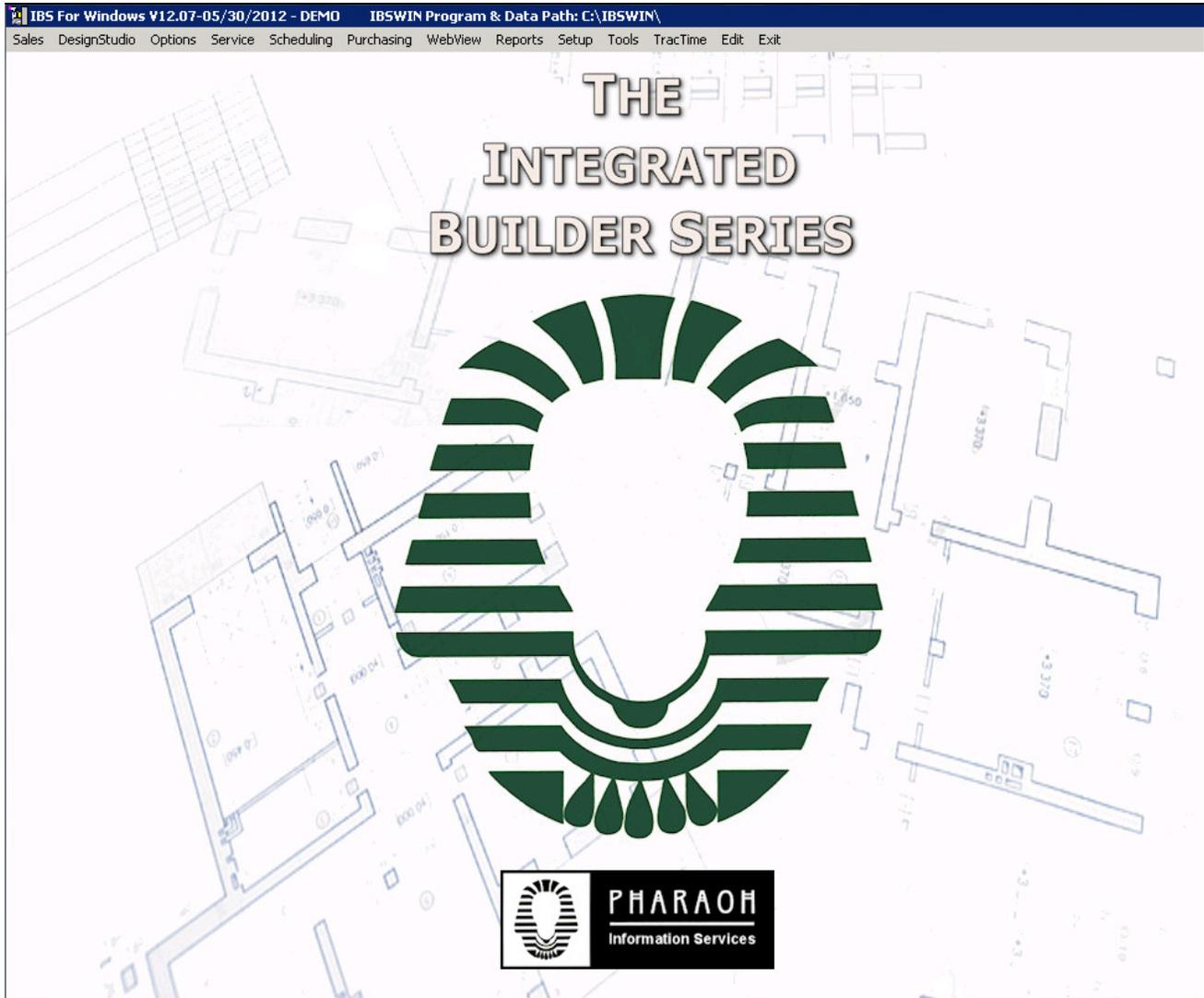


# *IBSWIN Design Studio*

(Version 12.XX)

## Expanded User Guide



Pharaoh Information Services, Inc.

Phone: (866) 813-0398

Fax: (949) 748-5142

[www.IBSWIN.com](http://www.IBSWIN.com)

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Document No. IBS-8.7-061299-CS

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**Phone: (866) 813-0398 • Fax: (949) 748-5142**

**Departmental E-mail Contacts:**

Sales: [sales@ibswin.com](mailto:sales@ibswin.com)

Customer Support: [support@ibswin.com](mailto:support@ibswin.com)

General Information and Assistance: [info@ibswin.com](mailto:info@ibswin.com)

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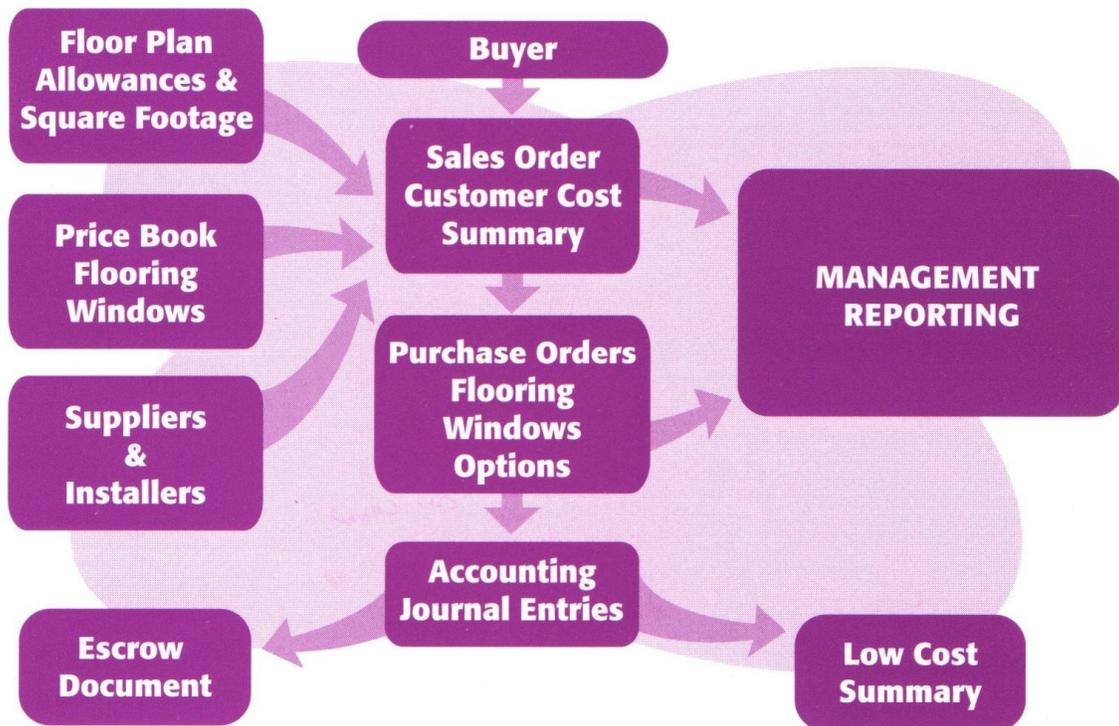
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## Introduction to Design Studio

*Design Studio* assists your designers from the moment they sit down with the home buyer on the initial discussion through the final flooring and window covering selections. This system completely automates the intensive and time consuming paper process from start to finish by generating accurate flooring, options, and window orders. The database is comprised of pricing, suppliers, installer information, allowances and other vital data, which is used to generate orders.

### DESIGN STUDIO FLOWCHART



### Automated Ordering

Auto-generation eliminates Sales Order and Purchase Order typing, and the loss of revenue due to outdated or incorrect pricing or mistakes in calculating.

### Plans

Room and window descriptions, square footage, and builder's allowances for each floor plan are maintained on the system eliminating the need for your designer to do calculations since this program interfaces with the price book and does the price extension automatically.

### Price Book

All current flooring, window, and option prices are maintained in an integrated database to improve pricing accuracy.

## Prices

---

Auto mark up feature makes price changes easy and speeds up initial cost and price set up.

## Purchase Orders

---

It provides automatic generation of Purchase Orders from original input flooring orders and window orders with a push of a button.

## Sales Orders

---

System produces a hard copy Flooring and Windows Sales Order for customer to sign.

It allows you to create multiple "what if" scenarios for each customer while they try different combinations of flooring and/or window covering selections. Each scenario is kept in the system until your customer finalizes their order.

## Escrow Document

---

It produces all appropriate information including Journal Entries in a final report for the accounting department.

## Management Reports

---

Lot analysis Summary Report by product with profit and profit percentage.

Average Sales per house by product including the average sales by product.

Produce YTD average sales per house by Designer/by Product.

***Design Studio*** greatly increases your staff's productivity and output. Orders, whether they are customer flooring or windows orders or supplier purchase orders, are generated in minutes not hours.

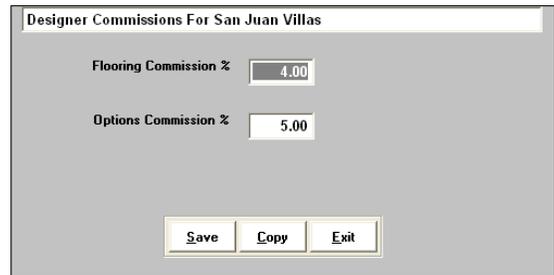
***The Design Studio*** system allows your designers to spend more time with the home buyers and less time with their calculators - in fact, they won't even need a calculator anymore.



## Setting Up Designer Commissions

This screen is used to setup the commission rates that will be used to calculate commissions for your designers. *These are used to generate the Designer Commission report.*

From the main menu select **Setup: Design Studio: Designer Commissions** to review and modify the Designer Commissions for your desired project. Simply enter the desired percentage amount for either options or flooring. The **Copy** function will copy the commissions from one project to another.

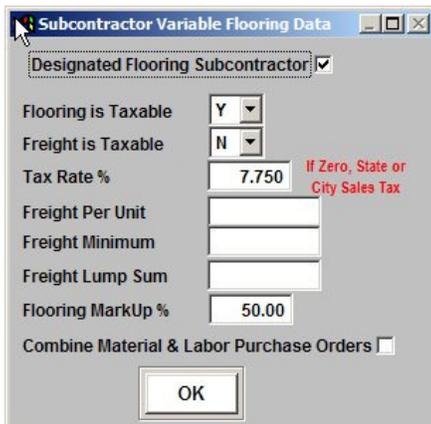


**Note:** This screen can only be edited and viewed by designated personnel if the appropriate security settings are active.

## Subcontractor Related Setup (Defining Price and PO variables)

By going to **Setup: Subcontractors**, you can specify whether or not a subcontractor is a Flooring and/or Windows subcontractor/vendor. You will also be able to specify subcontractor/vendor specific information such as the markup percentage for any product/s that they supply along with other variable information.

COL001	COL001	COLOR TILE	CERA	5544 GRO
COL002	COL001	COLOR TILE	CORN	5544 GRO
COL003	COL001	COLOR TILE	COUN	5544 GRO
CRA001		CRAIG'S CONCRETE	CONC	6515 JAM
CRA003	CRA001	CRAIG'S CONCRETE	CONP	6515 JAM
CS		CUSTOMER SERVICE	CUSR	
CCR		CUSTOMER SERVICE	CUSR	



### Setting Up a Flooring Subcontractor

To flag a subcontractor for flooring you will need to select the **Flooring Setup** button and check the appropriate box. In this screen you can also define whether or not the flooring and/or freight is taxable, the tax rate (if any), the default markup % for any products supplied by that subcontractor, and whether or not you want to combine their material and/or labor PO's if applicable.

**Please note:** It is possible to configure IBSWIN to combine the Material and Labor PO's for all your subcontractors in the *Company Config* screen which is found under the main **Setup** menu.

### Setting Up a Windows Subcontractor

To mark a subcontractor for windows you will need to select the **Windows Coverings** button and check the appropriate box. From here you can also define the default markup percentage for any window related products that this subcontractor offers.

