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**IBSWIN – Webview General User Guide**

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Document No. IBS-8.7-061299-CS

Printed and bound in the United States of America

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## **Overview of modules**

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The purpose of **Webview** is to provide a fully customizable internet-based portal to IBSWIN for specific tasks and purposes beyond what IBSWIN can offer as a desktop application. Using the appropriate security, Webview will allow subcontractors, superintendents, prospects, and home buyers access, review, and input or access certain data through the homebuilders' website or directly in Webview. A brief outline of each application is below:

### **SubView - Subcontractor Bidding, View Schedules, and Document Review**

- You can upload any type of document (or file) for subs to review including plans, bidding documents, scopes of work, and more.
- Automatically upload from IBSWIN purchase orders, work orders, contracts, and options starts and cancellations (coming soon).
- Provides scheduled e-mail notifications of any documents posted to Webview with different e-mails for each department.
- Subs can review, enter, and submit plan/project bids by phase and plan type.
- Complete options bidding and award system that updates awarded costs in IBSWIN.
- Subs can review their construction schedule by phase for trade specific tasks.
- Subs can upload documents to the homebuilder for review and download
- You can e-blast or mass e-mail any or all of your subcontractors at any time.
- You have the ability track all documents that the subs have viewed and when and see the status of all e-mail notifications.

### **SuperView – Superintendent Document Review, View and Update Schedules**

- Superintendents can review all documents uploaded to Webview for the subcontractors to view.
- Supers can view schedules by phase and filter by lots and dates, etc.
- Schedules can be updated directly in Webview and have it update in IBSWIN
- Receive all subcontractor notifications to stay on top of documents they are receiving.

### **BuyerView - Options Ordering & Review**

- Buyers can review and select option wishlists from a full color online catalog using the Webview's shopping cart feature.
- Upon submitting options wishlists, they are download to IBSWIN for review and automated e-mails are sent to all appropriate staff.
- Buyers can view the status of their home with images, and the current construction stage.
- They can see any documents that have been uploaded for them to view, like homeowner's manuals
- You can review orders prior to releasing it into the main IBSWIN options system.
- Can create buyer demographic questionnaires and surveys for further analysis and reporting.
- You can create a full color options catalogues in PDF format to print or use in your design center.
- You can e-blast or bulk e-mail selected homeowners.

**ServiceView - Customer Service Requests**

- Homeowners have the ability to enter and track service requests online.
- Automated email is sent to customer service department and is also downloaded to IBSWIN.
- Provides ongoing feedback mechanism between customer service department and homeowner.
- You have the ability to upload documents for homeowner to view and access online.
- You can e-blast or bulk email selected homeowners.

**InterestView – Sales Prospect & Demographic**

- Allows prospects to input their contact information via your website and into IBSWIN
- Can collect broker information and update IBSWIN,
- Provides the ability to setup complete demographic questionnaires for prospects to fill out and provide analysis reporting.

## Introduction

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The implementation of Webview is easier than any of the other modules or add-ons for IBSWIN. The reason for this is simple; you have already done most of the work in IBSWIN. Webview allows your subcontractors, sales and options staff, prospects, and homeowners interact with your company via the internet. By following the steps outlined in this guide you will be pleasantly surprised at how easy the implementation of Webview is.

### What to expect after your initial purchase.

---

#### ***Step 1: You will need to update IBSWIN***

Once we inform you that we are ready you will need to update IBSWIN with the latest download from our website. This will activate the Webview modules that you have purchased. For instructions on how to do this please call our support department or ask you IT person or controller to do this.

#### ***Step 2: Save an .ini file into the IBSWIN directory on your server***

At some point during the implementation on our side you will be emailed an .ini. This file will need to be saved into the IBSWIN folder on the server where our desktop application resides. This .ini file is critical because it identifies your unique Webview database so that IBSWIN can communicate to your online portal.

#### ***Step 3: Receive your Webview internet link.***

You will be provided with a unique link that will be used to access Webview and allow you and the various users use it. The link will look similar to this: <http://www.ibsWebview.com/wv/yourcompany>. It is important that you do not assume how your company name will appear. Sometimes we will use an abbreviation as many builders have similar names or multiple divisions may also be using Webview.

This link is what you will need to provide to your web designers to incorporate in to your existing website once you are ready to have either your subcontractors, prospects, or homebuyers access the system. Please refer to page 15 for more information about integrating Webview with your company website.



## PART 1 – IBSWIN Setup & Configuration

This portion of the user guide will focus on all the areas that need to be set-up and configured in IBSWIN *prior* to using or being able to login to Webview.

### Creating an Admin User ID and Password

Before going through the module specific setup you will need to create the main administrative user account for Webview. This needs to be done from within IBSWIN otherwise you will not be able to login to Webview.

To do this, go to **Setup: Company Config** and select **Edit**. Then go to the Webview tab. Here you will find the **Webview Login ID** and **Password** fields that will allow you to input your Administrative login ID and Password.

**Important Note:** This will only become active after you do your first synchronization (see page 13) however the other required setup steps for your Webview modules must also be completed for any data from IBSWIN to appear in Webview. This User ID and password is specifically used for Webview administration online. Webview Administration is covered in Part 3 of this guide and begins on page 15.

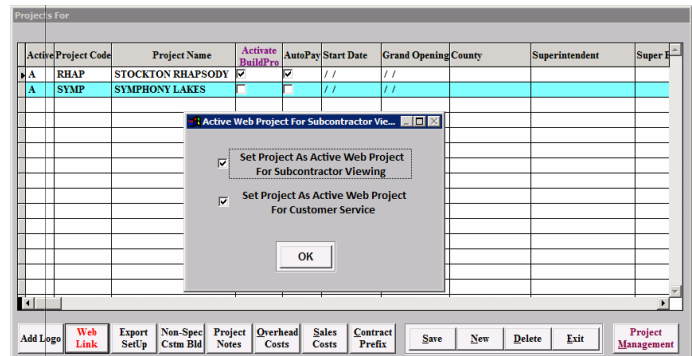
Beside the Admin login ID and Password the only other parameters that can be changed in this screen are related to the purchase orders that can be uploaded from IBSWIN to Webview. Here you can filter the upload by type of PO's and how many days older than today's date that you want available online for your Subcontractors to be able to view. *This is applicable to SubView only.*

## SubView Specific Setup

SubView is the subcontractor document management, onsite bidding, and scheduling portion of WebView. It allows your subcontractors to view project related documents, enter and view onsite bids, and their construction schedule.

### Activating Projects for Subcontractor Viewing & Document Upload

Before any project related information can be accessed in SubView you must first activate any applicable projects in IBSWIN. To do this go to **Setup: Inventory: Projects**. Once in the screen, select the project you wish to activate, and click on the **Web Link** button (bottom left). Check *Set Project Active for Subcontractor Viewing* to activate it.

