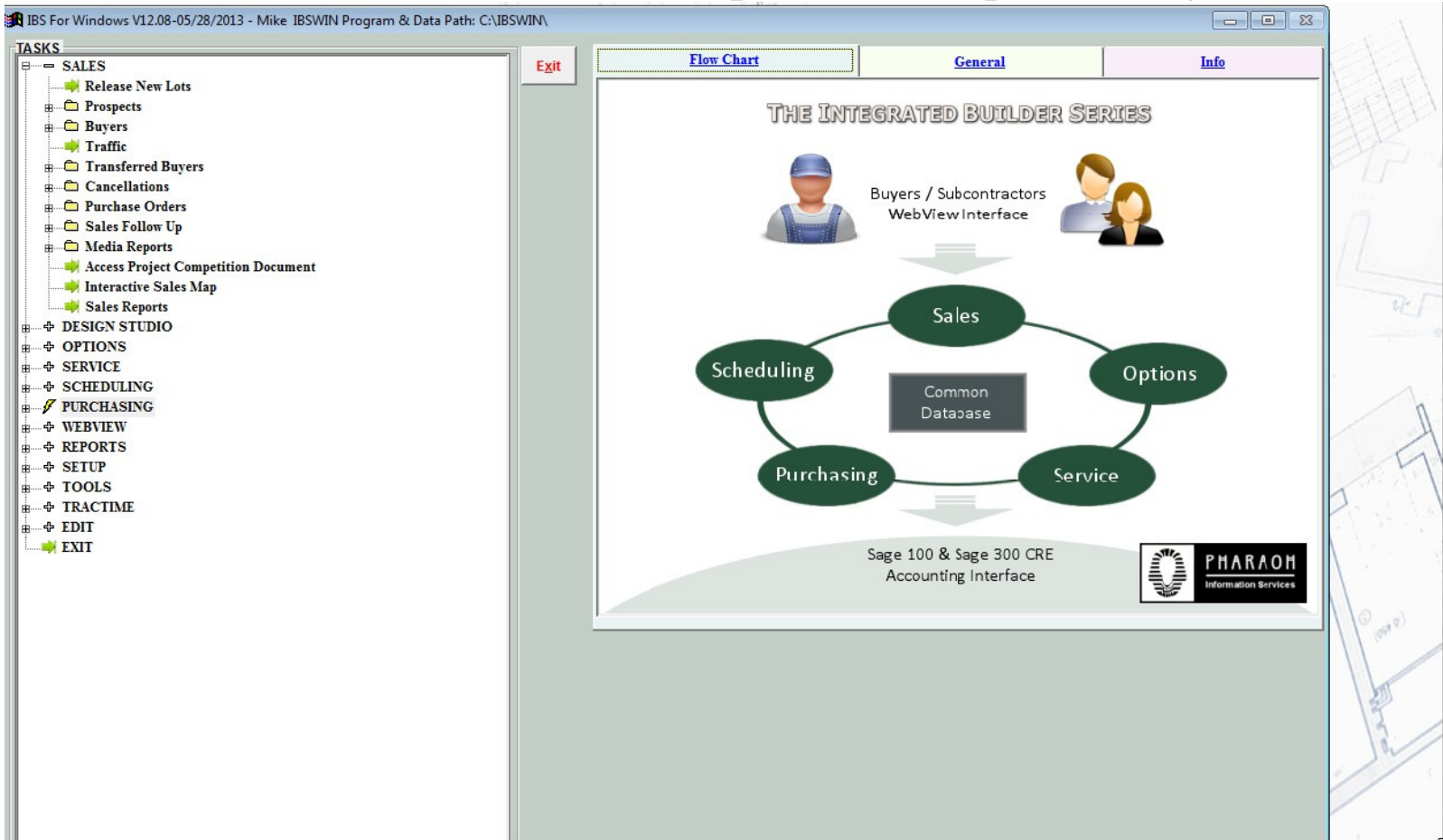


Integrated Builder Series

for Windows

(Version 12.XX)

Expanded Set-up & Configuration



Pharaoh Information Services, Inc.

Phone: (866) 813-5142

Fax: (949) 748-5142

www.IBSWIN.com

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IBSWIN – Expanded Setup & Configuration User Guide

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

Departmental E-mail Contacts:

Sales: sales@ibswin.com

Customer Support: support@ibswin.com

General Information and Assistance: info@ibswin.com

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Introduction

Congratulations on your decision to invest in the *Integrated Business Series for Windows (IBSWIN)* suite of products. IBSWIN represents the evolution of over 10 years of developing, improving, and simplifying the software for homebuilders like your company. Using the latest software tools it provides the user with a very simple interface and yet provides extremely powerful construction management and reporting capabilities. By using our software solutions, your company will benefit significantly by having better control of the information flowing through your various operational departments and providing management with reports they require with a simple push of a button rather than a full day ordeal.

We hope you enjoy your experience using these software products. To insure a successful experience, we offer an extensive **Customer Support Plan** that will assist you in your transition, by providing ongoing updates, along with ongoing support and training for your staff. Please feel free to contact us for more information.

Getting Started

This *User Guide* is brief, due to the simple design of the product, and we are confident that you will be able to quickly grasp the concepts of the system. Since it uses the standard windows mouse and keyboarding conventions, the learning curve should be rather easy. Once you have grasped the basic flow of the system you will appreciate the power and sophistication of the *IBSWIN* suite of products.

IBSWIN currently consists of the following modules: **Options Plus**, **Customer Service Plus**, **Scheduler Plus**, **Sales Manager Plus**, **Designer Plus**, **Purchasing Power**, and various add-ons comprising of **TracTime** (*Pocket PC – schedule updating and more*), **Batch Faxing** (*Zetafax*), **Floorplan Magic**, **Option Magic** and **Plot Map** (*from InView Studios*) and **Webview** (*Internet interface to various modules*). Since IBSWIN is an integrated system, there are common set-up functions for all these modules. This *User Guide* will take you through the “common” database set-up functions. Each module has its own expanded User Guide which also includes the set-up functions specific to that application (if any), along with instructions on how to use it in your day to day environment. Since any data entered in our system is shared between all the modules (and your operational departments) there is a significant reduction in redundant data entry. This significantly reduces time, increases efficiency, and everyone in your organization can share consistent reporting.

Installation Instructions

The installing of **IBSWIN** is designed to be simple and easy and is compatible with any PC running Windows 98 and above. Using the CD you received from Pharaoh please follow the instructions below.

Installation:

Insert the **IBSWIN** CD into your CD-ROM drive. Windows should automatically detect the CD and execute the installation program. If it does not you will need to click on the **Start** button (on the bottom left of your screen) and select **Run**. A small window will open. Using the **Browse** button select your CD-ROM drive. Double click on the **Setup.exe** file to run the installation program and follow the on screen prompts.

The default installation directory for IBSWIN is **C:\IBSWIN**. To install IBSWIN in a different location or on a networked computer select the **Change Directory** button when asked to confirm the installation location. Then select the desired drive and/or installation folder (for example F:\APPS\IBSWIN).

Note: If you intend on having multiple workstations running IBSWIN then you must copy the **Workstation_Install** folder from the installation CD into the IBSWIN folder.

Setting up multiple workstations:

IBSWIN is a true multi-user relational database system. When installed on a network, many users can access and update the same information at the same time. IBSWIN only needs to be installed once on a server or workstation. From there the main database will be shared to other networked users. To setup additional users/workstations you need to run the setup program found in the **WORKSTATION_INSTALL (CLIENT for our older clients)** folder from the new workstation. When the screen that says “Install IBSWIN WORKSTATION INSTALL to” appears select the change button and navigate to the IBSWIN folder. Then finish the install. Once it has completed it will have created a shortcut (or icon) pointing to **Ibswin.exe** on your desktop. IBSWIN is now ready to use.