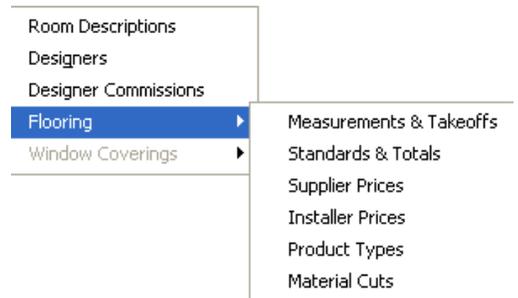


## Flooring Specific Setup

This section will walk you through the remaining setup of the Flooring module. Most items are setup by phase but can be copied from one phase to another to minimize redundant data entry.

### Getting Started

Before starting, it is important that you have the measurements and take-offs by room for each plan, along with the suppliers products and prices by SqFt/Yd. Additionally you must know what your standard products and allowances are (if applicable). In IBSWIN allowances are calculated either by room or as a lump sum subtracted from the total order (please see pages 10 & 15 for more information).



**Important!** – When setting up flooring for the first time please follow the sequence outlined in this guide to ensure you get the best results. For instance, Product Types must be defined before you can properly input the Measurements and Take Offs.

## Setting Up Product Types

From the main menu select **Setup: Design Studio: Flooring: Product Types**. Here you will define the list of product types that you offer. To add new product types select **New** and then enter a unique code for your new product type.

**IMPORTANT!** Your *Product Type* code must not start with C, W, V, or T unless the product type you are entering is an additional Carpet, Wood, Vinyl, or Tile related product. See the **Special Note** below for more details.

After defining the code, enter the *Product Description* and the standard unit of measurement used for it (e.g. SqYd for carpet or SqFt for hard surfaces). The *Material* and *Labor Trade* columns allow you select the trades (as setup defined in IBSWIN) that pertain to the material and or labor subcontractors. This will help create a short list of subcontractors (those that are assigned to the trades) in the flooring module and ensure that if you are exporting PO's to accounting that they will export correctly.

When you have completed the setup, use the **Save** button to save your changes or **Exit** if you do not want to save. To change the name of an existing product type all you have to do is type over the description.

**Special Note:** When a flooring order is printed, the order will recap the four main categories of product: *Carpet, Tile, Wood, & Vinyl*. If you would like to have other hard surface items (Granite, Stone, Marble...) included as part of those main categories then you can do this by adding a leading **T** to the product *Type* code. This will then include these items under *Tile* in the recap with its own description. The same concept applies to the **W** and **V** codes as well. Please be aware that if you change your product codes midway through a project/s it will only work on a *go forward* basis unless you change your current orders. It is recommended that you implement this feature on a new phase or project to be consistent with your flooring orders.

Type	Product Description	Unit	Material Trade	Labor Trade
	NO MAT'L			
C	Carpet	SqYds		
L	Laminate	SqFt		
PAD	Pad	SqYds		
S	Stone	SqFt		
T	Tile	SqFt		
TG	Granite	SqFt		
TM	Marble	SqFt		
TP	Porcelain	SqFt		
TS	STONE	SqFt		
V	Vinyl	SqFt		
VT	TILE	SqFt		
W	Wood	SqFt		

Buttons: New, Delete, Exit

## Setting Up Measurements and Take Offs

If the room descriptions have been entered correctly (page 7), along with your product types (page 9), then the measurement and takeoffs can be added for each plan/room. It is here that you will define the standard product type for each room, along with other material types available, and how much material is required.

To enter this screen, go to **Setup: Design Studio: Flooring: Measurements and Take-offs** and specify the phase. When the screen opens you will see the list of **Room Areas** as per the **Room Descriptions** screen. Before entering your measurements (and any takeoffs) select the plan you wish to modify by using the arrow key found on the bottom left corner (**Current Plan**). Then for each room input the information as applicable.

Area	Opt Rm	Mtrl	SqYd	Hard Surface	Wood	6' Vinyl	12' Vinyl	Allowance	Std Deduct	
Front Entry	<input type="checkbox"/>	T	0.00	32.00	32.00	0.00	0.00	0.00	0.00	
Hallway1	<input type="checkbox"/>	T	8.00	48.00	48.00	50.00	52.00	336.00	0.00	
Bathroom 1	<input type="checkbox"/>	Y	6.00	38.00	38.00	39.00	39.00	195.00	0.00	
Dining Room	<input type="checkbox"/>	W	12.00	62.00	62.00	0.00	0.00	589.00	0.00	
Living Room	<input type="checkbox"/>	C	15.00	76.00	76.00	0.00	0.00	135.00	0.00	
Family Room	<input type="checkbox"/>	C	12.00	62.00	62.00	0.00	0.00	108.00	0.00	
Kitchen	<input type="checkbox"/>	T	10.00	56.00	56.00	45.00	45.00	392.00	0.00	
Nook Area	<input type="checkbox"/>	T	4.50	32.00	32.00	25.00	25.00	224.00	0.00	
Stairs	<input type="checkbox"/>	C	10.00	58.00	58.00	0.00	0.00	90.00	0.00	
Bedroom 1	<input type="checkbox"/>	C	9.50	54.00	54.00	0.00	0.00	85.50	0.00	
Bedroom 2	<input type="checkbox"/>	C	10.00	58.00	58.00	0.00	0.00	90.00	0.00	
Master Bedroom	<input type="checkbox"/>	C	17.00	85.00	85.00	0.00	0.00	153.00	0.00	
Master Bathroom	<input type="checkbox"/>	C	10.00	59.00	59.00	49.00	49.00	90.00	0.00	
Bonus Room	<input type="checkbox"/>	C	14.00	73.00	73.00	0.00	0.00	126.00	0.00	
Study	<input type="checkbox"/>	C	9.80	56.00	56.00	0.00	0.00	88.20	0.00	
Totals:				147.80	849.00	849.00	208.00	210.00	2701.70	0.00

The **Mtrl** column is used to define the standard product type that will be installed in that room if no upgrades are ordered. The actual product itself will be defined in the **Standards and Totals** screen (page 15). Then the following columns (**SqYd**, **Hard Surface**, **Wood**, **6'** and **12' Vinyl**) require the total square measurement (footage or yardage) of each product type that is offered in that room.

**Note:** If you leave any of the measurement fields with a zero then IBSWIN will assume that you are not offering products for that particular product type in that room. For example, if you are not offering carpet in a bathroom then the measurement in the SqYd column should be zero.

The **Allowance** column is used to enter a lump sum allowance amount for that room. This allowance will be deducted from the buyers order if they **upgrade** from the standard product.

The **Std Deduct** is the lump sum amount of carpet for a specific room that is to be deducted from the optimal cut measurement (as entered in the Standards and Totals screen - see page 15). This column is for standard carpeted areas only and reduces the amount of carpet ordered as long as only one style/color/type of carpet is ordered throughout the entire house. For example, if a room that has carpet as a standard is changed to have tile instead then the **Standard Deduct** measurement will be deducted from the total the optimal cut measurement so that less carpet is ordered. If more than one color or style of carpet is ordered IBSWIN will then use the individual room measurements to calculate the amount of carpet required.

### Defining/customizing the room list for each plan (including optional rooms)

If no measurements or standard material type (**Mtrl**) is entered for a specific room then IBSWIN will assume that the room does not exist for that plan. Therefore, in the ordering screen that room will not be displayed. This is how IBSWIN knows which rooms are applicable for each plan.

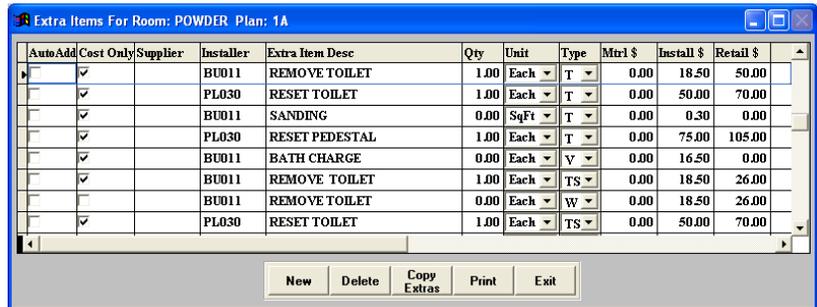
There are two ways that IBSWIN handles optional rooms. One way is that when a designer goes into the order screen, the screen will show all the valid rooms, including any optional ones. The designer would delete the ones that are not applicable. For the rooms to work this way the **Opt Rm** check box should not

be checked. The other method is using the **Opt Rm** column. By checking off all the optional rooms for any given plan, the IBSWIN system will exclude those rooms when the designer enters the ordering screen. Rooms then can be added or deleted any as necessary. Please refer to page 23 for details.

**Creating Room Extras** (for additional labor and material charges)

The **Extras** button is used to add any extra or miscellaneous costs that may need to be included in a specific room. Extras are setup by product type and will included in the order if the designer adds it when prompted in the ordering screen or will do so automatically if the **Auto Add** column is selected.

To add an extra select **New** and a new line will appear. Then select if it needs to be added automatically (as per above) and whether or not it is to be **Cost Only**. A cost only extra will not print on the buyers order but will be added to the applicable PO’s. Any cost only extra should have a retail price of zero! This setting can be used for additional charges such as toilet resets, sanding, etc.

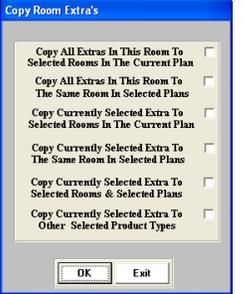


A **Supplier** and/or **Installer** only needs to be selected if they are different from the default ones that will be used for the floor covering that was ordered for the room. If the quantity (**Qty**) is left blank then IBSWIN will automatically use to the quantity/measurement entered for that room/product type. The remaining fields should be completed as necessary. If extras exist for a specific room then the **Extras** button will be highlighted in red.

**Please Note:** Extras can also be setup by product or can be added while working on an order from within the flooring order screen (see pages 14 & 24).

**Measurements and Takeoffs buttons described**

<b>Move All Hard Surface to Wood</b>	Use this button to automatically copy all <b>Hard Surface</b> measurements (for ALL rooms) to the <b>Wood</b> column.
<b>Plans</b>	This button allows you to view the plans that have been setup for the phase that you are currently in. It is mandatory that the plans for each phase be setup consistently within the same project. Please refer to the Setup and Configuration User Guide for more information.
<b>Extras</b>	Please refer to <b>Creating Room Extras</b> in the section above.
<b>Print</b>	Use the <b>Print</b> button to print the <b>Flooring Measurements</b> information for each plan as setup in the current phase.

<p><b>Copy</b></p>	<p>The <b>Copy</b> button will copy all extras for a room to another phase, project, plan, or even to multiple product types in the same room.</p>	
<p><b>Exit</b></p>	<p>The <b>Exit</b> button will prompt you to save your changes and exit the screen.</p>	

## Setting Up Your Product Catalogue

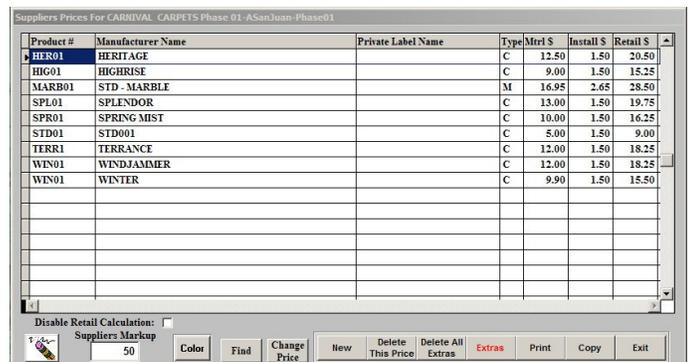
Before setting up your flooring products there are a few concepts that you need to understand that may influence how this will be done. In IBSWIN flooring products are input for each supplier/manufacturer by phase. To simplify this process, rather than inputting and maintaining the same products (including cost and prices) in each construction phase we devised the **Master Flooring Phase concept**. In essence, this allows you to setup your products in one phase and use it as a master product list that can be assigned to as many construction phases as necessary. You may designate as many Flooring Master Phases (or product catalogues) as you find necessary.