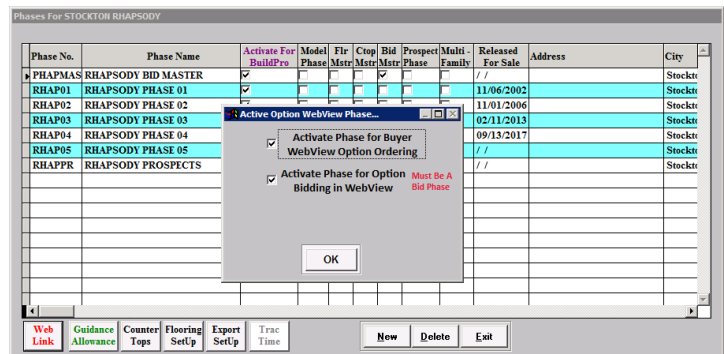


To let IBSWIN know which documents to send to WebView (Option PO's, Contract Payment Schedules, Customer Service Work Orders, or even Standard PO's / Back Charges you must go to **Setup: Company Config** and select **Edit**. Under the WebView tab you can filter the upload by using the appropriate check boxes. You can also specify how old the oldest PO's should be, in number of days, that will be accessible online.

### Activating Phases for Options Bidding

For subcontractors to be able to bid on options you must have options setup in IBSWIN in your bid master phase. Please refer to the *Purchasing Power User Guide* for an explanation of what a bid master phase is.

To activate a master phase for options bidding go to **Setup: Inventory: Phases** and select the project you wish to activate the phases for. When the phase screen opens, select the master phase (that should be checked off as a bid master) and use the **Web Link** button on the bottom left to activate it. Put a check next to *Active Options Bid Phase for Webview*.



## Assigning User ID's and Passwords to your Subcontractors

To give a subcontractor access to SubView you will need to assign them a unique User ID and Password and also filter which projects they have access too.

**Note:** If you do not assign any projects to a subcontractor then the subcontractor will have access to ALL web active projects.

To activate a subcontractor for Webview go to **Setup: Subcontractors** and use the **Web Link** button. Enter their unique **User ID** and **Password** along with any web active projects that you want them to access for documents, bidding, and/or scheduling. *Option bidding will not be active unless you activate the phase. See previous page.*

**Additional Note:** If your subcontractor has more than one trade and you want to activate them for that trade you will need to assign the same user ID for the second version of the same sub. A password is not necessary as Webview will default to the one that was entered prior. You will still need to activate the appropriate projects for each trade. This will ensure that the sub will be able to access information for each trade and project that they need to0.

To print a list of active subcontractors from IBSWIN with their user ID and password go to: **Webview: Active Web Users**. This information can also be viewed from within Webview (see page 20).

## Other Setup Related Items

The remainder of the setup for SubView will be done directly in the Admin portion of Webview (page 19). This can only be done after you have synchronized IBSWIN with Webview (page 13).

## BuyerView and ServiceView Specific Setup

**BuyerView** allows your IBSWIN options to be ordered by your buyers via an online shopping cart. This feature allows you to also add pictures to your options to create a full color catalogue and provides a convenient way for your buyers to view and pre-select options from the comfort of their own home.

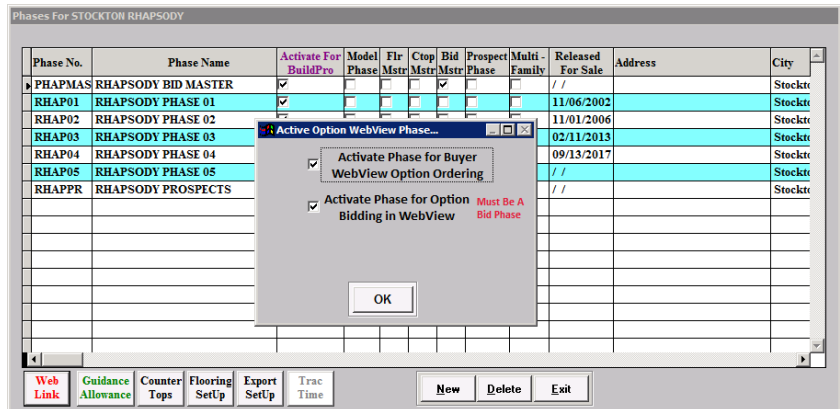
**ServiceView** allows your homeowners to track and submit service requests via the internet which synchronizes with IBSWIN. It provides an excellent and convenient way for your homeowners to get the service they deserve.

Both these modules have similar areas that need to be activated to work. The following section outlines the IBSWIN specific areas required to active these modules for Webview.

## Activating Phases for Options Ordering & Viewing

Before any options related information can be uploaded to WebView you must activate the phases that are going to be accessible to your homeowners.

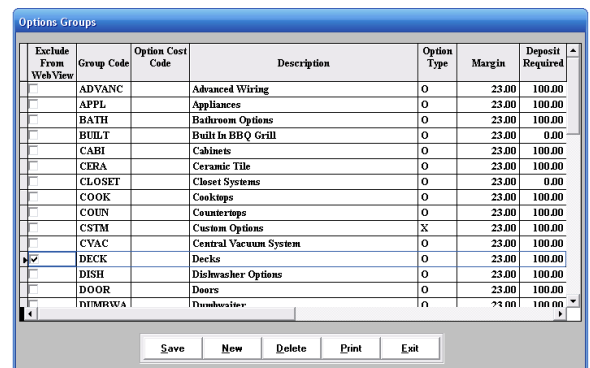
To activate a phase for Options Ordering, or to create PDF Catalogues, please go to **Setup: Inventory: Phases**. Then select the applicable phase and use the **Web Link** button on the bottom left to activate it by checking off *Activate Phase for Buyer Options Ordering*.



## Filtering Options Groups

In some cases there might be certain types of options that you do not want viewable online via Webview. These might include structural options or other builder related categories. In IBSWIN you can filter the options uploaded to the web by option group.

To do this, go to **Setup: Options: Options Groups**. In this screen simply put a check in the *Exclude from Webview* column for each options group that you do not want uploaded to Webview.

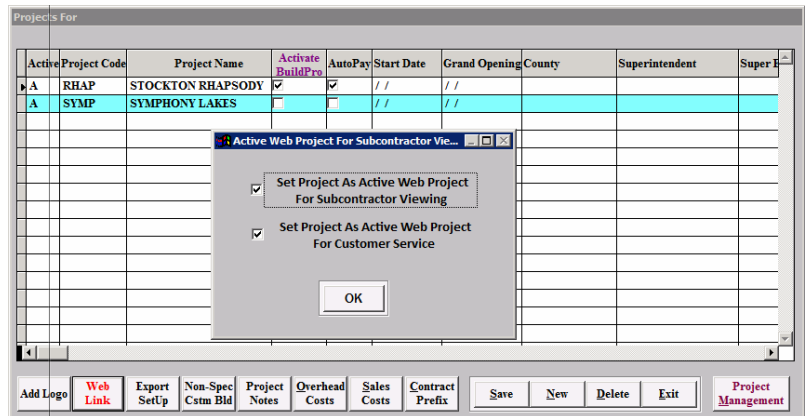


**Please Note:** This is global. There is no functionality to filter options individually or by project or phase.

## Activating Projects for Customer Service

Before any homeowner can submit any service request, they must be past their *Close of Escrow* date, and the project or community must be WebView active for Customer Service.