Starting IBSWIN

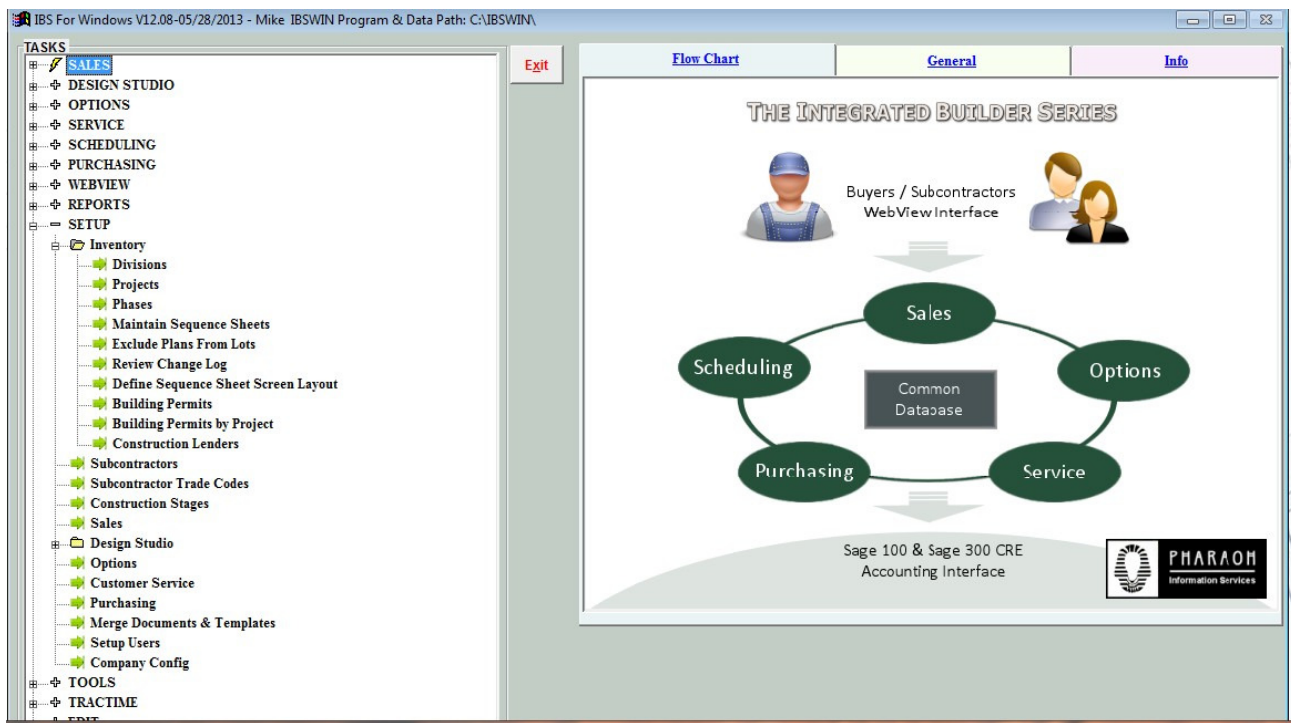
Once installation is complete, you are ready to run **IBSWIN** by selecting the icon on your desktop. If you do not have an icon on your desktop then you can run IBSWIN from the **Start** menu in the **Programs: IBSWIN** folder on the bottom left of your screen.

Setting up the Common Database Files

Upon running IBSWIN you will be greeted by a Login screen asking for your **Login ID** and **Password**. Enter these and select **OK**.



Note: Your new installation of IBSWIN comes with the default user ID and password of **ADMIN** to help you get started. The Admin user ID gives you full access to IBSWIN. You can choose to have any level of security you want for each user. For security purposes it is recommended that you change the password for user accounts and/or changing the security settings of existing accounts please go to page 29.



Once you are in **IBSWIN** you can access the modules you have purchased via the menu at the top of the screen. The current menu items are: **Sales, DesignStudio, Options, Service, Scheduling, Purchasing, Webview, Reports, Setup, Tools, TracTime, Edit, and Exit**. The first six items represent each of the modules that make up the base **IBSWIN** suite of products. When selected, each menu item will display a menu with a list of options that are available for that respective module (or selection). Any Modules that you have not purchased (or do not have access to), will be *grayed-out* and inaccessible.

To begin setting up your database, go to **Setup: Inventory** from the main menu. Here you will find the following selections: **Divisions, Projects, Phases, & Maintain Sequence Sheets**. These items make up the foundation of your IBSWIN database. The following sections of this User Guide will outline the setup of these *common database files*.

Setting up Divisions

[illegible]

The **IBSWIN** system has the capability to track buyers, service requests, service request items, and option orders for multiple divisions (or legal entities). How you create or define your divisions generally depends on the accounting practices of your company. To setup a new division select **Setup: Inventory: Divisions** and click the **New** button. You will then be prompted to type in a **Division Code**. The Division Code is a two-character code that identifies each unique division in your company. It is recommended that number assigned here correspond to the equivalent accounting code (if you have one). Fill in the remaining contact information as completely as possible. The address

information provided here will be used on various forms and reports.

The ***Export Enterprise***, ***Export Entity***, and ***Payment Enterprise*** columns are *only* used if you are exporting Purchase Orders and Contracts to the supported accounting systems. Please refer to our exporting guides for assistance.

The ***Builder Participation Flooring (%)*** are used to calculate Flooring product retail prices in our Flooring module.

When you have entered the relevant information for each of your divisions, you can either **Save** your changes or **Exit** without saving. The **Delete** button allows you to delete the selected division, however please note that all data for that division will also be deleted.

Setting up Projects

Multiple projects can be setup for each division. To setup projects select **Setup: Inventory: Projects** and choose the division that you wish to maintain projects for. Click the **New** button to add a project and assign it a ***Project Code*** followed by its ***Name***. As with a division the project code should be equivalent to the code used by accounting for each project. Continue filling in the remaining columns as completely as possible.

The **Active** column denotes whether a project is still active (A or blank) or no longer active (I). This will hide all information for this project from all the screens and menus except for customer service. The **Phone Numbers**, **Partnership Name**, and **Designated Lender** columns will be used on various reports and documents throughout the system. The **Option GL** and **Export Project** columns are

[illegible]

used for exporting to accounting, and the tax percentages are used in the *Options* and *Sales Manager Plus* modules.

Project Buttons Defined

Web Link	This feature allows you activate a project for use with our web based interface Webview. For details please refer to the Webview user guide.
Export SetUp	This button consolidates any export related columns in the project screen into one window to make it easier for you to enter the relevant codes.
Non-Spec Project	This button allows you to flag a project as a non-spec project. This can also be done globally and is recommended if all your projects are non-spec. Most Californian builders do not fall into this category. For more information please contact Pharaoh Information Services.
Project Notes	This is an area that allows you to keep notes specific to each project.
Overhead Costs	This button is used to enter project related costs for the Lot Cost and Profit Summary report in the Options Plus module
Sales Costs	This button is used to enter any loan fees and costs for qualifying prospects and buyers in the Sales Manager module. Please refer to the <i>Sales Manager Plus</i> user guide for more information.
Contract Prefix	Setup a contract number ' prefix '. This prefix is used to generate contract numbers in Purchasing. Auto contract numbers will automatically include this prefix.

Setting up Phases

Multiple phases (jobs) can be setup for each project/division. To setup phases select **Setup: Inventory: Phases** and choose the division and project that you wish to add or maintain phases for. Click **New** to add a new phase and assign a unique phase code and name to each phase. This **Phase No.** is the equivalent to your job number.

Important Note: The phase number must be unique across all your projects. For example do not use just 02 use 02MULH or as above SJE01 to uniquely identify each phase. If you are doing any offsite or indirect contractors or PO's you may also need to create a unique phases for that.

In this screen the **City**, **State** and **Zip** fields are especially important. These fields are used as part the lot address throughout the system and will eliminate a lot of unnecessary data entry. The street address for each lot will come from the sequence sheet as explained in the next section below.

Additionally, if you are using the IBSWIN Flooring module, the column labeled '**Flr Mstr**' is used to designate specific phase(s) as a flooring master phase. This has important significance in the Flooring module.

Likewise, the '*Bid Mstr*' flag, when checked, has important significance in Purchasing. Phases selected as Bid Masters, do not show up the Phase drop down menus except in Purchasing.

Phases Buttons Defined

Web Link	This feature allows you activate a phase for use with our web based interface Webview. For details please refer to the <i>Webview</i> user guide.
Counter Tops	Counter Tops Master Phase is used to denote the master pricing phase used in the Counter Tops module.
Flooring SetUp	Flooring Master Phase is used to denote the master pricing phase used in the Designer Plus (Flooring) module.
Export SetUp	The <i>Cost Cd</i> , <i>Option GL</i> , <i>Export Phs</i> , and <i>BudgeTrac Project</i> fields are used only if you are exporting information to an accounting system.
Trac Time	This feature allows you to define your Schedule Template & Field Manager.

Setting up Sequence Sheets

To setup or review an existing sequence sheet select **Setup: Inventory: Sequence Sheets: Maintain Sequence Sheets**. After selecting a phase use the *New* button to add a new lot to the sequence sheet. If you are setting up a new sequence sheet you will be prompted to set-up your plans first.