Some clients will use their existing construction phases as their Master Flooring Phase and others will setup a unique project (called Flooring Price List as an example) and then each phase setup in that project will represent each pricelist and is named accordingly. Generally, the number of Master Flooring Phases you need will be determined by whether or not your company is doing flooring orders in house (for houses built by your company) as opposed to doing flooring orders for other/multiple homebuilders (i.e. your company is a contracted design center). If you are working with multiple homebuilders you will probably have a master price list for each builder, *otherwise* it would be determined (more or less) by the different installers you use. If you have any questions please call Pharaoh.

Therefore, before you setup your products you will need to make sure you have a phase that will eventually be designated as a Master Flooring Phase. If you do not know how to setup phases please refer to our Setup and Configuration User Guide. Once the phase is setup you will be able to enter your products and use this phase as a Master Flooring Phase which is explained on page 14).

### Setting Up and Maintaining Products (Supplier Prices)

To begin setting up products (or to maintain costs and prices for existing products) you will need to go to **Setup: Design Studio: Flooring: Supplier Prices**. Then you will need to select your **Master Flooring Phase** and the supplier.



Product #	Manufacturer Name	Private Label Name	Type	Mtrl \$	Install \$	Retail \$
HER01	HERITAGE		C	12.50	1.50	20.50
HIG01	HIGHRISE		C	9.00	1.50	15.25
MAR01	STD - MARBLE		M	16.95	2.65	28.50
SPL01	SPLENDOR		C	13.00	1.50	19.75
SPR01	SPRING MIST		C	10.00	1.50	16.25
STD01	STD001		C	5.00	1.50	9.00
TERR1	TERRANCE		C	12.00	1.50	18.25
WEN01	WINDJAMMER		C	12.00	1.50	18.25
WIN01	WINTER		C	9.90	1.50	15.50

When first entering this screen, look at the **Markup** percentage on the bottom left. This is used to automatically calculate the retail price for your flooring products.

To add a new product select **New** and enter a **Product Number** (if applicable) followed by the Product Description/**Manufacturer Name**. You can also enter a **Private Label Name** (if applicable). Then use the drop box to select the **Product Type** and enter the **Material** and **Installation** costs (per Sq Unit). IBSWIN will automatically calculate the **Retail** price by multiplying the **Material Cost** by the **Markup %** (located on the bottom left) and then adding the **Installation Cost**. *Please note that IBSWIN will round up the prices to the nearest \$0.25.* The **Markup** percentage displayed comes from the Subcontractor database but can be modified in this screen or if you do not want to use this function then you can input the **Retail Price** at any time by typing over the pre-calculated amount.

**Please Note:** If your retail price needs to include sales tax (by supplier or by project) and/or per unit freight, this can be activated from the Setup menu under Company Config. If you do this then the retail price will automatically calculate the relevant amount and include it in the retail price column. This function will only work if you let IBSWIN calculate the retail price automatically using the markup field.

If you choose, you can also specify the colors that the product is available in using the **Color** button. Any additional cost or items that need to be included when ordering the selected product can be added using the **Extras** button. *Please refer to the **Supplier Prices buttons defined** section below for more information.*

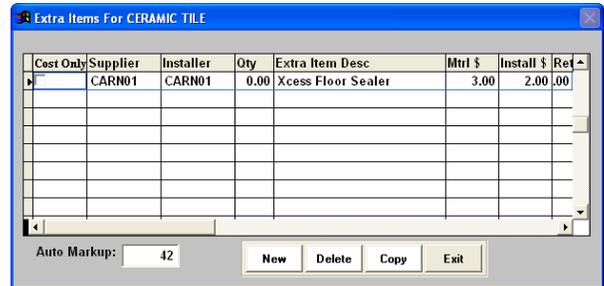
### **Setting Up Standard Products**

For any flooring products that are provided as a *Standard* for any given material type (i.e. carpet), make sure you have **STD** or the word **Standard** written prior to the **Manufacturer Name**. The retail price (**Retail \$**) should be **\$0.00**. By setting up your standards in this way the standard product will automatically be selected when you first enter the homebuyer’s initial order. *Please refer to **Setting up Standards and Totals** on page 15 for more information.*

### **Supplier Prices buttons defined**

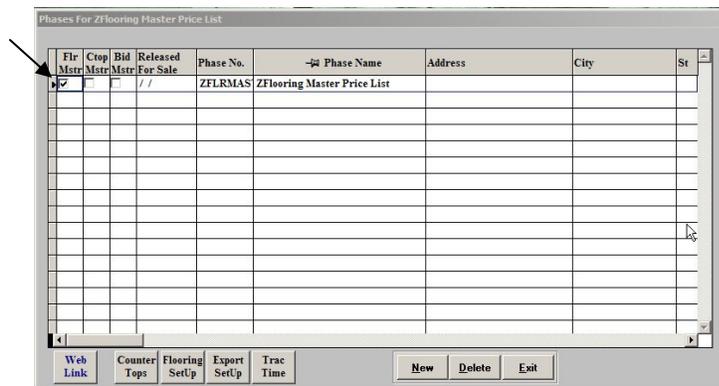
	This button will delete all the products for this supplier/manufacturer for the current phase you are in. Please use with caution!
<b>Color</b>	The <b>Color</b> button gives you the ability to enter the color selection (if any) for the selected product. At ordering time this will allow you to select the desired color from a drop down list for the product. The color button will be red if the selected product has color selections for it.
<b>Change Price</b>	Allows you to change a specific retail price amount in your price data
<b>Delete This Price</b>	This will delete the <u>selected</u> product from the list.
<b>Delete All Extras</b>	This button will delete any extras for the <u>selected</u> product.

<p><b>Extras</b></p>	<p>This button allows you to input any extra items that are required or to be included as part of the product selection. When ordering the product you will be asked whether or not to include the extra associated with it.</p> <p>To enter an extra use the <b>New</b> button and fill in the remaining columns. Any item marked as <b>Cost Only</b> will <u>not</u> print on the buyers order, only on the relevant PO/s. See the <b>Adding Extras</b> section on page 25 for more info.</p>
<p><b>Print</b></p>	<p>This selection allows you to print a <b>Supplier Pricing Report</b> which can sorted by product number, name, or label.</p>



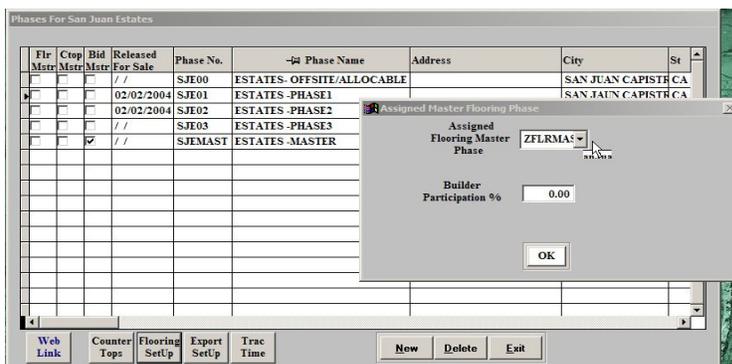
### Assigning Pricelists (Flooring Master Phases) to Phases

As described in the previous sections **Flooring Master Phases** are phases that are used as pricing templates or as a product/pricing catalogue. These “Master Phases” can be attached to your construction phases to minimize the redundant data entry required to maintain your product lists.



IBSWIN allows you to designate any phase as a Master Pricing Phase. You will need to go to **Setup:Inventory:Phases** and select the division and project that the flooring master phase has been assigned to. Find the phase you intend on being the Flooring Master phase and check the **Flr Mstr** box. This designates the phase as a Flooring Master phase.

After defining your master phases you will need to then assign the appropriate Master Phase to each of your construction phases. This is done under **Setup: Inventory: Phases**.



Click on the appropriate construction phase and use the **Flooring Setup** button to use the available drop-down box (as pictured) to assign the Flooring Master Phase.

**Please Note:** When a Master Flooring Phase is assigned to a particular construction phase, IBSWIN will now use

the products and prices in that Master Phase instead of any product or pricing that may exist in the actual construction phase. Generally, there is no need to ever setup products and pricing in a construction phase unless you intend on using it as a unique price list.

## Setting Up Installer Prices

The **Installer Prices** screen allows you to tell IBSWIN what product types or flooring materials are installed by your installers. It also allows you to setup any carpet related padding, if applicable, for that installer. Installer price records are normally set up for the construction phases.

To access this screen, select **Setup: Design Studio: Flooring: Installers Prices** followed by the phase and subcontractor/installer. Then, using the dropdown boxes provided, select the **Material Types** applicable for this

installer.

**Please Note:** If a material or product type does not appear in the dropdown list then they will need to be added from the Product Types screen. Please refer to page 9 for details.

If the selected installer/subcontractor installs carpet then the **Pad Products** button is enabled so that you are able to setup the pads that are offered. You can enter the **Thickness**, **Weight**, and the **Cost per Sq. Yd.** as per the screen to the right. The **Retail Price** is per Sq. Yd. and will be calculated automatically using the percentage shown in the **Auto Markup** field on the bottom left. You can override this calculation by typing over the price with your desired amount. Click **OK** when completed.

**Please Note:** If your subcontractor offers more padding than the 10 slots allotted in this installer screen, then you can create a Product Type of PAD or PD in the Product Type screen (page 9) and setup the remaining Pads in the Supplier Price screen (page 12). If you require more information, please call Pharaoh.

Thickness	Weight	Cost Sq/Yd	Retail Sq/Yd
1/8	2LB	1.25	1.75
2.0	3LB	1.50	2.25
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00

Back on the main **Installer Prices** screen you can use the **Copy** button to copy this information from one phase to another. When you have completed your entries use the **Save** button to save your changes or **Exit** to leave without saving.

**Important Note:** Please make sure that you setup at least one installer for each type of flooring product that is supplied for that phase to ensure that your install PO's will be generated correctly.

## Setting Up Standards and Totals

This screen is used to: 1) select the standard supplier, standard material, and installer for each standard surface type, 2) input the optimal cut of carpet required if one type of carpet is ordered throughout the house, and 3) specify any

Standard:	Carpet	Wood	Vinyl	Tile	Laminate
Supplier:	CARNIVAL	MARK & SC	COLOR TIL	COLOR TIL	COLOR TIL
Material:	STD001	STDWOOD	STDVINYL	STD TILE	
Installer:		MARK & SC	MARK & SC	MARK & SC	
Area measurement required for all rooms:	97.00				
		Padding Allowance:		250.00	
		Builder Flooring Budget Allowance:		0.00	
Current Plan:	10				



## Customizing the Order Screen and Buyers Order Report

The screenshot displays three sections of configuration options:

- ORDER SCREEN TOGGLES**
  - Order Screen Variables**
    - Hide Qty Column
    - Hide Price Column
    - Hide Gross Column
    - Hide Allow Column
    - Hide Total Column
  - Pad Product Column Variables**
    - Hide Weight.Desc Column
    - Hide Price Column
    - Hide Subcontractor Column
  - Material Cuts Column Variables**
    - Hide Factor Column
    - Hide Install Price Column
    - Hide Retail Price Column
- REPORT TOGGLES**
  - Default Buyer Flooring Order**
    - Hide Quantity
    - Hide Unit Price
    - Hide Gross Price
    - Hide Allowance
    - Hide Payments
  - Order Title
  - Disclaimer

As each Design Center has different requirements for the information that they want on the Flooring Order screen and the Buyers Order report there is a way to customize them from within IBSWIN to include and/or exclude specific information.

By going to the **Setup: Company Config** menu, selecting **Edit**, and then the **Flooring** tab, you will have the options pictured to the left available to you.