To activate a project, please go to **Setup: Inventory: Projects**. When in the project screen, select the project and use the **Web Link** button on the bottom left. Then select the *Set Project Active for Customer Service* check box.

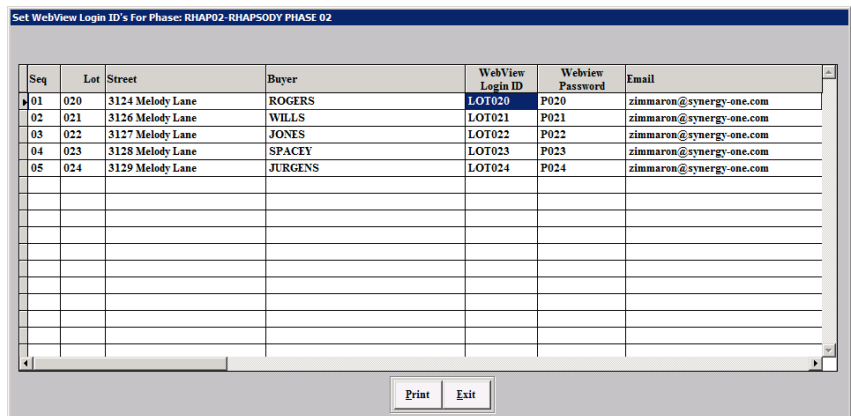


**Note:** For customer service it does not matter if the project is Active or Inactive in IBSWIN. This is the very first column in the screen.

## Assigning User ID's and Passwords for your Buyers/Homeowners

To give a buyer or homeowner access to WebView you must first assign them a unique user ID and password.

To do this, go to **WebView: Buyer WebView Login ID's**, select the appropriate phase, and the following screen will open where you can easily enter the desired login ID and password for each user.



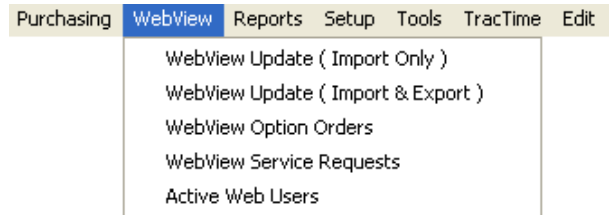
To print a list of active buyers with their user ID and password use the **Print** button. Buyer/homeowner information can also be viewed from within WebView (see page 21).

## Other setup related items

The remainder of the setup for SubView will be done directly in the Admin portion of Webview (page 21). This can only be done after you have synchronized IBSWIN with Webview (page 13).

## PART 2 – Synchronizing IBSWIN & Webview

After completing the initial setup of Webview in IBSWIN, or after making changes in IBSWIN that would affect Webview, you will need to synchronize Webview with IBSWIN. If you do not do this, then none of the changes or updates made in IBSWIN will appear in Webview.



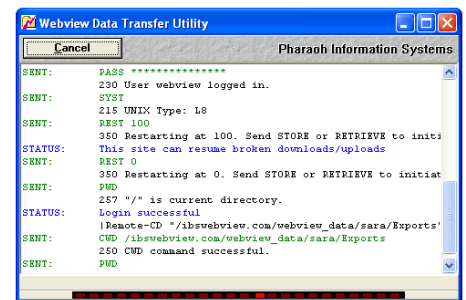
All communication between IBSWIN and Webview is controlled via the **Webview** menu in IBSWIN. Below is a description of each menu item and its purpose.

**Please Note:** When doing an import or export it is important that you let IBSWIN complete the process without interruptions. Do not click on any buttons until the transfer utility screen (pictured below) closes or you are prompted to do so. Importing/exporting goes through a series of processes that must be completed, so please be patient.

### Webview Update (Import Only)

This selection imports all information that has been submitted in Webview by homebuyers, prospects, or subcontractors. For example, any options orders, service requests, or bids that have been submitted online.

**Note:** This selection does not update Webview with any new or updated information in IBSWIN.



### Webview Update (Import & Export)

This selection does a complete synchronization (upload and download to and from Webview). Use this function to update Webview with the latest information available in IBSWIN. For example: user IDs and passwords for buyers and/or subcontractors; updates to the schedule; accessibility to new projects and/or phases; revisions to options pricing; etc. This function will also download anything that has been submitted via Webview to IBSWIN similar to the import only function.

### Webview Option Orders

This selection allows you to review option orders that have been downloaded from Webview. Here you can preview the selections made by the home buyer prior to submitting them to the main options system.

### Webview Service Requests

This selection allows you to review any service requests that have been submitted via Webview. This is where you can review any service requests and/or items prior to submitting them into the main customer service module of IBSWIN.

## Part 3 – Accessing Webview

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For IBSWIN to work with Webview, a special database is created by Pharaoh Information Services. This database, which resides on Pharaoh's web server, will store all the information that is uploaded from IBSWIN including any user submitted information. When you first purchase Webview you will be provided with a unique internet link. This link is your company's personalized Webview address which will allow you, and your users, to access your site (see page 14).

### Linking your website to Webview for public access

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Once you have your Webview link you will want to make it easy for your buyers, subcontractors, prospects, and/or superintendents to access it. We recommend that a button or link be added from your current company website to Webview so that your users won't need to remember the unique address and can find Webview easily.

To do this you will need to consult with your website designer. We will be happy to assist you with this if necessary. Once this is done, you can refer your Webview users directly to your company website to access Webview and its many features.

### Webview Login

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Using the link that was provided by Pharaoh (see page 7) you can login to Webview and start configuring it for your purposes. This can only be done however, after you have gone through the initial IBSWIN setup screens and synchronized your database. You will need to use the Admin login ID and password that assigned in IBSWIN (see page 8).

Initially, the Webview login page will have the Pharaoh and Webview logo however customize your website with your company or project logos, headers, and color schemes. This is reviewed on page 15.





<b>InterestView</b>
Contact Forms
Prospects
E-Blast
<b>Buyer Module</b>
Options
Manage Catalogs
Buyers
Manage Documents
Surveys
E-Blast
<b>Subcontractor Module</b>
Manage Documents
Track Documents
Subcontractors
Document Notifier
Review Options Bids
E-Blast
<b>IBSWIN E-Blast</b>
Prospects
Buyers
Subcontractors
<b>Document Creator</b>
Manage Images
Manage PDFs
<b>General</b>
Custom Appearance
Custom Pages
Preferences
User Setup
<b>Development</b>
Site Notifications
Change Logs
<b>Account Logs</b>
IBSWIN Import Log
Recent Activity
Logout

## PART 4 - Webview Administration

### **IMPORTANT!**

*Before you can administer (or access) Webview please make sure that IBSWIN has been setup properly and synchronized with Webview (see page 13 for details).*

**Important Note:** This portion of the guide is intended as an overview of the features and functionality of Webview. In-depth instructions are available within each page of Webview using the [Documentation](#) link found on the top-right of each screen.