Setting up Plans

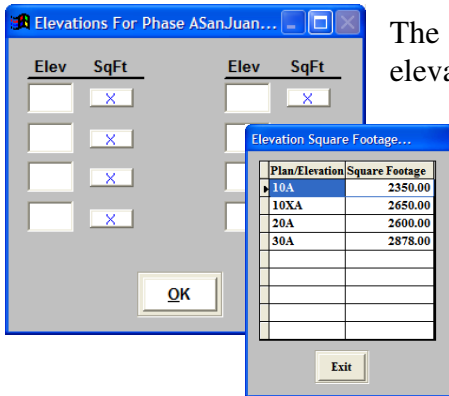
Use the **Plans** button to setup the basic plan and square footage information. This is mandatory for all modules. Only up to six alpha numeric characters can be used for the plan code. In the *plan* screen you will find the following buttons: **Copy Plans** which allows you to copy plans from one phase to another;

The 'SqFt For Each Plan' window displays a table with columns for Plans and Sq. Feet across three pages (Page1, Page2, Page3). The table contains data for plans 10, 20, 30, 40, and 150. A 'Plan Information' dialog box is overlaid on the table, showing details for Plan 10, including Plan Name (Mosaic Classic), Base SqFt (2890), Maximum SqFt, No. of Floors (2), No. of Bedrooms (3), No. of Baths (2.5), Dining Room Area, Special Features (Vaulted Ceilings), Fireplaces (2), Garage (4 Car Garage), and Base Price (345,000).

Rename a Plan that will allow to change the plan code and will automatically update that throughout IBSWIN; **Delete a Plan** that will delete the selected plan along with available option costs and prices for this plan—please use with caution; **Print** will print a Plan Information report showing the expanded plan marketing information that can be entered via **Expanded Plan Marketing Info** button which is the gray box with a blue X located to the left of the plan number.

Note: Entering the base price in the Expanded Plan Info screen will automatically enter it into the sequence sheet when selecting the plan for each new lot.

Setting up Elevations



The **Elev** button found in the plans screen allows you to predefine all the elevations available for ALL plans in the phase. By selecting the **Expanded Elevation** button (which is the gray box with a blue X located to the right of the elevation code) you can modify the square footage for any plan elevation if applicable.

Please Note: It is not mandatory to use the Elevation button. The Alternative would be to enter the elevations manually into the sequence sheet.

Setting up Lots

After your plans are setup select the **New** button to add any new or additional lots to your sequence sheet. When a new lot is added IBSWIN will automatically assign it the next incremental sequence (*Seq*) and lot number. Either of these can be changed if necessary. The *Seq* number is an optional feature used mainly for spec builders to re-sequence the lots in order of construction.

Sequence Sheet For Phase: 01 - ASanJuan-Phase01 Tract: 36665

Seq	Unit	Bldg	Plan	Elevation	Garage	Street	Graphics	Notes	Color	Tract	Start Date
02	2		30	A		459 San Carlo	Add Graphics	Add Note	3	36665	04/02/2001
03	3		20	A		462 San Carlo	Add Graphics	Add Note	1	36665	04/02/2001
04	4		10	A		443 San Carlo	Add Graphics	Add Note	3x	36665	04/02/2001
05	5		20	A		441 San Carlo	Add Graphics	Add Note	2	36665	04/03/2001
06	6		30	A		439 San Carlo	Add Graphics	Add Note	2	36665	04/03/2001
07	7		40	A		463 San Carlo	Add Graphics	Add Note	1	36665	04/03/2001
08	8		40	A		467 San Carlo	Add Graphics	Add Note	1	36665	04/04/2001
09	9		30	A		469 San Carlo	Add Graphics	Add Note	2	36665	04/04/2001
10	10		10	A		473 San Carlo	Add Graphics	Add Note	1	36665	04/04/2001
11	11		20	A		475 San Carlo	Add Graphics	Add Note	1	36665	04/05/2001
12	12		10	A		477 San Carlo	Add Graphics	Add Note	1	36665	04/05/2001
13	13		40	A		479 San Carlo	Add Graphics	Add Note	1	36665	04/05/2001
14	14		20	B	R	481 San Carlo	Add Graphics	Add Note	3	36665	04/06/2001
15	15		10	A	R	483 San Carlo	Add Graphics	Add Note	2	36665	04/06/2001
16	16		20	B		487 San Carlo	Add Graphics	Add Note	3	36665	04/06/2001
17	17c		20	B		487 San Carlo	Add Graphics	Add Note	3	36665	04/09/2001

Buttons: Web Link, Exclude Plans, Costs, Sales Price, Save, New, Delete, Replace Lot#, Subs, Dges, Plans, Reys, Print, Exit

Note: Please make sure that you use leading zeros for the *Sequence* and *Lot* numbers to insure proper sorting in the relevant screens and reports.

Next, select the applicable **Plan** and **Elevation** from the drop downs (or enter it manually if you are not using the **Elevations** button during Plans setup), and whether the plan is **Reverse (Garage)**. The **Street** field is used to specify street address for a lot and the **Add Graphic** button allows you to store any scanned documents or image files (in .jpg or PDF format) for each individual lot. The **Notes** button allows you to enter lot specific notes which will print on the sequence sheet beneath each lot.

You can also specify the color scheme for each lot in the **Color** field. By double clicking on that field, a window will open, allowing you to enter any additional information including the actual paint codes, etc. This will appear on selected reports and can be accessed in the lot/buyers screen throughout IBSWIN.

If you scroll further to right you will see the following fields/columns that are used specifically in the **Sales** module: **Plan Price**, **Lot Premium**, **Elev Premium**, **Preplot Options**, **Preplot Flooring**, **Preplot Windows** and **Base Price**. Here you can enter your **Plan Price** (if it has not been entered prior via the

Plans button) *Lot Premium* and *Elevation Premium*. The *Pre-plot Options* will update automatically if you have the options module otherwise you can enter them here by hand. The combination of these will be added together to calculate your *Base* or final *Sales Price*. This will carry over to the *Sales Plus* module. For non-spec builders please refer to the *Non-Spec Users Guide* for information on how to set up the base price for a lot.

Sequence Sheet Buttons Defined

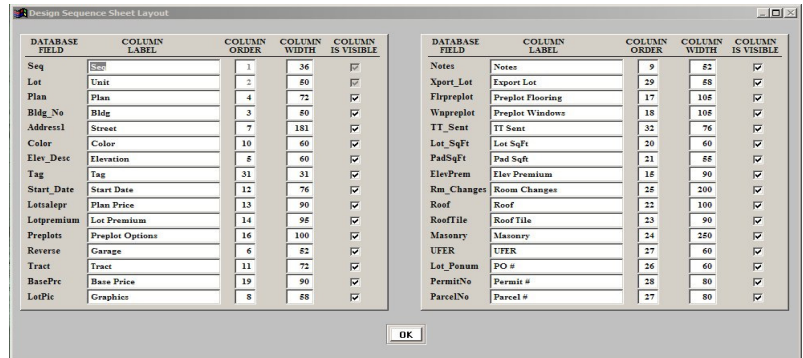
Web Link	This feature allows you to assign user ID's and passwords for your buyers/lots for our web based interface Webview. For details please refer to the Webview user guide.
Exclude Plans	This where non-spec builders can specify which plans cannot be sold on each lot.
Costs	Found on the bottom left of this screen this is used to enter project related costs for the <i>Lot Cost and Profit Summary</i> report in the <i>Options Plus</i> module.
Sales Price	Allows entry of Base Price and Premiums affecting the lot without having to tab to the right on the grid.
Save	The Save button will save any changes made to the sequence sheet.
New	Allows you to set up or add additional lots to a sequence sheet. Refer to the <i>Setting up Lots</i> section on the previous page.
Delete	The Delete button deletes the lot and all information associated with it including, all buyer information, options, and service requests. Be careful when using this function.
Replace Lot	This is the only way to change the lot number of an existing lot without deleting the actually lot. It will safely interrogate the entire database and replace the lot number throughout the system.
Subs	Allows you to assign subcontractors (by trade) that will be working in <i>this</i> specific phase. To do this you must have all your subcontractors setup (see page 13). Subcontractors are assigned to a job by selecting the desired trade after which a list of available subcontractors will be displayed. <i>Double click</i> on the desired subcontractor to move them into selected status. The Subs button effects both the <i>Options</i> and <i>Customer Service</i> modules. It is especially important for people using the Customer Service module as a standalone product.
Docs	Provides you with Contract Document Tracking capability. All the key information updated here will print on the <i>Contract Status</i> report. As contracts are created in the <i>Purchasing Power</i> module the Doc# will be updated.
Plans	Allows you to modify or setup the plans for this phase/sequence sheet. Please refer to the <i>Setting up Plans</i> section on page 10 for details.
Revs	Provides the ability to track revisions to the construction sequence sheet and enter notes that will print on the sequence sheet. You will be prompted to change the revision log each time you exit the sequence sheet.
Print	This prints the Sequence Sheet showing all the lots in the phase together with plan and elevation and mix information. Under Setup: Company Config you can also customize and create your own signature fields that will appear on the bottom. Please refer to page 16.