By checking the appropriate boxes, IBSWIN will automatically exclude various columns from the *Buyers Order* screen and the *Pad Selection* and *Material Cuts* screens. You can also do

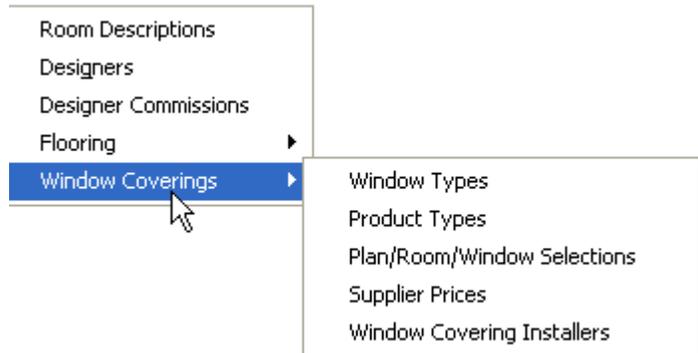
similar modifications to the Buyers Order\* including modifying its *Title* and changing the *Disclaimer* to suite your requirements. There is also a **PO Legal Verbiage** button in the same screen that allows you to customize your legal verbiage.

**Important Note:** Flags allowing customization of the buyers flooring order apply to the default standard flooring order report provided by IBSWIN unless otherwise requested in some user defined reports. Alternative versions of the flooring order report are available for a nominal cost.

## Window Coverings Specific Setup

This section will walk you through the remaining setup requirements for the Windows Coverings module. The sequence laid out in this user guide is important and will ensure that you get the best results out of the system.

Start by selecting **Setup: Design Studio: Window Coverings** and the following menu selections will appear.

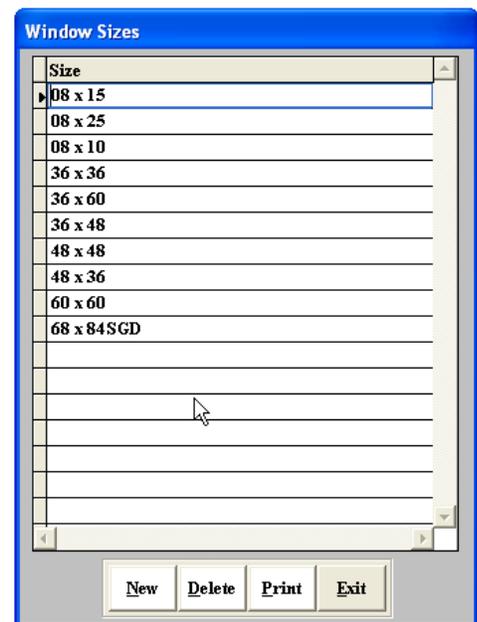


### Setting Up Window Types (Sizes)

By going to **Setup: Design Studio: Window Coverings: Windows Types** you can setup all the potential window sizes as illustrated in the screen pictured to the right. This will be used as a dropdown selection in the subsequent screens where you will add these windows to the specific rooms for each plan.

To add a new window size select the **New** button and enter the measurement. The **Delete** button allows you to delete a measurement, and the **Print** button will allow you to this list. **Exit** will exit this screen but not before asking you whether or not you wish to save any changes.

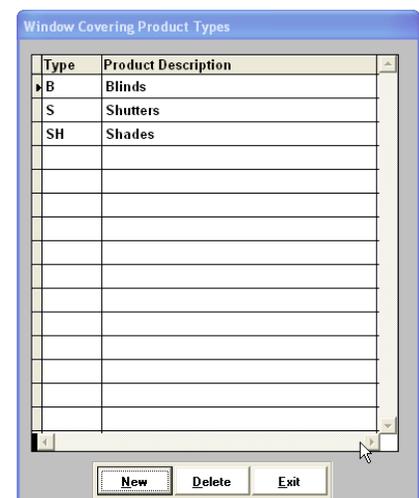
**Please note:** For the measurements to sort correctly make sure that you use leading zeros for any measurements that are using less than the maximum number of characters for the dimensions.



### Setting Up Product Types

Found under **Setup: Design Studio: Window Coverings: Product Types** this screen allows you to define the various window covering product types that you would like to setup and report on.

To add a product type use the **New** button, specify a code using a maximum of 3 characters and click on the **Add** button. A new line will appear in the screen where you can now enter a **Product Description**.



## Setting Up Plan/Room/Windows Selections

This screen is where you define the windows that are located in each room area. This list of rooms (with windows) comes from the **Room Description** screen as was setup on page 7.

To access this screen you will need to go to **Setup: Design Studio: Window Coverings: Plan/Room/Windows Selections**. When you first enter this screen each room will be listed for the **Current Plan** (as displayed on the bottom left of the screen). You change/modify the measurements for any plan by selecting it from the dropdown.

Room Area	W#	Window	W#	Window	W#	Window	W#	Window	W#	Window	W#	Window
Hallway1	11	8 x 10	12	8 x 10	13	8 x 10						
Entry	8	8 x 15										
Bathroom 1	1	8 x 15	2	8 x 15	3	48 x 36	4	36 x 36				
Dining Room	5	60 x 60	6	60 x 60	7	48 x 48						
Living Room	16	48 x 48	17	68 x 84 SGD								
Family Room	9	48 x 48	10	48 x 48								
Kitchen	14	36 x 36	15	8 x 15								
Nook Area	18	8 x 25	19	8 x 25	20	8 x 10						

Current Plan: 10

Elevation Exceptions Print Copy Exit

To specify which windows are in each room, click on the first available **Window** field and select the window size from the dropdown. If a room has more than one window go to the next **Window** field and do the same. If desired, each window can also be assigned a window number using the **W#** column. The window number will print on your orders and can make it easy to identify your windows if you use a numbering system for your plans.

**Important Note:** The **Elevation Exceptions** button is for any room area that might have different windows (either number of windows or size differences) for a specific elevation. Use this selection to enter all the windows in each room that is different for a specific elevation. To use this function, select the room and then the **Elevation Exceptions** button. A new screen will open and using the **New** button you can specify the elevation and setup all windows for that room (and windows number if applicable). Follow the steps as you would for the main screen.

The **Copy** button allows you to copy the windows for the current plan to other plans within this phase, and other phases too. This can save a lot of data entry time. The **Print** button will allow you to print the windows in each room as setup in this screen (including any elevation variations) and also a **Window Covering Price Sheet** by subcontractor as long as you have your products/supplier prices setup (see the next section of this user guide for more information).

## Setting Up Supplier Prices

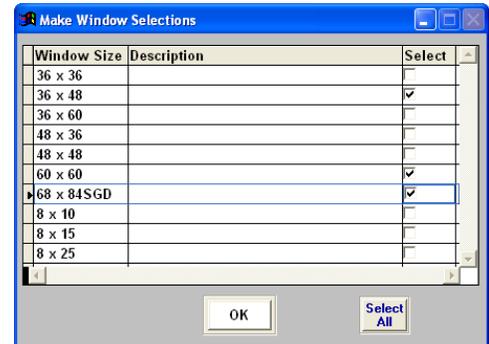
**Setup: Design Studio: Window Coverings: Supplier Prices** is where all of your window covering products, costs, and prices are entered by subcontractor. When entering this screen you will be asked to select the division, project, and window coverings supplier that you wish to setup the products for.

**Please note:** That the list of subcontractors that you can select from will only be those that are designated windows subcontractors (see page 8 for details).



Once in the main supplier price screen, use the **Add New Product** button to begin with the setup of the products offered by this subcontractor. Initially, you will be prompted to add a **New Product Code** a.k.a. **Product#** (which is not required), a **Product Name**, and finally to select a **Product Type** from the dropdown list.

Once you have entered this information another window will open. This window will list all the window measurements along with a checkbox next to each of them. Simply check-off which window sizes the product is available for. Then hit **OK** for the product to be added, by window size, into the main screen.



Finally, you will be able to enter the Material Cost (**Mtrl \$**) and Install Cost (**Install \$**) for each product. The Retail Price (**Retail \$**) will be calculated automatically using the **Markup** field located on the bottom left (as specified during the sub-contractor setup). If the amount is not accurate, you can change the percentage to recalculate the prices or override them by entering the correct price directly in to the Retail column.

Supplier Window Covering Prices For BERKUS GROUP Phase SJE01 San Juan Estates

Product #	Product Name	Window	Type	Mtrl \$	Install \$	Retail \$
ABC	ANEW PRODUCT	36 x 36	B -	500.00	0.00	750.00
ABC	ANEW PRODUCT	36 x 60	B -	600.00	0.00	780.00
ABC	ANEW PRODUCT	48 x 48	B -	750.00	0.00	975.00
ABC	ANEW PRODUCT	68 x 84SGD	B -	680.00	0.00	884.00
ABC	ANEW PRODUCT	8 x 15	B -	500.00	0.00	650.00
FWD	FAUX WOOD BLINDS	8 x 10	B -	389.00	0.00	505.75
FWD	FAUX WOOD BLINDS	8 x 15	B -	350.00	0.00	455.00
FWD	FAUX WOOD BLINDS	8 x 25	B -	375.00	0.00	487.50
FWD	FAUX WOOD BLINDS	36 x 36	B -	400.00	0.00	520.00
FWD	FAUX WOOD BLINDS	36 x 48	B -	475.00	0.00	617.50
FWD	FAUX WOOD BLINDS	36 x 60	B -	365.00	0.00	474.50
FWD	FAUX WOOD BLINDS	48 x 36	B -	550.00	0.00	715.00
FWD	FAUX WOOD BLINDS	68 x 84SGD	B -	760.00	0.00	988.00
334	MINI BLINDS	8 x 10	B -	133.00	0.00	225.00
334	MINI BLINDS	8 x 15	B -	125.00	0.00	200.00
334	MINI BLINDS	36 x 36	B -	220.00	0.00	286.00

Markup: 30

Buttons: Add New Product, Delete, Copy Prices, Print, Exit

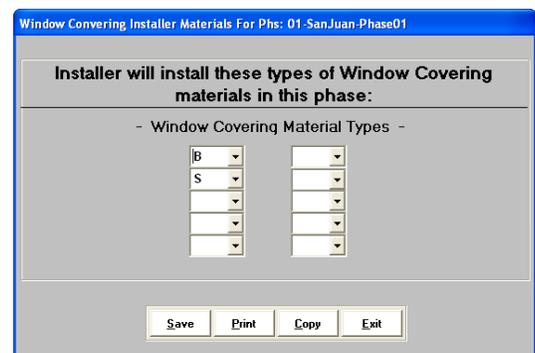
**Please Note:** If the same supplier is including the install cost with the product, simply enter the material and install cost as a combined amount and leave the install cost column at zero cost.

The **Copy Prices** button allows you to copy the products and prices for this subcontractor from project to project. The **Delete** button will delete the selected product, and the **Print** button will print out a **Window Covering Cost/Price sheet** for the Subcontractor.

## Setting Up Window Covering Installers

Go to **Setup: Design Studio: Window Coverings: Window Covering Installers** to complete the final step in the window coverings setup. In this screen you will assign the product types offered by each installer for each phase. The Copy button will allow you to then copy these selections from phase to phase.

**Note:** This only needs to be done if the installer in not the supplier for any given product type.



## Customizing the Order Screen and Buyers Order Report

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The screenshot shows two sections of configuration options:

- ORDER SCREEN TOGGLES**: A single checkbox labeled "Hide Price Column".
- REPORT TOGGLES**: A section titled "Default Buyer Window Order" containing several checkboxes:
  - Hide Window Size
  - Hide Window Number
  - Hide Product Number
  - Hide Product Name
  - Hide Product Color
  - Hide Product Price
 Below these checkboxes is a text input field labeled "Order Title".

As each Design Center has different requirements for the information that they want on the Windows Order screen and the Buyers Order report there is a way to customize them from within IBSWIN to include and/or exclude specific information.

By going to the **Setup: Company Config.** menu, selecting **Edit**, and then the **Windows** tab you will have the options pictured to the left available to you.

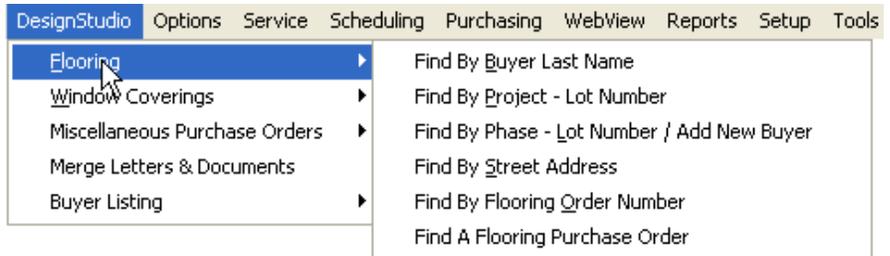
By checking the appropriate boxes, IBSWIN will automatically exclude the Price column from the **Buyers Order** screen and other information from the Buyer Order report/agreement. This includes modifying its **Title** and changing the **Disclaimer** to suite your requirements. There is also a **PO Legal Verbiage** button in the same screen that allows you to customize you legal verbiage.