As you login to Webview you will notice the menu on the left side of the screen. The menu is divided into two distinct sections. The top half will have Webview module specific setup and the bottom half will have more general or administrative setup and configuration sections. We will be reviewing each of these sections below but not in the same order as on the screen.

## General Administration Sections

The following section will guide you the general configuration and customization of Webview and some of the non-module specific administrative functions.

### General Section


**Custom Appearance**

Filter  
Project: Select a Project... Filter

This is where you may personalize the appearance of your Webview system. Three elements of the site layout may be customized:

- A new logo can be uploaded for the top left of the Webview template. The image dimensions must be 235 x 70. All image formats are accepted.
- A new header graphic can be uploaded for the upper right of the Webview template. The image dimensions must be 545 x 45.
- A custom stylesheet can be input, to change all of the fonts and colors of the site. Note that by customizing the stylesheet you can change the image dimensions to any size you wish.

**Current Logo**




You do not currently have a custom logo set, so the default Pharaoh logo will be displayed on all Webview pages. Use the form below to customize the appearance of your Webview.

**Upload Logo**

Please select an image on your computer to upload. Image will be forced into the dimensions 235 x 70.

**Current Header**



<b>General</b>
Custom Appearance
Custom Pages
Preferences
User Setup

### *Custom Appearance*

Here you can customize the look and feel of Webview to seamlessly integrate it into your website. This can be done by project or globally depending on your desired result. This section allows you to change logos, headers, and to input style sheets that allow you to change almost any element on the screen including fonts, colors, and general layout.

For advanced customizing you will need some web programming knowledge. Please contact Pharaoh for assistance.



## Custom Pages

This section allows you to modify the default verbiage and content of most of the screens in Webview. This gives you control over how you communicate to your clients. Simply select the **modify** link to change the existing screen by typing or pasting in your own content.

**Please Note:** If you want to have images, or fancy formatting of fonts, then HTML knowledge is required. Please contact Pharaoh for assistance.

## Customize Webview Pages

This is where you can setup custom pages throughout the Webview application, to better fit the needs of your subcontractors and buyers. Select a page below to begin customizing.

Page	Setting	Actions
MAIN_LOGIN	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
CONTACT	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
HOMEPAGE_ADMIN	Custom	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
HOMEPAGE_BUYER	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
HOMEPAGE_SUBCONTRACTOR	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
PO_VERBIAGE	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
BUYER_SHOPPING_VERBIAGE	Custom	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>

## Preferences

This screen is critical to changing the behavior of Webview for each module either globally or by project. It allows you to activate and deactivate certain features, assign email addresses for notifications when users submit information, and customize the functionality according to your needs. Please refer to the screen documentation for detailed assistance.

## Webview Preferences

[Documentation](#)

Global  Set preferences globally or by project.

### Branding

Application Name:   
 IFrame Resize Script:

### Buyer Options

- ☐ Allow buyers to see options that are past cutoff.
  - ☒ Allow buyers to select options that are past cutoff.
  - ☐ Allow buyers to see zero dollar options.
  - ☐ Hide option prices from ALL buyers.
  - ☐ Disable buyers from submitting their options wish list.
  - ☐ Buyers must acknowledge they've read provided legal disclaimer.
- Project logo for buyers:    
 \* Image will be resized to be **180 pixels** wide.
- Send wish list submittal notifications to this e-mail:
- "Reply to" e-mail address:
- ☒ Add buyer header to top of page when buyer prints Webview screens.

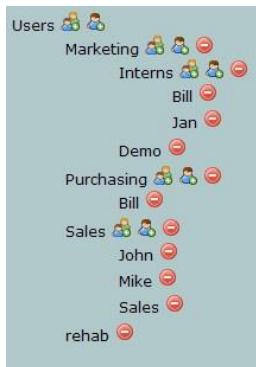
### Service Options

- ☐ Show discrepancies, if available.
  - ☐ Import rooms, if available.
- Extend IBSWIN buyer warranty by  years.
- Send service request submittal notifications to this e-mail:
- "Reply to" e-mail address:

### Subcontractor Options

- Send plan bid submittal notifications to this e-mail:
- Default filter when uploading sub documents:
- ☐ Disable schedule browse ability from ALL sub logins.
  - ☐ Disable plan bidding ability from ALL sub logins.
  - ☐ Disable document browsing ability from ALL sub logins.
  - ☐ Disable option bidding from ALL sub logins.

## User Setup



This provides a way to setup and define admin user privileges for the different selections and modules in the "admin" section of Webview. Please refer to the online documentation for specific instructions on how to setup different user profiles.

## User Setup

[Documentation](#)  
[Permission Setup](#)  
[Add User](#)

Login	Password	Activity	Op
Bill	Bill	-	<a href="#">edit</a> <a href="#">delete</a>
Demo	d3m0	-	<a href="#">edit</a> <a href="#">delete</a>
Jan	Sales	-	<a href="#">edit</a> <a href="#">delete</a>
John	John	-	<a href="#">edit</a> <a href="#">delete</a>
Mike	Mike	-	<a href="#">edit</a> <a href="#">delete</a>
web	w3b	-	<a href="#">edit</a> <a href="#">delete</a>

## Development Section

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### ***Site Notifications***

This screen provides you the latest news and any important notifications that might affect you as far as Webview is concerned. It is also how the Pharaoh Development Team can keep you informed of any downtime, bugs, and when any new developments, future upgrades, and/or training classes are scheduled. It is recommended that you visit here frequently.

### ***Change Logs***

This is an archived programming log that includes a dated list of all fixes, new features, and updates that have been done to Webview. It is important that you visit here frequently to understand what changes and new features have added that may affect you.

## Account Logs

---

### ***IBSWIN Import Log***

Here you can view the import log which provides important information about synchronization between IBSWIN and Webview. This is useful tool to troubleshoot a synchronization issue and to determine whether or not it was successful and where the problems are.

#### Account Logs

IBSWIN Import Log  
Recent Activity  
Logout

### ***Recent Activity***

This screen logs the activity of all Webview users, admin, buyers, and subcontractors. It will show you what page each user has looked at and the last time they logged in. This a great tool to help you track user activity. If you want to review detailed information of each user simply click on their user name.

#### User Activity

#	User	Type	Records	Last Activity
1	<a href="#">84631</a>	SUBC	13	Nov. 8th, 2006
2	<a href="#">LOT6</a>	BUYER	11	Nov. 8th, 2006
3	<a href="#">LOT2</a>	BUYER	17	Nov. 8th, 2006
4	<a href="#">ADMIN</a>	ADMIN	96	Nov. 11th, 2006

### ***Logout***

Logs you out of Webview properly.

## Document Creator Section

### Manage Images

This is a general area where you can upload images to be used in various sections of Webview. For instance, project logos for branding screens and/or for options product catalogues. You can even create categories to file the images for easier use.

### Manage PDF's






Manage PDF's is similar to Manage Images except in this case it used for filing PDF documents. As an example you could upload your Customer Service/Warranty/Maintenance Guides for your buyers to access and download from their account screens.