Exit

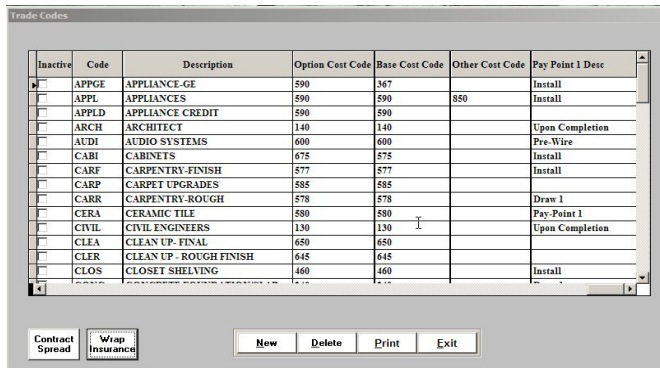
Exists the sequence sheet but not before prompting you to save any changes and to change the revision log if you need to.

Define Sequence Sheet Screen Layout

This screen allows the user to customize the look and feel of the sequence sheet. You can define what columns are visible, what order to view the information in and you can customize the column names for display. *It should be noted that this customization of the screen does not affect the standard sequence sheet report.*



Setting up Subcontractor Trade Codes



Before you setup subcontractors you will need to setup your trades and there associated cost codes. Our system comes with a default list of suggested trades which can be customized and changed to suite your needs. This list of trades is used to describe what type of work each subcontractor does and where any monies associated with that work gets accounted. See the next section on setting up subcontractors for details.

To add, change, delete, or list all the trades currently in the system go to **Setup: Subcontractor Trade Codes**. Select **New** to create or add a new trade. You will initially be prompted to enter an internal code to represent the trade (not cost code – although it can be). This **Code** should be a short 4-6 character abbreviation to describe that trade. The trade **Description** can be up to 50 characters.

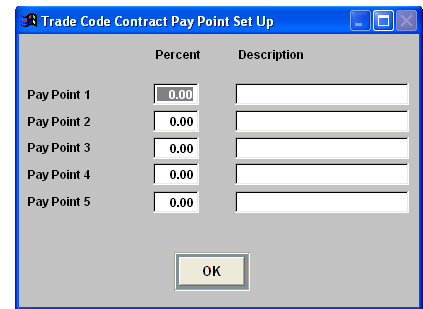
The three **Cost Code** columns allow you to enter the relevant accounting cost codes and can be up to 12 alpha-numeric characters. The **Option Cost Code** is for options, the **Base Cost Code** is the main or general base cost code is used for contracts, and the **Other Cost Code** column is used as the default cost code for standard or miscellaneous PO's. It is recommended that you enter the correct accounting cost codes into each of these columns even if they are the same. This will ensure that they print correctly in the relevant reports and documents.

As you scroll to the right you will see the columns for pay point descriptions and percentages. These are used in conjunction the Purchasing module to create the pay schedule for contracts. The **Contract Spread**

button (on the bottom left) opens the window pictured to the right that allows you to enter these pay increments (or payment points) conveniently. We allow up to five pay points per trade code. For more information please refer to the *Purchasing Power* manual.



The **Wrap Insurance** button at the bottom allows the user to designate particular trade(s) as Wrap Insurance trades. When selected, the user is presented with a check box and applies to the trade currently selected on the grid. This flag will be used for special contract change order process in the IBSWIN Purchasing module.



The last column **Homeowner Report** is used to specify the trades that you would like to isolate on the customer service Homeowner Report if you use it. The **Print** button will print a Trade Code list.

Setting up Subcontractors

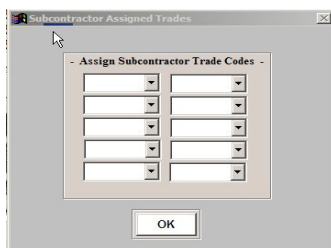


IBSWIN allows you to create a database of subcontractors with whom you do business with. These can either be entered manually or it is possible to import the subcontractor information from an existing spreadsheet (*please contact us for more information*).

To add, view, change, or delete a subcontractor in IBSWIN go to the **Setup: Subcontractors** menu and make the necessary modifications. To add a new subcontractor select the **New** button and assign an alpha-numeric **Sub Code**. This sub code can either match the vendor codes in your accounting software or you can use your own. Then enter its name and additional contact details.

Assigning a Trade(s) to a Subcontractor

In IBSWIN it is necessary to assign trades to each of your subcontractors. This will help identify the type(s) of work that the subcontractor does and also identifies which accounting cost code (as defined in the **Subcontractor Trade Code** screen) any costs get committed to. To assign a trade, click on the **Trade** button in the **Trades Assigned** column.



You will then be presented with a screen that will enable you to assign up to 10 trades to your selected subcontractor. By clicking on the down arrow to the right of each field, you can select from a dropdown list whatever trade is appropriate.

If a subcontractor works in more than 10 trades, you will need to create an additional subcontractor entry and assign the remaining trades (up to another 10) to this

subcontractor record. To save time you can easily duplicate/copy the existing subcontractor record along with all its details using the **Copy** button. In doing so, you will need to enter a new unique **Sub Code** to differentiate the different entries. *We recommend adding a trailing number on each code for the same subcontractor for consistency.* Then each entry can be assigned to a different set of trades. For example, if Joe's Plumbing has a sub code of JOEPL then you would use JOEPL2 for the second entry.

Important Note: Trades only need to be assigned to direct construction or onsite subcontractors, and only to trades/cost codes that will have contracts or options PO issued to them.

The other column of note is **Export Sub**. The Export Sub column is used specifically for exporting purposes. If you are exporting to a compatible accounting program and your **Sub Code** does not match the vendor or subcontractor code in accounting, then you can use this field to specify the correct code. This is especially necessary for subcontractors who work in more than one trade (as mentioned above). Some of these fields are used as merge fields that can be inserted into your contract documents. The best way to access all of the fields (plus many new additional ones) is through the **Profile** button as described below.

Subcontractor Buttons Defined

Profile	This screen provides a graphical view of all the columns and the buttons found in the subcontractor screen. This makes it far easier to view and/or enter any additional information that is entered in the subcontractor database.
Window Covering	Allows you to enter certain variables related specifically to the Window Coverings module. Please refer to the relevant user guide for more information.
Flooring Setup	Allows you to enter certain variables related specifically to the Flooring module. Please refer to the relevant user guide for more information.
Counter Tops	Allows you to enter certain variables related specifically to the Counter Tops module. Please refer to the relevant user guide for more information.
Contract Spread	Allows you to enter the payment increments (or payment points), by percentage, over the duration a contract. This function is for the Purchasing Power module. Also viewable in the profile screen.
Web Link	This feature allows you to assign user ID's and passwords for your buyers/lots for our web based interface Webview. For details please refer to the Webview user guide.
Copy	Allows you to duplicate the selected subcontractor to assign it a different trade code.
Find	Enter a portion of the subcontractor name to do a search.
Delete	Deletes a specific subcontractor record.
Notes	Attach special notes to that vendor. This will print on various vendor lists.
Print	Print subcontractor listing reports in one of the many formats offered.
Exit	Return to the main Setup menu.

Assigning Subcontractors To Phases

The final step in getting ready to start using the IBSWIN Purchasing function for both Contracts and / or Option Purchase Orders is to assign the subcontractors to the phase. This can be done in one of two ways:

1. Awarding a subcontractor the bid in the Purchasing module –

As the screen at the right illustrates, subcontractors can be awarded the contract for a specific trade and that will automatically assign them to that Trade for all purchase orders for that phase as well.

Rev #	Subcontractor	Bid Date	Total Bid	Comments / Description	Notes	Award Dd
	CWS CONCRETE	09/28/2009	37850.00			09/28/2009
	FRED'S CONCRETE	09/28/2009	37775.00			12/31/999

2. Use the 'Subs' button in the Maintain Sequence Sheet or Buyer Options screen –

Assign subcontractors to each Trade code and use it to copy subs from phase to phase. If you don't have the Purchasing module, this is the only way subs can be assigned to a phase.

Seq	Lot	Bldg	Plan	Elevation	Garage	Street	Graphics	Notes	Color	Tract	Start Date
01	1000		CUST			01155 Hollow Way	Add Graphics	Add Note			07/01/2010

Customization and Configuration

Under the **Setup** menu you will find many selections that are specifically related to customizing and configuring **IBSWIN** to suite your operational requirements.

Note: It is recommended that after the initial setup of your software that these areas be accessed only by system administrator as they can adversely effect how the program operates. If multiple users are setup (see page 29) the administrator can restrict access these areas.