## Processing Flooring Orders

Once you have completed the setup of your flooring database you will be ready to start working with your buyers and processing your flooring orders. Refer to Appendix #4 on page 42 for global parameters that will affect the functioning of your buyers flooring order. Please follow the steps outlined below:

### Six Steps to Creating a Flooring Order

Under **Design Studio: Flooring** is where you will create, modify, and generate your flooring orders. Each selection in this menu allows you to find a specific lot (and/or buyer) using whatever criteria you have available to you and will open the **Flooring Order Screen** as pictured below.



Buyer Flooring Order For Lot: 10 - JON & MARY JONES

Salutation: -- BUYER 1 --

First: [ ]  
Last: JONES  
Full: JON & MARY JONES

First: [ ]  
Last: [ ]  
Full: [ ]

Lot: 473 San Carlo  
Address: San Juan Capistrano, CA 95236  
E-Mail: [ ]  
Current: 4154 WESTON ST  
Address: IRVINE, CA 93144

Dir: 01 Pharaoh Homes - SoCal  
Prej: S02 San Juan Villas  
Phase: 01 ASanJuan-Phase01  
Tract: 36665  
Lot: 10  
Seq: 10  
Plan: 10 Elev: A SqFt: 2,890

Home Phone: (949)871-7611 Fax: ( ) -  
Work Phn1: (714)816-6151 x1 Cell1: ( ) -  
Work Phn2: (949)918-8811 x102 Cell2: ( ) -  
Color Scheme: 1  
Designer: [ ] Appointment: [ ] Status: [ ]  
Constr Stage: 00 Building Permit / Trend: [ ]

Est Close: 07/01/1998 C.O.E.: [ ] Warranty Exp: [ ]  
Flooring Start: [ ] Flooring Finished: [ ]

Room	Supplier	Product	Color	Grout	Vn	Material Cut	Qty	Price	Gross	Allow	Total
Entry	COLO01	MARBLE	Mist				43.75	17.00	743.75	245.00	498.75
Hallway	COLO01	MARBLE	Mist				60.00	17.00	1020.00	336.00	684.00
Bathroom 1	COLO01	STDVINYL			6		39.00	5.00	195.00	195.00	0.00
Dining Room	MARK01	STDWOOD					62.00	0.00	589.00	589.00	0.00
Living Room	CARN01	RENAISSANCE	Sage				15.00	32.00	480.00	135.00	345.00
Family Room	CARN01	RENAISSANCE	Sage				12.00	32.00	384.00	108.00	276.00
Kitchen	COLO01	STDITLE					56.00	0.00	392.00	392.00	0.00
Nook Area	COLO01	STDITLE					32.00	0.00	224.00	224.00	0.00

Order Number: 000776 Flooring Balance Due: 4,104.77 Total Order: 4,104.77 Auto Fit Columns

Verify Calcs Save Delete Room Optional Rooms Pad/Ydg Extras Paymts Copy Edit PO Cancelled Flooring Print Exit

In this screen you will notice that the list of rooms available for this plan (as per the Measurement and Takeoffs screen – see page 10) will be available with the standard flooring items already pre-selected (as long as the Standards and Totals has been setup correctly – see page 15).

If there is no buyer information entered you will need to enter the buyer's first and last name and any other pertinent information as necessary. Once completed, you will be ready to enter the buyer's flooring selections. *For a*

*description of the fields located on the top portion of this screen please refer to Appendix #1 – page 38.*

### For Non-Spec Builders Only...

If this is the first time entering the flooring order screen for a specific lot then the window pictured to the right will appear asking you to select and confirm the floor plan that is applicable for that lot. This screen will show you the current **Plan** (if one exists) and below it will be drop-down list of the floor plans that are available for that specific phase/project.

**Confirm Lot's Floor Plan**

This is the first time a flooring order has been created for this lot. Please select the floor plan from the list of available floor plans.

Lot's Plan Number: [ 1 ]

Available Floor Plans: [ 10 ]

OK Exit

**Note:** If the lots have been pre-plotted before selling, the correct plan will already be selected in the **Available Floor Plans** field. In that case do not change the plan.

## Step 1 – Check room configuration (Delete/Add Optional or Standard Rooms)

Before you begin modifying the standard order, the first thing you will need to do is delete any optional rooms that do not belong for that specific lot. To do this you will need to use the **Delete Room** button. This is always the first thing you will need to do before moving ahead with any order, but only the first time you enter the lot. The system will always remember the previous flooring configuration. Since each room will automatically have the standard flooring selections already ordered (assuming everything has been setup correctly), all you have to do now is modify/upgrade the flooring order as per the buyers selections. Optional rooms may be **added** using the **Optional Rooms** command button.

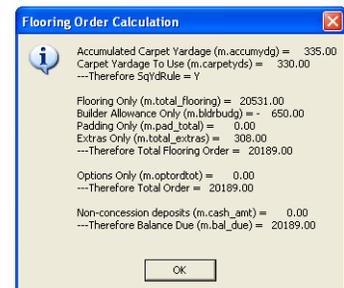
## Step 2 - Select the products/upgrades

For any rooms that require modifications from the standard flooring selection you will start at the **Supplier** column and choose the supplier of the material that is to be ordered. You may type the first few letters of the supplier's name or just select it from the drop down menu that will appear. If any extra's have been setup for the room (or the standard product) you will be prompted whether or not to keep or delete them. Next, select the desired **Product** from the available drop down which will list the selected supplier's products. When selecting a product with extras attached, IBSWIN will automatically add them to the order and can be reviewed using the **Extras** button.

**Note:** For each individual room area, you need only select your supplier names and products. Refer to the explanation of the copy function below to see how you can expedite the order process by copying the same product to different rooms.

As you select each product, IBSWIN will automatically calculate each of these columns: **Qty**, **Price**, **Gross**, **Allowance**, and **Totals** based upon your product set up and the room you are making your selections for. The **Total Order** button found on the bottom right gives you a breakdown of the total amount. The **Flooring Balance Due** which will deduct any payments entered using the **Payments** button.

<b>Flooring Balance Due</b>	<b>20,189.00</b>	<b>Total Order</b>	<b>20,189.00</b>
-----------------------------	------------------	--------------------	------------------



## Step 3 - Specify the color and/or material cut

If a color choice was setup for the product then you will be able to select a color from a drop-down located in the **Color** column, otherwise, you can manually type the color in the same field. This will print on the order and any relevant purchase orders. The **Vn** column is used to specify either 6' or 12' vinyl if applicable. If any special cuts (or designs) are requested for the flooring product you will then use the **Material Cut** field. Here you will be able to select, from a dropdown, any special cuts that were previously setup (i.e.: diagonal cut, berber carpet, etc) and it will automatically update your qty's, costs, and totals as necessary. For instructions on how to setup material cuts please refer to page 16. You can also type in this field if cuts have not been setup, but make sure to modify your qty's, costs and prices accordingly.

## Step 4 - Copying products to multiple rooms

After selecting your product for a specific room it, is possible to copy the chosen material to either all other rooms using that same material (e.g. all rooms with carpet) or to selected rooms of your choice. To do this you would select the room you wish to copy the product from and use the **Copy** button. **For example:** After you have chosen a specific grade of carpet in the living room you can use the **Copy** button to quickly select this same carpet grade for all other carpeted areas in the house, or if you choose, **by selecting no**, you will then be prompted to select the rooms to copy to from the list of available rooms.



Once you have completed all of the entries for this flooring order you can either **Save** your changes without exiting the screen, or select the **Exit** button to save and leave.

## Step 5 - Adding Extras

Using the **Extras** button in the *flooring order screen*, allows the designer to add additional flooring items to the selected room. These items may include individual room padding, borders, special tile cuts, additional costs for a specific color, or anything else that does not fall into the standard room flooring layout. Select the **New** to begin.

Cost Only	Room	Supplier	Installer	Product	Extra Description	Type	Qty	Units	Mtrl \$	Install \$	Retail \$	Gross \$	Allow \$	Net \$
	Front Entry	COLO01	COLO01	SLATE/SALILLO	Wonderboard		35.00		1.50	1.00	3.50	122.50	0.00	122.50
	Front Entry		MARK01		DIAGONAL Chg - S/T		44.00	SqFt	0.10	0.15	0.25	11.00	0.00	11.00
	Hallway1	COLO01	COLO01	SLATE/SALILLO	Wonderboard		35.00		1.50	1.00	3.50	122.50	0.00	122.50
	Hallway1		MARK01		DIAGONAL Chg - S/T		60.00	SqFt	0.10	0.15	0.25	15.00	0.00	15.00
	Kitchen	COLO01	COLO01	SLATE/SALILLO	Wonderboard		35.00		1.50	1.00	3.50	122.50	0.00	122.50
	Kitchen		MARK01		DIAGONAL Chg - S/T		70.00	SqFt	0.10	0.15	0.25	17.50	0.00	17.50
	Nook Area	COLO01	COLO01	SLATE/SALILLO	Wonderboard		35.00		1.50	1.00	3.50	122.50	0.00	122.50
	Nook Area		MARK01		DIAGONAL Chg - S/T		40.00	SqFt	0.10	0.15	0.25	10.00	0.00	10.00

The **Room** field will automatically show the room you are entering the extra for. Then you need to specify who the **Supplier** and **Installer** is (if applicable), the **Product** name, **Type** of material, the **Qty** (if left blank it will default to room measurement), **Unit** of measurement, and then all the cost and price related fields. As soon as you enter the supplier cost (**Mtrl \$**), the install cost (**Install \$**), and the unit price (**Retail \$**), IBSWIN will automatically calculate the **Gross \$** amount (**Retail x Qty**) and the **Net \$** (**Gross - Allow**) if applicable. The **Allow \$** column allows you to enter any allowances for the extra if applicable. The **Total Extras** field at the bottom will display the total **Net \$** for all the extras for the entire order.

**Important Note:** When **Cost Only** is checked for an extra, it will not print on the buyers order but will appear on the relevant PO. Also, make sure that **Units** column is completed properly (e.g. EA for each, LnFt for linear foot, etc.)

To delete an extra, highlight the line, and select **Delete**. The **Notes** button can be used to enter any additional description for the extra and will turn red when a note exists for the selected extra. **Copy** allows you to copy the selected extra to other rooms and **Exit** returns you to the main ordering screen.

## Step 6 - Selecting Padding/Yardage

The **Pad/Ydg** button brings in a list of carpet padding (that has been previously setup) from which to select from for your carpet selections. In addition, it allows you to verify and change the actual quantity of carpet and padding to be ordered by displaying both the **Standard** and **Cumulative** (room by room) carpet measurement. This will provide your designer with the information required, and the flexibility, to modify this screen as necessary.

Carpet Ordered	Color	Accum. Area	Calculated Carpet	Carpet Override	Calculated Pad	Pad Override	Choose Pad	Pad Weight	Pad Price
RENAISSANCE	Sage	80.30	80.30	0.00	80.30	0.00	3/5"	8LB	4.25
WINDJAMMER	Ishmal	35.10	35.10	0.00	27.00	0.00	1.5	2LB	1.75

Accumulated Carpet Yardage: 115.40  
 Standard Carpet Yardage: 120.00

Pad Total: 388.52  
 Padding Allowance: 500.00  
 Padding Order (Net): -111.47

To order padding you will need to select it from the **Choose Pad** column to the right. The **Pad Total** will automatically be calculated and displayed on the bottom right of the screen. It will be based on the amount of yardage in the **Calculated Pad** column unless something is entered in **Pad Override** column. For a detailed description of each of the fields in this screen and how it works please refer to Appendix #2 on page 40.