[Upload Image](#)  
[Create Category](#)  
[Delete Category](#)  
[Documentation](#)

**Manage Images**

**Filter Images**

Project:  Image Category:

Image	Name	Project	Category	Thumb	Op
1	<a href="#">Logo</a>	-	-		<a href="#">edit</a> <a href="#">delete</a>
2	<a href="#">LegalFooter</a>	-	Footer		<a href="#">edit</a> <a href="#">delete</a>
3	<a href="#">Globe</a>	-	Header		<a href="#">edit</a> <a href="#">delete</a>
4	<a href="#">HdrPonderosa</a>	-	Header		<a href="#">edit</a> <a href="#">delete</a>
5	<a href="#">WorldLogo</a>	-	Header		<a href="#">edit</a> <a href="#">delete</a>

## InterestView Specific Sections

[Documentation](#)  
[Rpt: Prospect Listing](#)  
[Rpt: Demographic Analysis](#)

**Contact Forms**

**New Contact Form**

Project:

Project	Prospects	Setup
<a href="#">GLOBAL</a>	<a href="#">IBSWIN Confirmed</a> <a href="#">Not Confirmed</a>	<a href="#">Vital</a> <a href="#">Demographic</a> <a href="#">Form Action</a> <a href="#">Confirm URL</a>
<a href="#">STOCKTON, RHAPSODY</a>	<a href="#">IBSWIN Confirmed</a> <a href="#">Not Confirmed</a>	<a href="#">Vital</a> <a href="#">Demographic</a> <a href="#">Form Action</a> <a href="#">Confirm URL</a>

### InterestView

[Contact Forms](#)  
[Prospects](#)  
[E-Blast](#)

### Contact Forms

This screen allows you to create contact forms that would be used for capturing information from your prospect. Contact forms can be defined globally or by project. Please refer to the online documentation for detailed instructions on how to use this feature.

### Prospects

This screen provides you with a list of prospects that contacted you via Webview. You can view the status of each prospect, export them directly to your IBSWIN Sales Manager Plus system for further follow up, manage their account details, and track demographic information by running analysis reports.

### E-blast

The section provides an automated method of sending email follow up to one or more prospect/s. It allows you to filter prospects by projects, demographic questions, or by name.

## SubView Specific Sections

### Manage Documents

This section allows you to upload any type of document that you would like to make available for your subcontractors to access and view. The types of documents you choose to upload could include floor plan specifications, layout diagrams, scopes of work, AutoCad files, etc. Documents can be uploaded by project, for selected trades, onsite or offsite, or for one or more subcontractors.

All Projects

#### Manage Documents

Project	Documents	POs	Options
<a href="#">STOCKTON, RHAPSODY</a>	27	5	<a href="#">Upload</a>

[Set PO Logo](#)  
[Set PO Signature](#)

Initially you will see a list of all the projects available in Webview. Next to each project you will see how many documents already exist.

### Adding New Documents

To add a new document, select the upload link and the screen pictured to the right will appear. You can choose to load a document globally (for all subs in that project), for a specific trade, or by specific subs. Choose the appropriate filters for your document and then use the **Browse** button to find it on your computer, enter a description, and use the **Upload New Document** button to upload it into the list of available documents.

#### Upload Document

[Set PO Logo](#)  
[Set PO Signature](#)

☒ **Upload globally:** [All Trades](#)

☐ **Upload for trades:** Hold Ctrl to select multiple trades.  
 ADDRESS TILES  
 ADDRESS TILES  
 AMENITIES  
 APPLIANCES  
 APPLIANCES

☐ **Upload for subcontractors:** Hold Ctrl to select multiple subs.  
 AAA Insulation  
 Anozira Door Systems  
 Arizona Wholesale Supply, Co.  
 Artistic Iron Designs, Inc  
 Aspen Block

Select a file to upload. **Note:** Files may not exceed 8MB.

Please provide a short description for this file:

☒ Send applicable subs an email notification.

#### Existing Documents

[Set PO Logo](#)  
[Set PO Signature](#)

Global	Description	Modify
<a href="#">BH014START.pdf</a> All trades	START - BH Lot 014	<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH067CHANGE1.pdf</a> All trades	Revert to Spec	<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH068CHANGE1.pdf</a> All trades	Revert to Spec	<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH067CHANGE2.pdf</a> All trades	Added electrical options	<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH014CHANGE1.pdf</a> All trades		<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH015CHANGE1.pdf</a> All trades		<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH015START.pdf</a> All trades		<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH016CHANGE1.pdf</a> All trades		<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH016SALES-OFFICE-MINI.pdf</a> All trades	Sales office mini plan	<a href="#">edit</a> <a href="#">delete</a>
<a href="#">BH016START.pdf</a> All trades		<a href="#">edit</a> <a href="#">delete</a>

### Viewing Existing Documents

To view existing documents select the applicable project and use the drop-down to select the type of document you wish to view, e.g. entire project, trade specific, sub specific, or even purchase orders that have been uploaded from IBSWIN.

By making the appropriate selection, a list will appear alphabetically by file name (which can be sorted by the column headers). From this screen you can select and view, delete, or replace any document.

## Track Documents

The purpose of this section is to see what subs are viewing what documents and when. In the document tracking area you'll see the date and time, user, document name and the project and phase name for all the documents that have been viewed. If you click on the users name it will show you all of the documents that that user has viewed. Alternatively, you can choose the subcontractor from the pull down menu at the top of the page. If you click on the document name it will show you the document. You can sort the documents by any of the column headings by simply clicking on the desired column.

User Document Activity			
All Users <span>▼</span>			
Viewed	User	Document	Project / Job
09-27-2006 2:31:50 pm	<a href="#">Artistic Granite &amp; Marble</a>	<a href="#">CDlogo.jpg</a>	STOCKTON, RHAPSODY
09-21-2006 2:43:29 pm	<a href="#">Whirlpool Corp, Inc.</a>	<a href="#">PO: 5132</a>	RHAPSODY PHASE 01
09-21-2006 2:39:30 pm	<a href="#">admin</a>	<a href="#">PO: 5132</a>	RHAPSODY PHASE 01
09-07-2006 1:29:37 pm	<a href="#">admin</a>	<a href="#">PO: 5128</a>	RHAPSODY PHASE 01
09-06-2006 9:21:20 am	<a href="#">Whirlpool Corp, Inc.</a>	<a href="#">PO: 5132</a>	RHAPSODY PHASE 01
08-31-2006 2:56:22 pm	<a href="#">admin</a>	<a href="#">PO: 5128</a>	RHAPSODY PHASE 01
08-31-2006 2:50:19 pm	<a href="#">A-1 Door &amp; Building Solutions</a>	<a href="#">2004plan.doc</a>	STOCKTON, RHAPSODY
08-31-2006 2:33:10 pm	<a href="#">admin</a>	<a href="#">PO: 5132</a>	RHAPSODY PHASE 01
08-31-2006 2:28:26 pm	<a href="#">admin</a>	<a href="#">PO: 5129</a>	RHAPSODY PHASE 01
08-31-2006 2:27:31 pm	<a href="#">admin</a>	<a href="#">PO: 5128</a>	RHAPSODY PHASE 01
08-31-2006 2:26:18 pm	<a href="#">admin</a>	<a href="#">CONAGREE.DOC</a>	STOCKTON, RHAPSODY
08-31-2006 2:25:53 pm	<a href="#">admin</a>	<a href="#">CDlogo.jpg</a>	STOCKTON, RHAPSODY
08-31-2006 10:28:27 am	<a href="#">Whirlpool Corp, Inc.</a>	<a href="#">PO: 5132</a>	RHAPSODY PHASE 01

## Subcontractors

This selection allows you to review specific information on each subcontractor that has access to Webview. If you select on the link for the login ID, it will show you a screen with detailed information about that subcontractor, or you can select the password which will automatically log you into their Webview account for support and verification purposes.