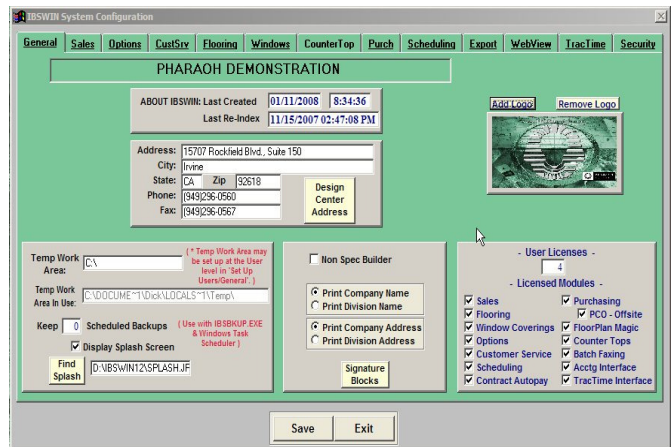
Company Configuration

The first step to customizing and configuring your software is to let it know how to work for you. This can be done from the main menu under **Setup: Company Config**. The **tabs** at the top of this screen (pictured below) are used to setup various global options for each module. Your Pharaoh trainer will review the pertinent ones with you at your initial training session. Below is tab by tab breakdown of some of the setting available to you.

General

This screen is where you can review your standard company information. It is here that you can modify your company's address, select if you want to display the **splash** logo screen, and determine whether you want to print the division name and/or address on the various documents produced by the system. The company name and address fields are checked by default.

Note: Your company name cannot be modified. This is part of our license control and can only be modified by Pharaoh Information Services.



The **Temp Work Area** is where **IBSWIN** will store any temporary files that it creates. By default this is the Microsoft Windows variable TMP however this can be changed to another directory if necessary. Please speak to your Pharaoh consultant or system administrator before changing this setting as it affects every user and may render the system unusable.

The **Signature Blocks** button allows you to create custom signature blocks for your sequence sheet and some reports. For more information on creating a signature block see page 19.

Add Logo allows you to attach your company logo to **IBSWIN**. This will then print on the top left of your PO's, work orders, pay schedules, etc. The image file must be in .jpg format.

Design Center Address allows for an alternate name and address on some reports from the **IBSWIN** Design Studio modules.

Sales

The sales screen has two main sections. The first allows you to select which tax district applies to you (if applicable):

Mello Roos: For properties in a Mello Roos Tax District (CA).

Spec Assmt: Used for builders outside of California that use special assessments.

Note: If neither of these options apply to the property that you are working on, no figures will be affected as long as you do not enter any figures in Mello Roos or SID/LID field in the Sales module

Ordered Options Less “Cash Option”: It is checked if you want exclude “Cash Options” from the sales price of the house.

AUTO Sales Letters: This changes the sales auto letters default trigger date from # of days before 2nd estimated close of escrow date to # of days after sale date.

The second section is for customizing and defining your own sales escrow screen fields. Any changes will affect how these fields appear on screen and print on your flow sheets.

Key Measure Base Days: are parameter settings used in the production of the ‘Key Measures’ report found in Sales Reporting.

The **Add Standard PO Signature** allows you to attach a scanned signature to IBSWIN. This will then print on the bottom of your PO’s. The image file must be in .jpg format.

Options

Options Ordering Is RETAIL Only: This is only applicable if you are using IBSWIN for options ordering only and do not track costs or generate PO’s.

Generate PO’s By Subcontractor Name: Changes the way in which PO’s are generated. A sub with multiple trades would get 1 purchase order.

Archive Option Cancellations: If this check box is marked then all cancellations will be reported in a cancellation table.

Disable Auto Price Changes: Use this option to disable the Auto Price Changes feature when updating options costs.

Option Setup Price Unchanged With Zero Margin: If you have a zero margin in options groups than IBSWIN will not calculate a retail price.

Use Option Group Cost Code For Pre-Plot Option PO's: If you check this box then the system will override the cost code setup in the trade screen with the cost code from the option group screen when PO's are generated.

Modify Ordered Option Types: If this is checked, it will allow you to modify the option type of options that have been ordered from PR to O.

Generate Option PO's With Current Costs: This check box tells the system to use the current cost in options setup when you generate the PO's

Option Standards Generate Contract CC's: This check box tells the Purchasing system to create Change Orders to Contracts when Upgrade Options are ordered that have been set up with special credits to the standard contract.

'Ask' If Option Extra is Detail For Another Option: If checked, the Options user is asked if the option detail for an 'Extra' is to be attached to a previously ordered option.

Purchase Order Title: This will allow you to choose a different name for your POs to print on POs and the print screen from within an order.

Purchase Order Number is: This will allow you to choose a different name for your PO numbers to print on POs.

Purchase Order Number Ref: How the purchase order number is referenced on the Option PO report.

Option Order Title: This will allow you to choose a different name for your Option Orders to print on Options Order and the print screen from within an order.

Override Auto Option Numbering: If this check box is marked then the user will be able to manually change Option Numbers that are automatically assigned by **IBSWIN** during Option Setup. In addition, the numbering gap between options can be defined.

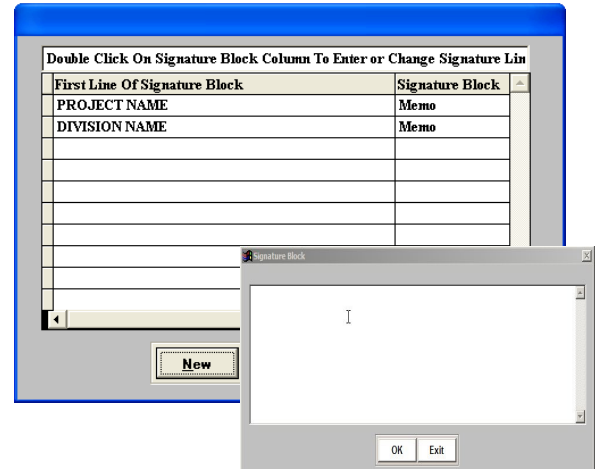
Back Charge Custom Verbiage Selections: There are two customizable comments or disclaimers that can be added for Back Charge document customization.

PO Legal Verbiage: Enter the legal verbiage to appear on your purchase orders.

Option Order Disclaimer: Enter a custom disclaimer to appear on the bottom of option orders.

Option Book Disclaimer: Enter a custom disclaimer to appear on the bottom of Option Book report.

Signature Blocks: Allows you to create custom signature blocks for some reports. To create a signature block, select **New** and then *select* the highlighted **memo** which will appear. In the screen provided, enter/create your signature block exactly as you would like it to print including the lines (using the extended dash). The first line in this screen is reserved as a header to name the signature block and will not print. To view an existing signature block, click on **memo** in the second column.



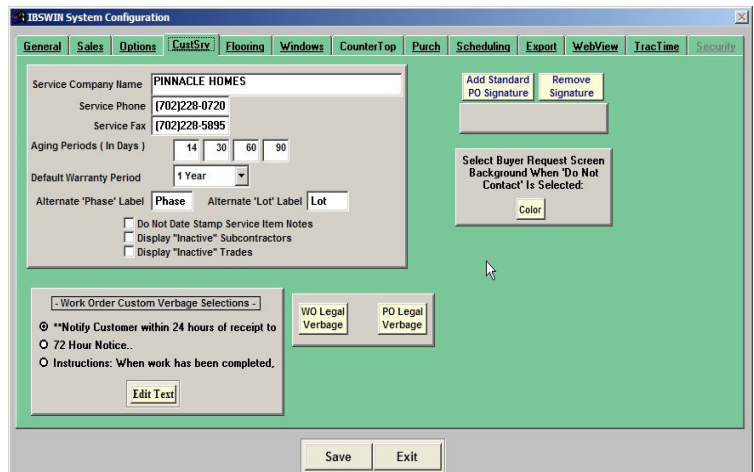
Customer Service

Service Company Name, Phone, and Fax:

You can enter alternative contact information that will print on work order forms.

Aging periods (in days): Enter the aging periods (in days) that your company normally uses. The days entered will affect certain reports generated in the Customer Service module. (i.e. which items have been completed by the 14th day, 30th day, 60th day, and then by the 90th day).

Default Warranty period: Select or change the default warranty period of 1 year.



Alternate 'Phase' & 'Lot' Labels: Rename references to *Phase* and *Lot* to your company's preference.

Do Not Date Stamp Service Item Notes: Disable date stamp application to notes in service items.

Display "Inactive" Subcontractors: Subcontractors marked as *inactive* will be displayed in drop down menus for selection in service items.

Display "Inactive" Trades: Inactive trade codes are displayed for selection in service items.