**Please Note:** The padding selection screen assumes that the padding will be the same throughout the plan/house by carpet selection. To add a different type of padding for an individual room area you will need to add it as an extra using the **Extras** button and reduce the quantity in the pad screen as necessary.

## Creating Multiple Orders (Ideas, Schemes or Scenarios)

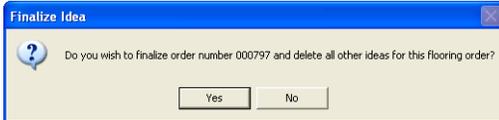
IBSWIN allows you to create multiple flooring ideas for each lot prior to finalizing the order. This allows you to work with a homeowner more effectively by having the ability to run through multiple flooring scenarios and selections. Each scheme or idea is automatically saved and can be modified and reviewed as necessary. For each scenario you can generate a flooring order contract/agreement which can be reviewed and signed by the homeowner to approve the order. Generating the PO's will finalize the order.

To create a new scenario, use the arrow button next to the **Order Number** field (as pictured above) and select either **New** or **Copy**. **New** will create an entirely new scenario starting with the standard flooring in each room (same as when you enter a lot to create the initial order). **Copy** will duplicate the current scheme to use as a starting point for a new one. Each scheme or idea is assigned a unique **order number** as a reference that will print on the flooring order contract.

To review an existing scheme/order all you have to do is select the associated **order number** from the pull-down next to the **Order Number** field. This allows you to easily switch between ideas. Finalizing your order will delete all existing ideas except for the order being approved (see Finalizing Orders in the next section for details).

## Finalizing Orders

Once a buyer has decided to accept an order (or idea) it can be finalized by either pressing the **Save** button (in the flooring order screen) or by attempting to print a **Purchase Order**. In both cases the message pictured to the left will appear. Before finalizing always make sure that the order you want to finalize is the one displayed in the ordering screen. If the correct order is displayed select **Yes**.



Finalizing an order will allow you to print **Subcontractor Purchase Orders** from the **Print** menu if you have the security rights to do so.

## Modifying or Canceling a Finalized Order

All finalized orders can be changed, however, once PO's have been generated, you will need to take extra steps to inform your subcontractor/s of the changes.

To change a finalized order all you need to do is modify the product selections as necessary. With each change you will be notified of the PO's that will be affected. If a selection is changed, IBSWIN will revise the applicable PO's and their associated lines. You will be able to generate new PO's for your changes.



**Please Note:** When you (re)print the PO's any extras and cancelled items will be listed separately below the existing items of the original PO. These cancellations will be deducted from the total, however, *sales tax and freight amounts will not change automatically. This must be done manually.*

The **Cancelled Flooring** button turns red and logs each change or cancellation. From this screen you can also print a **Buyer Cancellation report** or a **Subcontractor Cancellation Notice**.

## Flooring Order Screen Buttons Defined



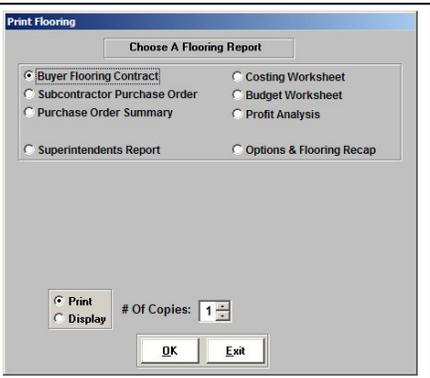
This function allows you to insert numerous .jpg images or scanned documents and PDF files to this buyer/lot. As an example, this function can be used to store an image of the floor plan or signed sales agreement. This makes it easy to find and access important documents from the buyers screen rather than wading through large filing cabinets.

To attach a scanned image or PDF document select the **Add an Item** button then browse to the file you would like to attach. Then enter a description in the **Description** field.

**Please note:** IBSWIN will only be able to attach pictures or files that are stored in a folder or path that does not contain any spaces or non alphanumeric characters. The file name itself must also not contain non alphanumeric characters or spaces.

To view a file that has been added simply double click on the picture (or icon) that appears in the **picture/PDF doc** column.

	<p>This button deletes the entire flooring order or idea that is currently on the screen.</p>
<p><b>Verify Calcs</b></p>	<p>This button verifies that all numbers and totals are accurate. This can help make sure that there are no mistakes with any user entry when modifying a flooring order.</p>
<p><b>Save</b></p>	<p>Saves the current order. If there is more than one idea (see page 25) you will be prompted to finalize the current order. If you are <i>not</i> ready to finalize your current order click <i>No</i>. This will retain your orders and will not finalize anything.</p>
<p><b>Delete Room</b></p>	<p>Allows you to delete a room from the current order. You will also be prompted to delete any extras if applicable.</p>
<p><b>Optional Rooms</b></p>	<p>Allows the designer to add additional rooms to the order that were designated as ‘<i>Optional</i>’ in Floor Plan Takeoffs.</p>
<p><b>Pad/Ydg</b></p>	<p>This button is used to select the individual types of carpet padding to be installed for this order. In addition, it allows you to specify the actual quantity of carpet to be ordered (see page 25 for more details).</p>
<p><b>Extras</b></p>	<p>Additional flooring items can be entered for a room here. This may include individual room padding, borders, special tile cuts, additional material costs for a specific color, or anything else that does not fall into the standard room flooring layout. For more information please refer to page 24.</p>
	<p>Used to add any additional detail notes needed for that particular room which will also print on the Buyers Flooring Contract and Purchase Orders.</p>
<p><b>Paymts</b></p>	<p>This screen allows you to enter payments or deposits for the flooring order. Select <b>New</b>, choose the <b>Payment Type</b>, and enter the remaining details. Payments will print on the Buyers Order.</p> <p><b>Note:</b> The <b>Payment Origin</b> column delineates whether the payment is for Options (<b>OPT</b>) or Flooring (<b>FLR</b>).</p> <div data-bbox="1013 1106 1487 1434" data-label="Image"> </div>
<p><b>Copy</b></p>	<p>This is a useful copy feature. See Step 4 on page 24 for more information.</p>
<p><b>Edit PO</b></p>	<p>Allows you to Edit existing Flooring purchase orders by adding additional items and allowing you to re-sequence the columns to your desired layout. For more information please refer to page 36.</p>
<p><b>Cancelled Flooring</b></p>	<p>This button logs any cancelled or changed items in a flooring order and its associated extras only if a purchase order has been generated. This button will be red if any cancellations are recorded.</p>

<p><b>Print</b></p>	<p>This is where you can print the key flooring order reports and purchase orders. The following reports are available:          1) Buyers Flooring Contract, 2) Subcontractor Purchase Order, 3) Purchasing Order Summary, 4) Superintendents Report, 5) Costing Worksheet, and 6) Profit Analysis.</p>	
<p><b>Exit</b></p>	<p>Allows you to exit the screen after being asked if you wish to save your changes or finalize an order. Please refer to the description for the <b>Save</b> button.</p>	

## Processing Windows Orders

Once you have completed the setup of your flooring database you will be ready to start working with your buyers and processing your flooring orders. Please follow the steps outlined on the following pages:

Window Coverings	Find By Buyer Last Name
Miscellaneous Purchase Orders	Find By Project - Lot Number
Purchase Order By Phase	Find By Phase - Lot Number / Add New Buyer
Merge Letters & Documents	Find By Street Address
Buyer Listing	Find By Window Covering Order Number

## Four Steps to Creating a Windows Order

Under the **Design Studio: Window Coverings** menu is where you will be creating, modifying, and generating your window covering orders. Each of the selections in this menu will allow you to find a specific lot and/or buyer depending on your search criteria and will open the **Window Covering Order** screen as pictured below.

In this screen you will notice that the list of rooms with windows for this plan will appear (as per what was setup in the Plan/Room/Window Selections screen – page 19).

Extra/Room	Wn#	Window	Supplier	Window Covering	Color	Price
Halfway1		8 x 10	BER001	MINI BLINDS		225.00
Halfway1		8 x 10	BER001	MINI BLINDS		225.00
Halfway1		8 x 10	BER001	MINI BLINDS		225.00
Entry		8 x 15	JBC01	POLY BLINDS		143.00
Bathroom 1		8 x 15	BER001	FAUX WOOD BLINDS		455.00
Dining Room		48 x 48	JBC01	SMOOTH WOOD BLINDS		421.75
Dining Room		60 x 60	BER001	POLY BLINDS		1170.00
Dining Room		60 x 60	BER001	POLY BLINDS		1170.00

Order Number: 000023      Window Covering Balance Due: 5,444.50      Total Order: 5,444.50

Buttons: Delete Line, Extras, Notes, Payments, Copy, Edit PO, Cancelled Orders, Print, Exit

If there is no buyer information you will need to enter the buyer's last name, full name, and any other contact information as required. Once completed, you will be ready to enter the buyer's window selections.

*For a description of the fields located on the top portion of this screen please refer to Appendix #1 – page 38.*

### For Non-Spec Builders Only...

If this is the first time entering the Window order screen for a specific lot then the window pictured to the right will appear asking you to select and confirm the floor plan that is applicable for that lot. This screen will show you the current **Plan** (if one exists) and below it will be drop-down list of the floor plans that are available for that specific phase/project.

**Note:** If the lots have been pre-plot before selling then the correct plan will already be selected in the **Available Floor Plans** field. In that case do not change the plan.

Confirm Lot's Floor Plan

This is the first time a flooring order has been created for this lot. Please select the floor plan from the list of available floor plans.

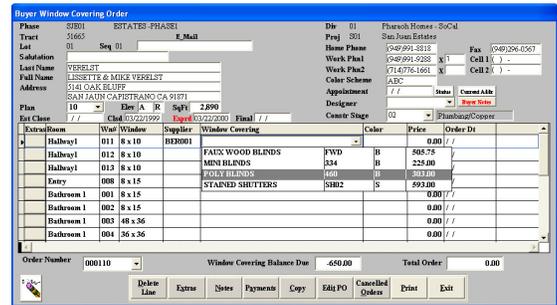
Lots Plan Number: 1

Available Floor Plans: 10

Buttons: OK, Exit

## Step 1 - Select the products/upgrades

To begin selecting the products for each window (listed by room) you will start at the **Supplier** column and choose the supplier for the windows covering that is to be ordered. It is possible to type the first few letters of the supplier's name or just select it from the drop down menu that will appear. Next, select the desired **Window Covering** from the list of products offered by the supplier for the specified window size. As you select each product IBSWIN will automatically calculate the **Order Total** and the balance due which will deduct any payments entered using the **Payments** button.



The **Notes** button allows you to add any additional description or notes to the selected window/product that has been ordered. This will print on the buyers order as well as the relevant PO's.

## Step 2 - Specify the color

If a color choice was setup for the window product then you will be able to select a color from a drop-down located in the **Color** column. You can also manually type the color in the same field if it does not appear in the dropdown. This will print on the order and any relevant purchase orders.

## Step 3 - Copying a product to multiple windows

After selecting the window covering for a specific room/window it is possible to copy the selection in two ways. The first way is to copy the selected window covering to all the windows of the same size (throughout the house/plan) or you can choose which windows of same size you wish to copy to.

To copy a product, select the room/window you wish to copy from and use the **Copy** button. You will then be prompted to copy to all windows of the same size. If you want to do this select Yes, otherwise select No. By selecting No you will then be asked whether or not you wish to copy the selected window covering to any window of your choice that is of the same size. Selecting Yes will give you a list of windows (by room) which can be selected to copy to. Selecting No will exit the copy screen.



## Step 4 - Adding Extras

Using the **Extras** button in the **Window order screen** (which is located on the left hand side of the each room/window) allows you to add additional window covering related items to the selected room/window. These items may include any additional products or items that may need to be ordered for the selected window.

To add an extra select **New** and the **Room** field will automatically show the room you are entering the extra for. Then you need to specify who the **Supplier** and **Installer** is (if applicable), the **Product** name (if applicable), the **Xtra Description**, the **Qty**, the supplier cost (**Mtrl \$**), install cost (**Install \$**), and the **Retail** price. IBSWIN will automatically calculate the **Total** amount (**Retail x Qty**). The **Total Window Covering Extras** field at the bottom will display the total retail amount for all the extras for the entire order.