### Webview Subcontractor Logins

44 Subcontractor Logins Existing.				
Login	Password	Last Active	SubType	Full Name
<a href="#">SUB1</a>	P	unknown	onsite	A-1 Door & Building Solutions
<a href="#">SUB2</a>	P	unknown	onsite	Arcade Insulation, Inc.
<a href="#">SUB3</a>	P	Sep 27 06 5:32pm	onsite	Artistic Granite & Marble
<a href="#">SUB4</a>	P	unknown	onsite	B.E.E. Pest Services, Inc.
<a href="#">SUB5</a>	P	unknown	onsite	B.I.C. Security
<a href="#">SUB9</a>	P	unknown	onsite	Barbara's Concrete, Inc.
<a href="#">SUB6</a>	P	unknown	onsite	BDL Painting Inc.
<a href="#">SUB11</a>	P	unknown	onsite	Beutler Corp.
<a href="#">SUB7</a>	P	unknown	onsite	BMC West, Inc
<a href="#">SUB8</a>	P	unknown	onsite	BSW

## Document Notifier

This screen displays the status of any email notifications that have been sent to your subs notifying them of document or PO updates and changes.

Clicking on the **detail** link for any email groups will provide you with a list of which subs have received notices and what the email contained. Also, the send now link appears. If you click on it, the system will send any cued email notifications immediately.

### Sub Document Auto-Notification

[Email Types](#)

There are 15 emails waiting to be sent ([Send now](#)).

ID	Started	Finished	Summary	Op
44	10-25-2006 06:30:01 PM	10-25-2006 06:30:16 PM	Ran with 100.00% success. Sent 44 emails.	<a href="#">detail</a>
43	10-24-2006 06:30:00 PM	10-24-2006 06:30:02 PM	Ran with 100.00% success. Sent 6 emails.	<a href="#">detail</a>
42	10-24-2006 09:49:00 AM	10-24-2006 09:49:00 AM	Ran with 100.00% success. Sent 1 emails.	<a href="#">detail</a>
41	10-24-2006 09:19:00 AM	10-24-2006 09:19:00 AM	Ran with 100.00% success. Sent 1 emails.	<a href="#">detail</a>
40	10-24-2006 09:11:00 AM	10-24-2006 09:11:01 AM	Ran with 100.00% success. Sent 1 emails.	<a href="#">detail</a>
39	10-23-2006 06:30:00 PM	10-23-2006 06:30:06 PM	Ran with 100.00% success. Sent 14 emails.	<a href="#">detail</a>
38	10-19-2006 06:30:00 PM	10-19-2006 06:30:03 PM	Ran with 100.00% success. Sent 8 emails.	<a href="#">detail</a>
37	10-18-2006 06:30:00 PM	10-18-2006 06:30:30 PM	Ran with 100.00% success. Sent 56 emails.	<a href="#">detail</a>
36	10-17-2006 06:30:01 PM	10-17-2006 06:30:02 PM	Ran with 100.00% success. Sent 4 emails.	<a href="#">detail</a>



## Review Options Bids

If your subcontractors are submitting bids for options costs then this section allows you review and compare those bids, and also award them once you have selected the subcontractor you wish to go to contract with.

These costs can then be downloaded to IBSWIN where the cost of your options can updated automatically. In depth documentation is available in the screen itself.

[Overview](#)  
[Export](#)  
[Documentation](#)

**Review Options Bids**

Project: STOCKTON, RHAPSODY  
Job: RHAPSODY BID MASTER

More >>>  
Trade: APPLIANCES  
Options: << < Summary > >>

Plans	GE Appliances		Whirlpool Corp, Inc.	%
1627	87,160.00	@	92,320.00	@
1843	87,160.00	@	92,320.00	@
1932	87,160.00	@	92,320.00	@
2154	87,160.00	@	92,320.00	@
2336	87,160.00	@	92,320.00	@
2635	87,160.00	@	92,320.00	@
Total	522,960.00	@	553,920.00	@

[refresh](#)

% Sub is awarded the bid.  
# No bid entered.  
@ A zero dollar bid.  
\* A combination of no bid and a zero dollar bid.

## E-Blast

This allows you to send e-mail to one or multiple Subcontractors. You can select the subs by various filters including: all, onsite, offsite, by one or more trades, or by name.

The **Reply To:** field is for entering a return address for your email. Simply enter subject line and email message (with HTML for formatting), and click on the “send” button at the bottom of the page to “blast” your e-mail to all the selected recipients.

[Documentation](#)

**Send E-Blast**

**Note:** This E-Blast page will target only those subcontractors that have been assigned Webview accounts.

**Filter**  
All Projects

**Preview**  
Preview the e-blast by sending to the e-mail address below:

**Body**  
Reply To:   
Subject:   
Include the string <html> to send an HTML e-mail.

## BuyerView Specific Sections

### Options (Add Photos to Options)

This is where you can add photos to your Webview options product catalog. Initially, you will see a list of all your options. You can filter this list by selecting a project or options groups via the drop-downs to make it easier for you to administer this screen. The options are sorted by option number and next to each option you will see any photo's that may already exist for each option listed.

Buyer Module
<a href="#">Options</a>
<a href="#">Manage Catalogs</a>
<a href="#">Buyers</a>
<a href="#">Manage Documents</a>
<a href="#">Surveys</a>
<a href="#">E-Blast</a>

To add a photo, use the **Upload Image** link to the right of the option description. The section below will open which will allow you to **Browse** and select an image in .jpg format from your computer.

You can also enter a description for each photo which will display at the bottom of it. The **Upload** button will upload and save the image.

**Note:** Project level photos will always override global images, if however project level photos do not exist, Webview will default to the global image. The criteria used to assign images to an option is the option number. It is therefore important that if global images are being used that the option number matches the same option throughout all your projects, otherwise you will need to upload the different product images at the project level. A great resource for product images is [www.ebuild.com](http://www.ebuild.com).

### Manage Catalogs

Manage Catalogues allows you to manage and create your Options Catalogs. To print an existing catalog, simply click on the catalog name. This will open up the PDF file that was created for that specific catalog. To create a new catalog select **Create New Catalog** on the top right of the screen. For more information and detail instructions use the online documentation provided in the screen.