Select Buyer Request Screen ‘Color’: If you mark the buyer as a ‘Do Not Contact’ buyer in the Buyer Request screen, you can select a background color as an *alert*.

WO Custom Verbiage: Select one of the three verbiages to be printed on the work order. You may also customize any one of the preceding three options by clicking **Edit Text**.

Flooring

Combine Flooring Supplier & Installer PO’s: If this box is checked then the supplier & installer are printed on the same PO’s globally.

Ask for Grout Color When Order Is Initialized: With this box checked you will be asked for grout color the first time the order is opened on the standard products.

Ask For Grout Color When Tile Is Upgraded: With this box checked the designer will be asked to enter the grout color for upgraded products only.

Retail Price For Extras Added To Rooms With Standard Products, Will Be Zero:

Exactly as the description specifies. If extras are added to room that has the standard product then any extras will be added with a retail price of zero.

Round Flooring Orders: This will make the system round your orders off to the nearest dollar.

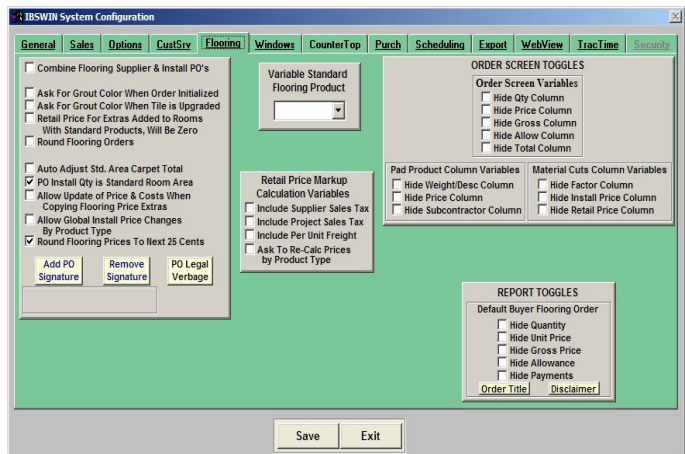
Auto Adjust Std. Area Carpet Total: When using the optional room function, IBSWIN can automatically adjust the optimal cut measurements based on rooms being added or subtracted in the order.

PO Install Qty Is Standard Room Area: When Install PO’s are generated the Qty used will always default to the default room Qty rather than the calculated figure used for materials.

Allow Update of Price & Costs When Copying Flooring Price Extras: If checked, flooring product extras will update the price and cost for the same product already existing in phases that you are copying flooring products to.

Allow Global Install Price Changes by Product Type: In Setup/DesignStudio/Flooring/Product Types, you can adjust the install cost for a specific product type. This cost will be used to change the install cost of all flooring products of that type for selected phases, if this box is checked.

Round Flooring Prices To Next 25 Cents: automatic rounding up routine as indicated.



Add PO Signature: Allows you to attach a scanned signature to IBSWIN. This will then print on the bottom of your PO's. The image file must be in .jpg format.

Remove Signature: Allows you to remove the file you added in the above step.

PO Legal Verbiage: Enter your own custom legal verbiage to appear on your purchase orders.

Variable Standard Flooring Product: If a flooring product in the drop down list is selected, the selection will be listed as a 5th standard/default product type. This is in addition to carpet, wood, vinyl, and tile. If nothing is chosen Vinyl Tile is the default.

Retail Price Markup Calculation Variables: allows you to include supplier and/or project tax as well as per unit freight fees in the calculation of the retail price for flooring products.

Order Screen Toggles: Each of the check boxes below allows you to hide various columns from the ordering screen.

Report Toggles: These check boxes allow you to hide quantity, unit price, gross price, allowance or payments for the *default* flooring order report.

Windows

Round Window Covering Orders:

Automated ordering rounding to eliminate pennies.

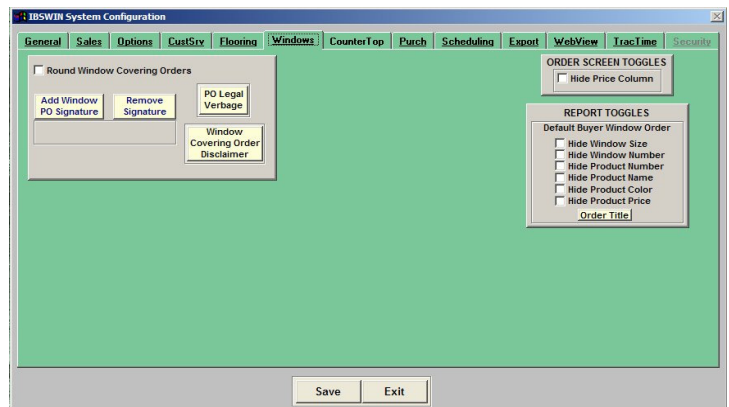
Add PO Signature: Allows you to attach a scanned signature to IBSWIN. This will then print on the bottom of your Window PO's. The image file must be in .jpg format.

Remove Signature: Allows you to remove the file you added in the above step.

PO Legal Verbiage: Enter and legal verbiage to appear on your Window PO's.

Window Covering Order Disclaimer: Enter a custom disclaimer which is to appear on the Window Order.

Order Toggles / Reports Toggles: provides a way to custom tailor window order screen and reports as required.



Counter Tops

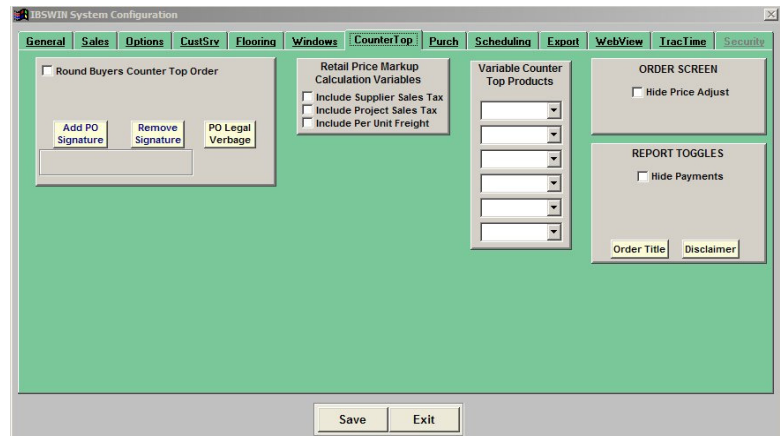
Add PO Signature: Allows you to attach a scanned signature to IBSWIN. This will then print on the bottom of your PO's. The image file must be in .jpg format.

Remove Signature: Allows you to remove the file you added in the above step.

PO Legal Verbiage: Enter custom legal verbiage to appear on your purchase orders.

Variable Standard Counter Top Product: Allows you to select a custom counter top product type to be used as one of the standard/default types. If nothing is chosen Marble is default.

Retail Price Markup: Calculation variables to be used when calculating the retail price for your products.

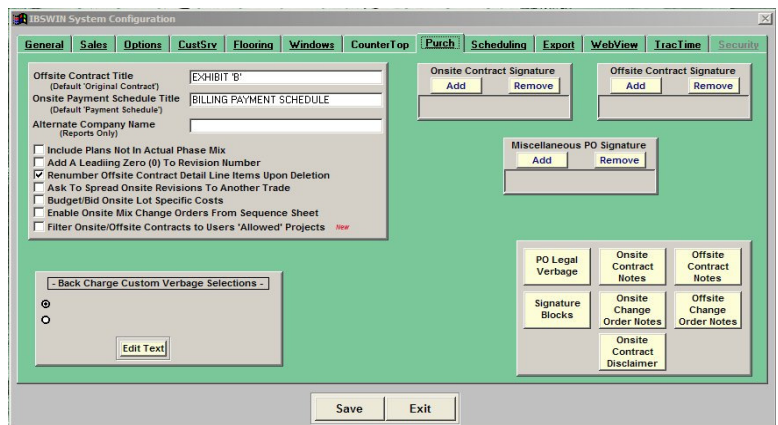


Purchasing

Offsite Contract Title: Enter a title for offsite contracts here, or use the default *Original Contract*.

Onsite Payment Schedule Title: Enter a title for the onsite payment schedule, or use the default *Payment Schedule*.

Alternate Company Name: Alternate company name for use on purchasing reports.



Include Plans Not In Actual Phase Mix:

This function is specifically for those using the bid master phase. Any contract awarded from the bid phase will automatically have every plan elevation included for copying purposes.

Add Leading Zero To Revision Number: Add a leading zero to the revision/change order number. It is recommended to have this checked off so that change orders sort correctly.

Ask To Spread Onsite Revision to Another Trade: This function activates the prompt to create change orders to contracts using a different cost code/trade.

Budget/Bid Onsite Lot Specific Costs: This function allows for an entry to be made in Onsite bids and budgets for lot specific costs not normally applied by Plan/Elevation.