**Important Note:** The Extras button at the bottom of the Window Covering order screen allows you to view all the extras for the order but will not allow you to add additional ones. This must be done as per the above instructions.

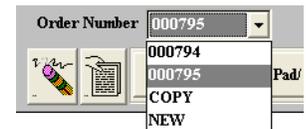
To delete an extra, highlight the line, and select **Delete**. The **Notes** button can be used to enter any additional description for the extra will turn red when a note exists for the selected extra.

Once you have completed all of the entries for the Window Order you can either **Save** your changes without exiting the screen, or select the **Exit** button to leave.

## Creating Multiple Orders (Ideas, Schemes, or Scenarios)

IBSWIN allows you to create multiple Window orders for each buyer prior to finalizing the order. This allows you to work with a homeowner more effectively by having the ability to create multiple window covering scenarios. Each scenario (or idea) can be saved, modified, and reviewed as necessary until an order is finalized and the associated PO's have been generated. You can even generate a Window order contract for each scenario which can be signed by the homeowner to approve a specific order.

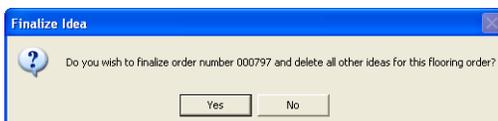
To create a new scheme use the arrow button next to the **Order Number** field (as pictured) and select either **New** or **Copy**. New will create an entirely new order/idea starting with the standard Window selections (same as when you initially entered the ordering screen), and the copy will duplicate the current scheme to use as a starting point for a new one. Each scheme or idea is assigned a unique **order number** as a reference that will print on the Windows Order contract.



To review an existing scheme/order all you have to do is select the associated **order number** from the pull-down next to the **Order Number** field. This allows you to easily switch between ideas. Finalizing your order will delete all existing ideas except for the approved and final order (see Finalizing Orders in the next section for details).

## Finalizing Orders

Once a buyer has decided to accepted an order (or idea) it can be finalized by either pressing the **Save** button (in the Window order screen) or by attempting to print a **Purchase Order**. In both cases the message pictured to the left will appear. Before finalizing always make sure that the order you want to finalize is the one displayed in the ordering screen. If the correct order is displayed select **Yes**.



Finalizing an order will allow you to print the *Subcontractor Purchase Orders* using the **Print** button if you have the security rights to do so.

## Modifying or Canceling a Finalized Order

All finalized orders can be changed, however since PO's have been generated you will need to take extra steps to inform your subcontractor/s of the changes.

To change a finalized order all you need to do is modify the product selections as necessary. With each change you will be notified of the PO's that will be affected. If a selection is changed IBSWIN will revise the applicable PO's and their associated lines. You will be able to generate your new PO's like normal.

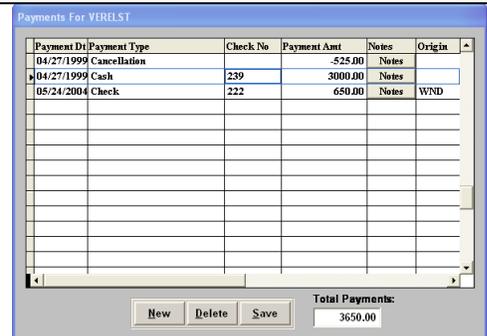


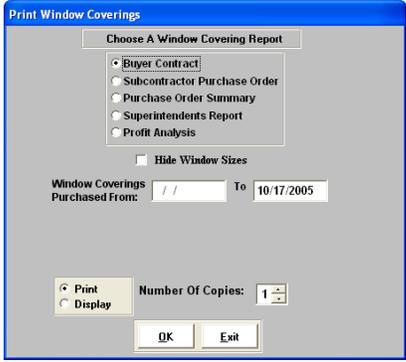
**Please Note:** When you (re)print the PO's any extras and cancelled items will be listed separately below the existing items of the original PO. These cancellations will be deducted from the total however the sales tax and freight amounts will not change automatically. This must be done manually.

The **Cancelled Window** button turns red and logs each change or cancellation. From this screen you can also print a *Buyer Cancellation report* or a *Subcontractor Cancellation Notice*.

## Window Order Screen Buttons Defined

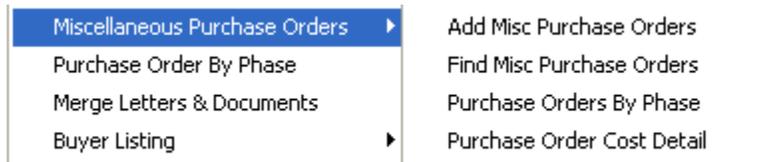
	This button deletes the entire Window order or idea that is currently on the screen.
<b>Delete Room</b>	Allows you to delete a room from the current order. You will also be prompted to delete any extras if applicable.
<b>Extras</b>	This is where you can view any miscellaneous items that have been included in the order (based on the products selected). This may include extended cords, treatments not part of the standard product, or any additional costs whether it be for labor or materials. For more information please refer to page 31.
<b>Notes</b>	Used to add any additional detail for the selected window which will print on both the Buyer Windows Contract and Purchase Orders. The <b>Notes</b> button will turn <i>red</i> if there are notes for a specific line item.
<b>Paymts</b>	<p>This screen allows you to enter payments or deposits for the Windows order. Select <b>New</b>, choose the <i>Payment Type</i>, and enter the remaining details. Payments will print on the Buyers Order.</p> <p><b>Note:</b> The <i>Origin</i> column delineates whether the payment is for Options (<i>OPT</i>), Flooring (<i>FLR</i>) or Windows (<i>WND</i>). IBSWIN automatically assigns this code.</p>
<b>Copy</b>	This is a useful copy feature. See Step 3 on page 31 for more information.



<b>Edit PO</b>	Allows you to Edit existing Window purchase orders by adding additional items and allowing you to re-sequence the columns to your desired layout. For more information please refer to page 36.
<b>Cancelled Orders</b>	This button logs any cancelled or changed items in a Window order and its associated extras however only if a purchase order has been generated. This button will be red if any cancellations are recorded.
<b>Print</b>	<p>This is where you can print the key flooring order reports and purchase orders. The following reports are available:          1) Buyers Contract, 2) Subcontractor Purchase Order, 3) Purchasing Order Summary, 4) Superintendents Report, 5) Costing Worksheet, and 6) Profit Analysis.</p> 
<b>Exit</b>	Allows you to exit the screen after being asked if you wish to save your changes or finalize an order. Please refer to the description for the <b>Save</b> button.

## Miscellaneous Functions

Pictured below is the menu for creating miscellaneous Purchase Orders from the Design Studio module. Each menu item will be defined in the following sections.



### Add a Misc Purchase Order

There are two main 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* or *allocated* lots in a particular phase).

To create a PO select **Design Studio: Miscellaneous Purchase Orders: Add Misc Purchase Orders** from the main menu, then selected the phase (and a lot if applicable). The following screen will appear.

To add an item to the PO it is best to start with selecting the appropriate **vendor** or subcontractor. This is done using the pull down located on the top left corner of the screen. Select **New** the button to begin adding items to this PO. You will notice that the *Qty*, *Cost*, and *Total Amount* columns will automatically be '0'. 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*

<b>Qty</b>	The number of items you wish to order.
<b>Unit</b>	The unit of measurement for the particular item.
<b>Item/Product</b>	A description of the item and/or product you are ordering.
<b>Cost</b>	The cost per unit or item.
<b>Total Amount</b>	This is filled in automatically and is calculated by multiplying the quantity of items purchased by the total cost per unit.
<b>Notes</b>	To add additional notes or information regarding that particular item. The field will be highlighted in red if any notes are entered.
<b>Cost Code</b>	This is used to accurately assign the trade/cost (if applicable) for categorizing your costs and exporting purposes.

To print or display your PO select the **Print** button.

### Creating a Back Charge

A back charge is a credit purchase order used to charge an expense that was incurred back to a subcontractor, for example, if they did damage to a cabinet in the process installing a tile. To create back charge, select the **Bk Chrg** button and a window similar to the PO screen will open. Follow the same procedures to add items and/or products to a back charge as is outlined for a PO.

### Miscellaneous PO Menu Items

There are several menu items found under the **Design Studio: Miscellaneous Purchase Orders** menu (see the screen image on page 35) which are briefly described below.

1. **Find Misc Purchase Orders:** Allows you to find, print, or edit an existing Purchase Order. When it asks you to enter the PO number, if you leave it blank it will display a list of all PO's to choose from. For how to edit a PO refer to the next section of this user guide.
2. **Purchase Orders by Phase:** This selection prints (or displays) a report showing purchase orders by lot for one or more phase. Other options allow you to modify how the report subtotals the Po amounts.
3. **Purchase Order Cost Detail:** Allows you to print purchase orders for one or more phase sorted by cost code.

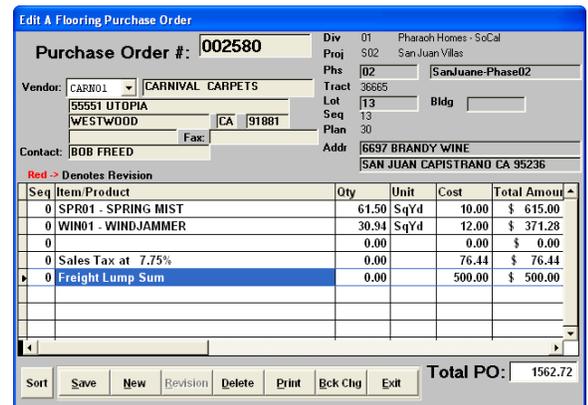
### Editing a Purchase Order

Flooring PO's, generated from the buyers flooring order, can be viewed edited and printed from the **Edit PO command button found in the flooring order.**

The **Seq** (Sequence) column (to the very left) provides you with the ability to sort PO line items. Just enter in numbers (1, 2, 3, 4... ) to denote the order you would like the items appear. A **Sort** button on the bottom left will the resort the items on screen.

You also have the ability to add a blank line by creating and new line with zero values.

Additionally, miscellaneous PO's can be found under **Design Studio: Miscellaneous Purchase Orders: Find A Misc. Purchase Order.** This screen allows you view, print, and edit your miscellaneous PO's.

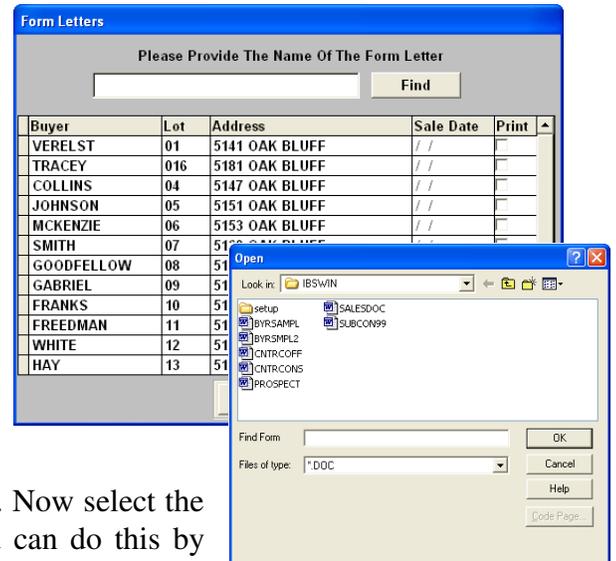


## Merge Letters and Documents



Company created form letters can be set up in advance and be available for printing at any time. Each letter can be edited by the sender at the time the letters are to be printed. When this option is selected you will be prompted to narrow down the selection of buyers as per the conditions pictured left. Doing so will display a list of buyers from which you can choose to send a letter to.

In this screen (right), listing the buyers, start by selecting the **Find** button. This will display a list of the available form letters in the displayed directory. If you have not created a preformatted template you will need to do so in *Microsoft Word* (See Appendix #3 on page 41 for information on setting up or create a merge letter). If you have already some previously created letters, but they do not appear, you will need to browse and find them in the directory where you have stored them.