#### Manage Option Catalogs

[Create New Catalog](#)

ID	Name	Project	Op
1	<a href="#">OptionsCat</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
2	<a href="#">Testing01</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
3	<a href="#">Testing02</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
4	<a href="#">Testing04</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
5	<a href="#">Testing03</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
6	<a href="#">Testing05</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
7	<a href="#">PondoDemo</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
8	<a href="#">sdfgsdfg</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
9	<a href="#">OneMore</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
10	<a href="#">test</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
11	<a href="#">cti_test</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>
12	<a href="#">cti_test2</a>	STOCKTON, RHAPSODY	<a href="#">delete</a>

### Create Option Catalog

PDF Name:  ?

Project:  ?

Show Prices: ☐ ?

Print w/o Pic: ☐ ?

Coversheet:  ?

Header:  ?

Footer:  ?

Page Size:  ?

Margins - Top:  Bottom:

Left:  Right:

For help on this page, put your cursor over the square with the “?” and specific help message for that function will be displayed. Make the appropriate selections to create the desired catalog. The Coversheet, Header, and Footer images are created in the “Manage Images” selection covered later in this guide.

## Buyers

This screen shows you a list of all of the buyer logins that are currently used to logon to Webview. It also provides you their password information. If you select the link under the Login column the system will show you detailed information about that buyer.

### Buyer Report

All Projects

12 total buyer(s); 12 displayed. Show  buyers per page.

Login	Password	Lot	Project	Phase
<a href="#">LOT1</a>	P	001	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT10</a>	P	010	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT11</a>	P	011	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT12</a>	P	012	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT2</a>	P	002	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT3</a>	P	003	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT4</a>	P	004	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT5</a>	P	005	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT6</a>	P	006	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT7</a>	P	007	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT8</a>	P	008	STOCKTON, RHAPSODY	RHAPSODY PHASE 01
<a href="#">LOT9</a>	P	009	STOCKTON, RHAPSODY	RHAPSODY PHASE 01

## Surveys

### Surveys

[Create Survey](#)

Project	Name	Active	Responses	Branding	Setup
GLOBAL	30 Day Survaey	Y	<a href="#">view</a> <a href="#">RPT: Analysis</a>	<a href="#">form</a> <a href="#">invitation</a>	<a href="#">questions</a> <a href="#">schedule</a> <a href="#">deactivate</a> <a href="#">edit</a> <a href="#">notification</a>
STOCKTON, RHAPSODY	6 month followup	N	<a href="#">view</a> <a href="#">RPT: Analysis</a>	<a href="#">form</a> <a href="#">invitation</a>	<a href="#">questions</a> <a href="#">schedule</a> <a href="#">activate</a> <a href="#">edit</a> <a href="#">notification</a>

In order to create a survey:

1. Click on [Create Survey](#)
2. Under *Setup*, click on *questions*
3. Under *Setup*, click on *schedule*
4. Under *Setup*, click on *notification*
5. Under *Setup*, click on *activate*
6. [optional] Under *Branding*, click on *form* to customize the appearance of your survey. You must know XHTML and CSS.
7. [optional] Under *Branding*, click on *invitation* to customize the invitation e-mail sent to your users.

In order to view survey responses and reports, click on any of the links under the *Responses* column.

This function provides a way of creating custom buyer surveys either globally or project specific. It provides an automated Email delivery system that provides a link to the homebuyers to fill out the survey. It also can provide a reminder notification if the homebuyer has not responded to the survey. Finally, it provides various analysis reports for management.

Refer to the simple instructions on this page to create your surveys.



## E-Blast

This selection allows you to send the same email to one or multiple homebuyers. You can select the homebuyers for all projects or specific projects. Any homebuyer with an Email address in the selected project will appear. (Please note that homebuyer Email addresses must be setup in your IBSWIN system)

The ***Reply To:*** field is to provide a return address for your homebuyers.

Simply enter subject line and Email message as you would in any Email product and click on the “send” button at the bottom of the page to “blast” your Email message to all the selected participants.

## Send E-Blast

[Documentation](#)

**Note:** This E-Blast page will target only those home-owners and home-buyers that have Webview accounts.

The screenshot shows a web form titled "Send E-Blast". It has a light blue header bar. Below the header, there's a "Filter" section with a dropdown menu set to "All Projects" and a "Filter" button. Below that is a "Body" section with "Reply To:" and "Subject:" labels, each followed by a text input field. Below these is a large text area for the email body, with a small instruction "Include the string <html> to send an HTML e-mail." above it. At the bottom right of the form is a "Send" button.

## PART 5 – Using Webview

This section of the user guide goes over how the subcontractors, homebuyers, and prospects will use Webview to place options orders, view documents, submit bids, and so forth. The best way to provide access for these external users is to create a link from your Website. Pharaoh will be happy to assist your Web designer in creating this link.

### Using SubView

SubView is a Web based product provided by your homebuilder partner to communicate various documents and information using the power of the Internet. This can include Plans, Agreements, Sequence Sheets, payment schedules and purchase orders. If there are documents for your company on the Web, you will receive an automated Email message notifying you. Using Webview you will have the ability to submit bids and review construction schedules, if your homebuilder partner is using these Webview capabilities.

Subcontractor
<a href="#">Review Documents</a>
<a href="#">Plan Bidding</a>
<a href="#">Options Bidding</a>
<a href="#">Construction Schedule</a>
<a href="#">Email Addresses</a>
<a href="#">Logout</a>

Step #1 in order to access SubView is to obtain a unique user ID and password from your home building partner. Each of the available menu selections are reviewed below.

### Review Documents

From this area, the subcontractor will be able to select a project review any documents that have been uploaded for them to view.

When the list appears they can filter it by general documents or purchase orders if these are being uploaded from IBSWIN. Which ever choice they will be able to select the document by its name and view or download it.

All Projects > STOCKTON, RHAPSODY

#### Project Documents

General Documents ▾

Name	Description
<a href="#">CDLogo.jpg</a>	
<a href="#">2004plan.doc</a>	Project overall plans
<a href="#">seqsheet.pdf</a>	Sequence Sheet
<a href="#">ReInstalling Microsoft Photo Editor.doc</a>	ReInstalling Microsoft Photo Editor
<a href="#">AGREE01.DOC</a>	General Agreement
<a href="#">Winter.jpg</a>	Floor Plan
<a href="#">csweeksumm.pdf</a>	Report
<a href="#">house1.jpg</a>	House plans
<a href="#">01pppyscd.pdf</a>	Pay Schedule Sample
<a href="#">jbs_021.jpg</a>	New Doc
<a href="#">26.jpg</a>	pondo demo :)
<a href="#">05_011934.gif</a>	hgfkjgfkjf jhgf jfjfig jk j

#### Base Plan Bidding

[Bid Histor](#)

Please bid on each plan as it pertains to your selected trade and click submit.