Enable Onsite Mix Change Orders From Sequence Sheet: This function enables the generation of Mix Change Orders to Contracts if a Plan/Elevation is changed in the sequence sheet and Onsite contracts have been generated for currently selected phase. Process is performed in the sequence sheet.

Filter Onsite/Offsite Contracts to Users ‘Allowed’ Projects: This function will limit the contract available to a users based on the project security setup.

Verbiage Selections: There are numerous options for changing or adding custom verbiage to various Purchasing Power documents.

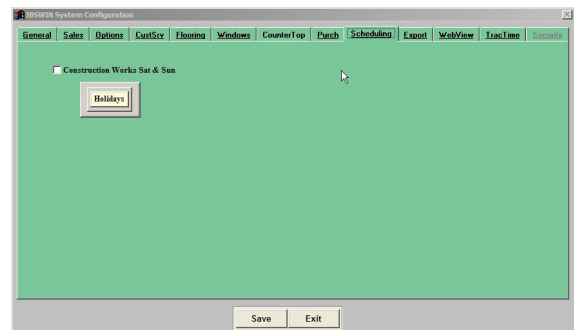
Add Standard PO/Onsite Contract/Offsite Contract Signatures: Allows you to attach a scanned signature to IBSWIN. This will then print on the bottom of your PO's, Onsite and/or Offsite contracts (default report formats only). The image file must be in .jpg format.

Construction Schedule

Construction Works Sat & Sun: Check this if your subcontractors work on, or consider, Saturdays and Sundays as part of the regular work week. Otherwise, the scheduling module will recognize only Monday through Friday as work days.

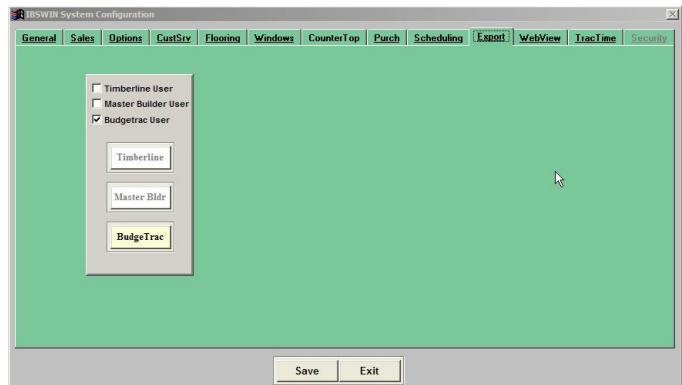
Holidays Button: When selected you may enter the dates and the descriptions of any holiday that your company will observe.

Note: Holidays must be entered at the beginning of each year.



Export

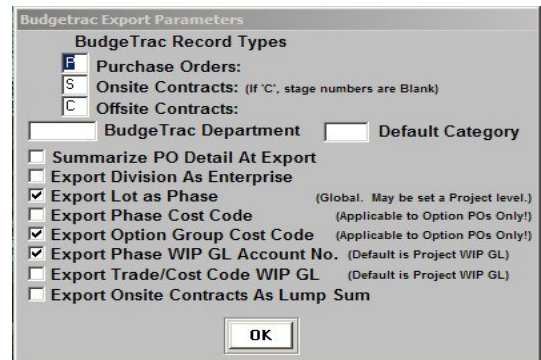
When selecting this tab, you will have three buttons to choose from, Timberline, Master Builder and BudgeTrac. These are the three accounting programs that IBSWIN is currently integrating with. To enable access to export parameters, you must select the appropriate accounting system.



BudgeTrac

Below is a description of each option available for **BudgeTrac export**. You will need to know some cost code related, and accounting related procedures to determine the necessity of some of these options. Please contact Pharaoh for assistance.

BudgeTrac Record Types: Tells IBSWIN which BudgeTrac modules to export the 3 different commitment types: P - Purchase Orders, S - Staging, C - Contract Management.



BudgeTrac Department: Assign the BudgeTrac Department code if applicable.

Default Category: Enter the correct/default BudgeTrac category if applicable.

Summarize PO Detail At Export: This exports PO's as total number rather than a detailed line-by-line listing.

Export Division As Enterprise: To use *Export Division* in IBSWIN as the *Enterprise* number/code in BudgeTrac.

Export Lot as Phase: Exports the *lot number* used in IBSWIN as the *Phase* code used in BudgeTrac. Use only if you are doing lot level accounting in BudgeTrac.

Export Phase Cost Code: Uses the cost code field in the phase screen as the cost code for all options PO's. This overrides the option cost code through out IBSWIN.

Export Option Group Cost Code: Similar to previous check box except uses the cost code field in the options groups screen for all options PO's.

Export Phase WIP GL Account No.: Select this to export the *WIP GL Account Number* found in the phase screen instead of the default *Project WIP GL*.

Export Trade/Cost Code WIP GL: If selected, a GL Account column is opened up in the Trade Code screen for the Option, Base and Option Cost Codes. And entry in these will be exported to Budgetrac.

Export Onsite Contracts as Lump Sum: Onsite contracts will be sent to BudgeTrac as a one line entry.

Timberline

Below is a description of each of the options available for *Timberline export*. You will need to know some cost code related, and accounting related procedures to determine the necessity of some of these options. Please contact Pharaoh for assistance.

Timberline Job Field Setup: To export to Timberline each commitment in IBSWIN must have the correct Timberline job code. Since this is highly customizable in Timberline IBSWIN allows you to define how it should build this code using existing fields in the *Project*, *Phase*, and *Sequence Sheet* screens. To this you may need assistance from a Pharaoh consultant.

Char: Determines how many characters are used prior to the separating character.

Sep: Allows you to specify the separator (/, *, -, etc.) to divide the job field codes.

Timberline Extra: Use this list box to enter an extra job field for Option PO's only if applicable.

Jobcost Category: Enter the appropriate Timberline job cost category code if applicable.

Default Offsite Lot: Specifies the lot number to be used in an Offsite Contract.

Default Contract Change Order Status: Specifies the state of the contract when exported to Timberline.

Export Insurance On Contracts: This will allow you to export the insurance information with the selected commitment.

Summarize Onsite Contract Export: This export the onsite contacts as a total rather than being broken out by pay points.

Export Phase Cost Code: Uses the cost code field in the phase screen as the cost code for all options PO's. This overrides the option cost code throughout IBSWIN.

Export Option Group Cost Code: Similar to previous check box except uses the cost code field in the options groups screen for all options PO's.

Export Onsite Contract As Lump Sum: Onsite contracts are exported as a lump sum total without any detail.

Summarize Onsite Contracts By Pay Point: Similar to above except you get a lot by lot total instead. Costs will not be broken out by pay point.

Master Builder

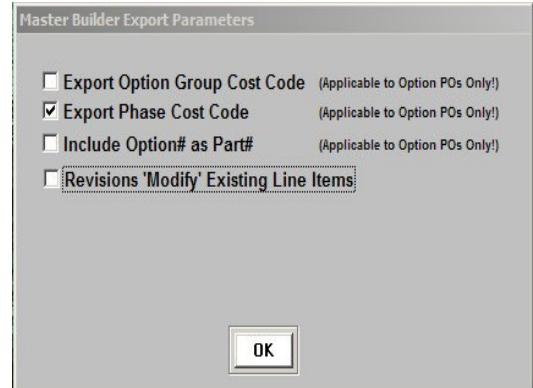
Below is a description of each of the options available for ***Master Builder export***. As of this publishing, Master Builder only exports IBSWIN purchase orders. Other commitment types can be added. Please contact Pharaoh for assistance.

Export Phase Cost Code: Uses the cost code field in the phase screen as the cost code for all options PO's. This overrides the option cost code throughout IBSWIN.

Export Option Group Cost Code: Similar to previous check box except uses the cost code field in the options groups screen for all options PO's.

Include Option# as Part#: Uses the IBSWIN Option Number as the Master Builder part number.

Revisions 'Modify' Existing Line Items: When checked, IBSWIN PO revisions will modify existing Master Build PO lines, otherwise, each line becomes a new line in Master Builder.



Web View

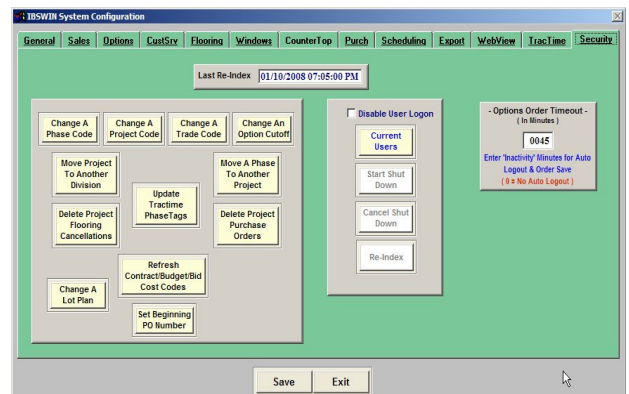
Please refer to the *Webview* user guide.

