete	Dialog
Call regarding service request #45	/ /	04/23/2003	<input checked="" type="checkbox"/>	Dialog
Call regarding SB800 item # 23	05/04/2003	/ /	<input type="checkbox"/>	Dialog

From the screen pictured you will see that this screen handles both the scheduling of calls to be made in the future and where you can log calls as you make them. To do either you begin by selecting **New** and entering a brief description of the call that was made (or is to be made) and using the **Dialog** button enter in any extended information about the call.

Scheduling Calls

Following from the previous paragraph, if the call you are entering is to be scheduled enter a date in the **Date To Call** column. This will trigger a popup window similar to the automated letters letting you know that you have a call to be made. If you choose to process these then the system will generate a **Call Worksheet** listing all the calls that need to be made. This worksheet includes who to call, their contact details (including phone number), what the call is about, and the extended dialog information. As each call is completed you will need to go back into the buyer record and into the **Call FollowUp** screen and put a checkmark in the **Call Complete** field, otherwise you will continue to be prompted to make this call each time you logon.

If you just made a call and wish to log it then once you have entered the details pertaining to it all you need to do is check the **Call Complete** column. Doing so will automatically update the **Date Called** field with today's date. This date can be overridden if need be.

The **Delete** button will delete the selected call/item and the **Print** button will allow you to print the call history for this buyer.

Flagging a Service Request item as an SB800 request

In the item screen (which lists all the items pertaining to a service request – see page 16) there is an SB800 column that can be checked to mark it as an SB800 item.

Call FollowUp				
cv'd On	Sched Dt	Compl Dt	SB800	Item Description
/15/2002	/ /	/ /	<input type="checkbox"/>	FIX MICROWAVE
/15/2002	/ /	/ /	<input checked="" type="checkbox"/>	REPAINT CABINETS
/15/2002	/ /	/ /	<input type="checkbox"/>	wires cut

Doing so will allow you to track all SB800 items using the Print button from the main service request screen. This report can also

be printed by phase from the **Reports: Customer Service Reports: SB800 Items Report**

SB800 Automated Letters

Automated letters for SB800 items can now be setup similar to how you would with the standard warranty letters as described on page 11. The main difference here is that it will only be sent for the items checked marked as SB800 (see previous section) and these letters are tracked separately and can be viewed from the items screen using the **SB800 Letters** button. The associated screen will list all SB800 automated letters that have been sent for this buyer.

During the setup of your SB800 letters found under the **Setup: Customer Service: Automated Letters: SB800 Letters** menu you will schedule your letters according to the timeline or correspondence outlined in the SB800 legislation. Please talk to your supervisor for more information.

Note: Make sure that when you schedule your letters that you account for post/shipping time.

Warranty Surveys

Seq#	Question Text	Response Type	Menu	System
01	How many walk thru items did you find?	Menu Only	Menu	Service
02	How quickly were the walk thru items resolved?	Menu Only	Menu	Service
03	How has telephone support been?	Menu Only	Menu	Service
04	On a scale of 1 to 4 -- how do you rate us?	Menu Only	Menu	Service
05	Do you like your service rep	Menu Only	Menu	Service

Customer Service Warranty Surveys information for your homebuyers can be tracked and recorded from within IBSWIN. The questions/information that you want to use can be setup from the Surveys menu item under **Setup: Customer Service**.

In this screen you will be entering your homebuyer survey questions. Simply by selecting **New** enter the *Question Text* and then select the *Response Type*. You have 3 options to choose from: Menu + User Entry, Menu Only, User Entry Only. Menu means that you have menu items to select from and

User Entry menus that there is an extended answer that cannot be defined by a menu option. Select the appropriate option for the type of answers or responses the question requires.

If you selected a Request Type with Menu in it then select the Menu button in the 4th column and you will now be able to enter the menu items (answers). Using a Menu response allows you to do a better analysis of your homebuyers.

The print button will allow you to print your list of questions and the associated menu responses.

Answer Seq	Answers
01	Less than 5 items
02	5 to 10 items
03	10 to 20 items
04	More than 20 items

Seq#	Question	Answer
01	How many walk thru items did you find?	Less than 5 items
02	How quickly were the walk thru items resolved?	0 to 15 days
03	How has telephone support been?	Excellent response on all calls
04	On a scale of 1 to 4 -- how do you rate us?	04 - Excellent
05	Do you like your service rep	He's a jerk

On the homebuyer side, in the buyer service request entry screen, you will see a button “Warranty Survey” that will display the questions and answer menu that you have entered in the setup area above. For each homebuyer you can enter their responses to you customer service survey.

In the Reports – Customer Service Reports selection, you now print out the Warranty Survey reports for the desired phase or project.