Select the letter to be printed by highlighting it and click **OK**. Now select the buyers to whom you would like to send your letter to. You can do this by check-marking the boxes in the **Print** column. Now select **Print** to start the printing process. If you want to select all the listed buyers there is a **Select All** button on the bottom right of the screen.

*Microsoft Word* will now open and a personalized letter will be generated for each buyer that was selected. If required, before printing you can edit the letters individually. When you are ready print your letters as you normally would.

**Note:** The template for letter remains unchanged even though changes are made to the individual letters.

Once printed, return to the IBSWIN where you will be prompted to print mailing labels. IBSWIN will format your labels to be used with Avery 5160 label sheets (3 x 10).

## APPENDIX #1

### Flooring & Windows Order Screen Defined

The top portion of the screen shows the **Buyer Information**. Anyone with the appropriate security rights may edit any information that is not correct – see your system administrator for assistance.

Below is a description of the key features and areas of interest for this screen.

Buyer Flooring Order For Lot: 10 - JON & MARY JONES

- BUYER 1 -		Div 01 Pharaoh Homes - SoCal	
Salutation		Proj S02 San Juan Villas	
First		Phase 01 ASanJuan-Phase01	
Last	JONES	Tract 36665	
Full	JON & MARY JONES	Lot 10	Seq 10
- BUYER 2 -		Plan 10	Elev A
First		SqFt 2,890	
Last		Home Phone (949)871-7611	Fax ( ) -
Full		Work Phn1 (714)516-6151 x1	Cell 1 ( ) -
Lot 473 San Carlo		Work Phn2 (949)918-8811 x102	Cell 2 ( ) -
Address San Juan Capistrano, CA, 92236		Color Scheme 1	
E-Mail		Designer	Appointment // Status
Current Address 4154 WESTON ST		Constr Stage 00	Building Permit / Trans
Address IRVINE, CA 92644		Est Close 07/01/1998	C.O.E. // Warranty Exp //
		Flooring Start //	Flooring Finaled 03/17/2008

#### Buyer Information Defined (Top)

**Phase, Lot, Tract, Seq, Div, and Proj** describe which home the current buyer record belongs to. **Salutation** is an extra field used for naming purposes.

**First Name** is the first name of the main buyer.

**Last Name** is the last name of the main buyer and is used in the search/find function by last name.

**Full Name** is what will print on all reports and letters where the buyer's name appears. It is created from the input of First and Last name.

**First Name(Buyer2)** is the first name of a second buyer.

**Last Name(Buyer2)** is the last name of the second buyer and is used in the search/find function by last name.

**Full Name(Buyer2)** Created from the input of First and Last name.

**Address** is filled in from the sequence sheet and is the address of the *new* home that has been sold. The city, state, and zip code is referenced from the phase records and can be changed if needed.

**Plan, Elev, & SqFt** provides the details of the home that is being purchased on this lot.

**Est. Close, Clsd, Expired** are close of escrow related fields. Expired gets calculated automatically

**Color Scheme** refers to the color scheme code and refers to the information entered in the sequence sheet. Double-click to enter the specifics of the color scheme.

**Appointment** is where you would enter the date for your next scheduled appointment with the buyer. This appears in the Flooring Status Report.

**Status** button allows you to enter a note regarding the flooring order status, i.e. Buyer coming in for second appointment. This appears in the Flooring Status Report.

**Current Addr** allows the buyer's current address to be entered. This address will be used on correspondences / reports that will be sent to the buyer.

*Designer* name can be selected from a drop down list that is set-up under **Setup: Designers**

*Buyer Notes* button  can be used to record any specific notes. Each note is automatically date stamped. The button will turn red if a note has been entered and will also appear on the Option Status Report.

*Constr Stage* is automatically populated if using the construction scheduling module. The Construction Stage can also be manually selected and changed using the drop-down list. This affects the ordering of any products that have been set up with ordering constraints based on the construction stage of a house. In this case a warning will appear letting you know that the construction of the house is past the allowable ordering time frame for this product. This can be overridden with caution.

*Flooring Start & Flooring Finaled* dates of you order start and when it is finaled.

### ***Remainder of the Screen***

The second half of the screen is devoted to entering and listing the details of a flooring or windows order for each of the rooms in the selected plan. For detailed information about adding or entering a flooring order please go to page 22. For windows orders go to page 34.

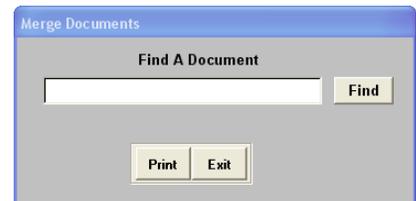


## APPENDIX #3

### Creating Merge Letters and Documents

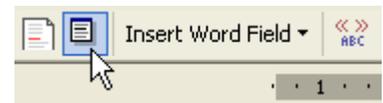
IBSWIN can use your existing letters or documents (created in Microsoft Word) to generate a customized letter for your Buyers with the click of a button. By simply inserting IBSWIN merge fields from within Word you can create a generic merge template for each type of letter you use and each time you print it from within our system any personalized information (e.g. recipient name, contact details, and any project/phase information, etc) will be inserted automatically from IBSWIN.

To create a merge (letter) template you will need to have either an existing letter or document created in Word. To insert the merge fields to be populated by IBSWIN start by selecting **Setup: Merge Documents & Templates: Buyer Merge Documents** or **Prospect Merge Documents**. Using the **Find** button, browse and select the letter you wish to modify (or want to insert merge fields into) and select **Print**. Word will open twice.



The first instance of Word will open your letter as a template and the second will attempt to generate a customized letter (called Form Letter 1). As we are not generating any letters nothing noticeable will happen and you can just ignore (or close) the form letter. However, when viewing your template you will see a new menu/toolbar that is available for you to use in Word. This mail merge tool bar will assist you in inserting your merge fields.

To do this you will use the **Insert Merge Fields** button which, depending on your version of word the button will appear as either a picture (see right) or as a button visibly named **Insert Merge Fields**. Generally it will be located to the immediate left of the **Insert Word Field** button which is used to insert Microsoft Word specific fields. If you wanted to insert the today's date into your document you would do this by going to the Insert menus and selecting **Date and Time**.



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

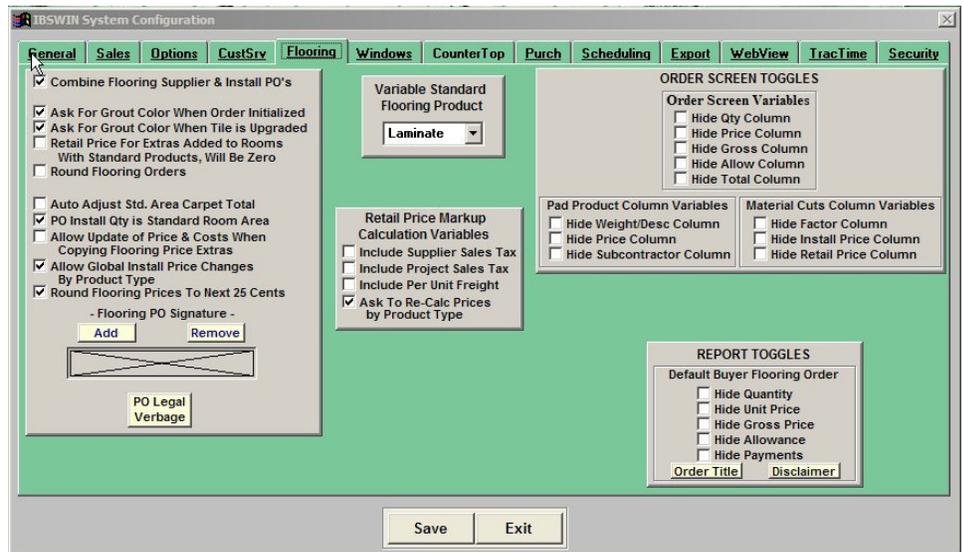
## APPENDIX #4

### Global Parameters - Company Config/Flooring

The IBSWIN flooring program responds to a number of global parameters initiated in **Setup/Company Config/Flooring**. Here, you can set your variable standard flooring product (the default is 'Laminate'). You can hide various columns of information from your order screen and from your buyers flooring order if you are using the IBSWIN default buyers report. Clients with custom reports may have these default flags incorporated as well.

You may modify your Retail Price calculations by checking the Retail Price Markup Calculation Variables. You can include a suppliers specific sales tax rate or

a specific project sales tax rate. You can also include a Per Unit Freight amount in the markup calculation. The flag to 'Ask To Re-Calc Prices by Product Type', if set, will allow you to change an install price per unit in the Flooring Prices screen. When the install price is changed here, you are asked if you would like to recalculate all retail prices for that current product type. If you answer 'Yes', all the install prices are changed for that product and the retail price is recalculated. This change will be applied to all products of the same product type for the current supplier.



Other global flooring flags are as follows:

1. **Combine Flooring Supplier & Install PO's** – puts for ordered product info and install info on the same PO (same supplier supplying product and doing the install)
2. **Ask For Grout Color When Order Initialized** – if your standard products include a tile, you are asked to input a grout color as the flooring order is initialized. All products of this type will automatically receive your grout input.
3. **Ask For Grout Color When Tile is Upgraded** – when a room is changed or upgraded to a tile product, you will be prompted to enter the appropriate grout information.
4. **Retail Price For Extras Added To Rooms With Standard Products, Will Be Zero** – if you change the flooring product on a room to a standard product (STD), any associated extra added will result in a retail price of zero for that extra.
5. **Round Flooring Orders** – Order prices will be rounded to the nearest \$1.00

6. **Auto Adjust Std Area Carpet Totals (OPTIONAL ROOMS MUST BE DESIGNATED IN FLOORPLAN TAKEOFFS FOR THIS TO WORK)** – The Standard Carpet yardage is automatically modified as follows:
  - a. **Change room product a carpet product to another product type** – Std Deduct is deducted from the Standard Carpet amount if present, otherwise, the actual carpet amount is deducted.
  - b. **Change room product to a carpet product** – if you have set up a Std Deduct amount for this room, this amount will be added to the Standard Carpet amount, otherwise, the amount set as the carpet amount for this room will be added to the Standard Carpet amount.
  - c. **Delete a room** – If the rooms standard material was designated as carpet, the Std Deduct amount, if present, will be deleted from the Standard Carpet amount, otherwise, the carpet area is deducted from the Standard Carpet amount.
  - d. **Add an Additional Room** – if the default product for the room being added is carpet, the Std Deduct amount is added to the Standard Carpet amount, if present, otherwise, the carpet amount for that room is added to the Standard Carpet amount.
7. **PO Install Qty is Standard Room Area-** generated installation PO's will use the default area measurement for the current product type, as the install quantity. If a material cut has been applied to the product, the increased amount of material ordered may not affect the actual install amount.
8. **Allow Update of Price & Costs When Copying Flooring Price Extras** – When copying extras in the Supplier Prices screen, if the currently selected extra is already attached to other products, the price will be updated with the currently selected extras' prices, if this flag is set.
9. **Allow Global Install Price Changes by Product Type** – When this flag is set, an install price column is revealed in the flooring product type screen. When an install price is entered here, you can recalculate all retail prices for all or selected phases for this product type.
10. **Round Flooring Prices To Next 25 Cents-** rounds retail prices in Supplier Prices up to the next 25 cents.

Type	Product Description	Unit	Material Trade	Labor Trade	Install Price
N	No Material				0.00
C	Carpet	SqM	CARP	CARP	0.00
G	Granite	SqFt	CERA	GRAN	5.63
I	Vinyl Tile	SqFt			0.00
L	Limestone	SqFt			0.00
M	Marble	SqFt			0.00
P	Porcelain	SqFt			0.00
PD	Pad	SqFt			0.00
S	Stone	SqFt			0.00
T	Tile	SqFt			0.00
TM	Mahalium	Each			0.00
V	Vinyl	SqFt			0.00
W	Wood	SqFt			0.00
X	L-Product	SqFt			0.00

You can capture and print a signature graphic in you flooring PO's (applies to the default flooring PO). Likewise, you can add your own legal verbiage to your purchase order (again, only on the default PO).