TracTime

Please call Pharaoh for assistance. This is usually configured by your TracTime consultant.

Security

This tab is only available to users who have the ***Allow Admin User Functions*** checked in their user profile under the general tab in the setup user



screen. Most of the functions found here can only be performed when all users are logged out of IBSWIN.

Disable User Logon: This feature allows you to lock users out of IBSWIN while you are doing maintenance. When selected, the 'Start Shut Down', 'Cancel Shut Down' and 'Re-Index' command buttons are enabled.

Start Shut Down: Starts a 10 minute procedure that warns existing users in IBSWIN of impending system maintenance. At the end of the warning period, users are completely logged out of IBSWIN. During this process, the procedure sends out a file, 'Application-Closedowns.\$\$\$', into the IBSWIN directory on your server. The presence of this file will keep other user from logging into IBSWIN. The file is automatically deleted once the Shut Down procedure is finished. At the end of the Shut Down procedure, you will be notified that all users have been logged out and you can re-index or complete whatever process you needed to complete without user interference. Should you need to abort the Shut Down before all users have been logged out of IBSWIN, select the **Cancel Shut Down** command button. This cancels the Shut Down and notifies existing users that the Shut Down process has been canceled.

Re-Index: Allows you to re-index the IBSWIN database without leaving the Security screen.

Current Users: A method to see who still maybe logged on to IBSWIN.

Options Order Timeout: Setting a value (in minutes) here, will automatically log IBSWIN users out of their buyers option order screen if this time limit is exceeded and there has been no activity in the screen. *The existing buyers order is saved be for this logout procedure.*

Change a Phase Code: This will allow you to correct or modify a phase code that may have been entered incorrectly.

Change a Project Code: This will allow you to correct or modify a project code that may have been entered incorrectly.

Change a Trade Code: This will allow you to correct or modify a trade code that may have been entered incorrectly.

Change An Option Cutoff: This will allow you to replace on option cutoff to another on all or selected phases.

Move A Project To Another Division: Moves an entire project and its related data to another division.

Move A Phase To Another Project: Moves an entire phase and its related data to another project.

Update Tractime Phase Tags: Updates the sequence sheet Tag field for Tractime users using this field.

Delete Project Flooring Cancellations: Allows purging of the flooring cancellation file, since it can get fairly large quickly.

Change a Lot Plan: Allow you to change the plan on a specific lot. Caution should be used here as contracts may have to be refreshed and re-spread do to this mix change.

Refresh Contract/Budget/Bid Cost Codes: If you change your accounting cost code/s for a trade/s, then you will need to use this feature to propagate that change to all existing contracts, budgets, and bids for exporting purposes.

Delete Project Purchase Orders: This feature allows you to delete *ALL* PO's (except Customer Service PO's) in a project. This will help reduce over head in the IBSWIN database. As always, backup your database before deleting PO's.

Set Beginning PO Number: Allows a new client to set the starting value of PO's to something other than 1.

Users

If you wish to add greater security you can do this by creating multiple user accounts with individual user ID's, passwords, and accessibility restrictions.

Found in **Setup: Setup Users** you can modify different user accounts by selecting the **Find** button. Select the account you wish to edit from the master list and click OK. Then you will be returned to the main configuration screen.

The account you are editing will always appear at the top of the window displaying the **Login ID, Password, and User Name**. The various security options are sorted by module via tabs (as pictured). Some of the selections will allow read-only or no access (to parts of the database), by project only, or any combination thereof. You will only be able to modify the items applicable to the modules your company has purchased. Pharaoh has an [Expanded User Security Guide](#) to further assist you or contact support at Pharaoh.

Force Off Users

This function is found under the Tools menu and is primarily used to force a user off the IBSWIN system. While this may have many uses is also helps eliminate a potential login error which states that your user ID is already in use. This can occur if someone else logged in using your user ID and password however also happens if IBSWIN was closed down incorrectly, or abruptly, in a system crash. To correct this, log on to IBSWIN using *login ID: pharaoh* and *password: pharaoh*. Then go to **Tools: Force Off Users** under the main menu. A list of active users will appear. Highlight *your* user ID and select the **Force the User Off** button. Exit and then restart IBSWIN. You should now be able to log on like normal. The procedure for forcing of any user/s is exactly the same as outlined above however you will not need to exit the program afterwards.

Please Note: Always notify a user before forcing them off. Forcing off users whilst they are using or updating the database can result in loss of data and a potential crash on their workstation.

Reindex

Found under the **Tools** menu (and in Company Config/Security), this is a special *house keeping* function and should be run on a regular basis to keep the database operating as efficiently as possible. Since **IBSWIN** is a relational database, this function corrects any data or indexing problems and optimizes the application. We recommend that this process is run weekly.

Please Note: Everybody must be logged out of IBSWIN to be able to Reindex the database. If you are aware of any loss of data in your system DO NOT Reindex your database. This will result in a permanent loss of data - IF there was any chance of recovery.

Troubleshooting IBSWIN

“Codes, Subs, Groups, etc. not assigned” Error message.	<ul style="list-style-type: none"> Make sure the setup process was fully completed. Several databases are dependent on one another. If any one of the setup stages is incomplete, the error message will appear when the database is opened.
Already logged on message box.	<ul style="list-style-type: none"> If you are out of the system (are logged off) and upon attempting to log back on and you receive a message that says that you are already logged on, please use the following procedure: <ul style="list-style-type: none"> Log on to IBSWIN using the login ID: pharaoh and password: pharaoh. Once logged in select Tools:Force Off Users under the main menu. Highlight your user ID shown in the list of “Users who are currently logged on” window and select the Force the User Off button. Exit out of IBSWIN and then restart it. Now you should be able to log on with your usual login ID and password.
Auto Margin issues.	<ul style="list-style-type: none"> If Auto Margin is changed after the effected fields have already been entered, changing the Auto Margin field will not automatically update each field. After the Auto Margin has been changed, you must update each field by tabbing through the costs for each product.
Company Config. – Cannot change the company name.	<ul style="list-style-type: none"> The grayed out company name text box cannot be changed without the aid of Pharaoh. The name is connected with the license control and prints on many reports.
Description field is not showing everything.	<ul style="list-style-type: none"> In many cases the description field is limited to 50 characters. You may be able to enter additional descriptions under Notes.
Error message box causing IBSWIN to close.	<ul style="list-style-type: none"> If an error alert pops up do not click on Cancel. Always click on the Ignore button. You may have to repeat this process several times until the error message box stops appearing. <p>By pressing Cancel the system may close down and exit you out. In the event that this does happen and you receive a message stating that you are already logged on when you attempt to get back into IBSWIN. If that is the case, please follow the instructions under the Already Logged on Message Box above.</p>

Grayed out menu items / reports	<ul style="list-style-type: none"> If you need reports or menu options that are currently grayed out, please see your system administrator. You currently do not have access to those areas. <p>System Administrators: to update user permissions please go to Setup: Setup Users</p>
IBSWIN, and/or the system shuts down, and/or freezes, and/or is running too slow.	<ul style="list-style-type: none"> Please check to see if you are opening too many windows/programs at one time. You may not have enough memory in your computer to handle all the windows/programs being used at once. Reindex the database, this can be found under Tools: Reindex Database Also reference the instructions under the Error message box causing IBSWIN to close above. This behavior can occur after an error message box appears, or after clicking on a dropdown list button too many times. If a button does not seem to work immediately after being clicked, be patient. Your computer hardware may not meet or barely meets the IBSWIN minimum requirements. Performance can be severely affected on slower computers. Always select the desired button once and wait for the computer to complete the necessary processes.
Note button does not appear / or stays red after entering a note.	<ul style="list-style-type: none"> In the Options module the cursor must be in the <i>Qty</i> column in order to view the red Note button.
Reindex – system will not allow a reindex.	<ul style="list-style-type: none"> Someone may be working on IBSWIN. Please make sure that everyone is completely logged off and the program closed before attempting to reindex the database. <p>Please note that in extreme cases, you may also have to log yourself off, and log back in on another computer to perform the reindex.</p>
Sequence Sheets – “Subs” button does not work.	<ul style="list-style-type: none"> Make sure that you have setup all your subcontractors before selecting the Subs button.
Sequence Sheets – plan numbers do not appear when printed.	<ul style="list-style-type: none"> Make sure that all of your plan numbers are limited to only four characters. Only alphanumeric characters (letters and numbers) in these fields. Spaces and special characters such as -, /, _, etc. will not work.