Project: STOCKTON, RHAPSODY  
Trade: DOOR/TRIM

Plan	Sq. Ft.	Bid		
1627A	1627	5467	↓	↑
1627B	1627	5467	↓	↑
1627C	1627	5467	↓	↑
1627D	1627	5467	↓	↑
1843A	1843	5467	↓	↑
1843B	1843	5467	↓	↑
1843C	1843	5467	↓	↑
1843D	1843	5467	↓	↑
1932A	1932	5467	↓	↑
1932B	1932	5467	↓	↑
1932C	1932	5467	↓	↑
1932D	1932	5467	↓	↑
2154A	2154	5467	↓	↑
2154B	2154	5467	↓	↑
2154C	2154	5467	↓	↑
2154D	2154	5467	↓	↑

### Plan Bidding

This section allows a subcontractor to submit bids for specific projects and trades that they have access to. Here they will also be able to review previously submitted bids. Any submitted bids will all be downloaded to IBSWIN and will provide an email notification to the purchasing department if setup correctly in Webview admin.

To enter a bid for each plane simply enter the amount in the appropriate field. The two buttons with arrows pointing down to the right of each bid are dupe buttons. The single arrow dupe the amount down to the next plan elevation and the double arrows dupe all the way down. The **Submit** button at the bottom will submit the bid. The **Bid History** link on the top right will allow the subcontractor to view any previous bids.

## Options Bidding

This section allows a subcontractor to be able to submit bids on options based on the trades that they have assigned to them in IBSWIN. Firstly, they will need to select the project, and then the option number to input the cost.

As the option is selected, the option description will appear and they can input the cost per plan and even dupe them if applicable using the down arrow buttons. **Save** will save the bid and they can conveniently move from option to option using the **< Prev** or **Next >** buttons. These bids will automatically appear in the Webview admin where you can compare and award them.

**Options Bidding**

---

Project: STOCKTON, RHAPSODY  
 Job: RHAPSODY BID MASTER  
 Options: << < Prev BATH001 Next > >> Save

**Bid Sheet**

**BATH001 Master Bathroom Door**  
 Please bid on the option as it pertains to each of your assigned trades:  
**DOOR/TRIM**

Plan	Estimated Cost	
1627	<input type="text"/>	<input type="button" value="↓"/> <input type="button" value="⇓"/>
1843	<input type="text" value="0"/>	<input type="button" value="↓"/> <input type="button" value="⇓"/>
1932	<input type="text" value="0"/>	<input type="button" value="↓"/> <input type="button" value="⇓"/>
2154	<input type="text" value="0"/>	<input type="button" value="↓"/> <input type="button" value="⇓"/>
2336	<input type="text" value="0"/>	<input type="button" value="↓"/>
2635	<input type="text" value="0"/>	

## Construction Schedule

Here a subcontractor can view their schedule for any phase of a project that they have access to.

First they will need to select the appropriate trade and phase and then they will be able select from one of the four options displayed to the right. Each selection filters the schedule to make it easier for them to view the information they need.

Review Construction Schedule - Search Criteria

Select one of the date options below to display the construction schedule.  
 You can also change your trade to review different schedules for each trade.

Project: RHAP  
 Plan: RHAP01  
 Trade: DORT

☒ Entire Schedule
 ☐ Today's Schedule  
☐ One Week Schedule from Today
 ☐ Specific Dates:

Start Date:  (mm/dd/yyyy)  
 End Date:  (mm/dd/yyyy)

## Email Addresses

This is where the subcontractor can input/update either their general email address, or their IBSWIN email address.

**Email Addresses**

---

Email Type	Address	HTML	Auto
IBSWIN	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
General	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

The IBSWIN email address is what will be used to receive Webview notifications including any new or updated documents and copies of bids submitted. The General email is for normal emails. HTML sends the email in HTML format when checked. When AUTO is checked it activates the automatic notifications.

## Using BuyerView (Options)

For a homebuyer to be able to access BuyerView for Options Ordering you must provide them with their user ID and password as assigned in IBSWIN (see page 12). When orders are submitted through Webview and email notification will be sent to the purchasing department and the order can be downloaded into IBSWIN for final review and approval.

<b>Options</b>
<a href="#">Browse Options</a>
<a href="#">Submitted Wish Lists</a>
<b>Account</b>
<a href="#">Online Documents</a>
<a href="#">Account Info</a>
<a href="#">Logout</a>

## Browse Options

This is the area where a homebuyer can pre-select any options that are available for their home. By choosing an **Option Category** a buyer can review the list of available options.

If the image of the option is displayed, a buyer can select it to get larger view. To order an option you can select the **Color** (if applicable), enter the quantity you want, add any notes or comments if necessary and select the **Add to Wish List** button. This will add the option to the cart which has a summary displayed on the top right of the screen.

If a shopping cart icon is displayed to the left of the option number of an option, than means that the option is already in the cart. Clicking on the icon will allow the buyer to review the contents of the cart. The cart can also be accessed by selecting the **View Cart** link below the cart summary on the top right.

If an option has already been added to the cart and it needs to be removed use the **Remove** button on the bottom left. To update the quantity, notes, or color, make necessary changes and selected the **Update** button.

Once a buyer has completed their selections and reviewed them, then the order can be submitted to the options department using the **Submit Wish List** button. Prior to doing so, it is possible for the buyer to update the email address where they wish to receive a summary of this order.

## Submitted Wish List

This selection allows a buyer to review previously submitted orders or selections.

Cart Items: 4  
 Cart Total: \$5,495.00  
[View Cart](#)

### Browse for Options

**Browse another category:**  
 Appliance Group ▼

[Learn more](#) about options shopping.

---

**APPL001 - Trash Compactor**  
Black or White





Image Description. New one


**Buyer Notes:**

Unit Price: \$1,000.00 Total Price: \$1,000.00

Quantity:  **Add to Wish List**

---

 **APPL002 - Appliance Package A**  
Black with White: Gas Range, Dishwasher, Microwave/Hood Combo



New Cool Range

**Buyer Notes:**

Unit Price: \$545.00 Total Price: \$545.00

**Remove** Color:  ▼ Quantity:  **Update**

## Approving Orders in IBSWIN

If an options order has been submitted by a buyer in Webview and (downloaded into IBSWIN) then it can be reviewed by going to the **Webview: Webview Option Orders** screen in IBSWIN. Here a designer or sales person can review the order in a screen similar to the Options Ordering screen and submit it to the Options module by using the **Submit** button. By doing so the order will be added to the main options ordering screen for that lot where PO's can be generated.

## Using ServiceView (Customer Service)

Once a buyer has closed escrow on their new home, and you have ServiceView, a home owner will be able to submit service requests for any problems that they might have with their new house. A submitted request will be emailed to the customer service department and can be downloaded to IBSWIN for final review and approval. For a homebuyer to be able to access ServiceView you must provide them with their user ID and password as assigned in IBSWIN (see page 12).

Customer Service  
New Service Request  
View Request History

Account  
Online Documents  
Account Info  
Logout

## New Service Request

The service request screen illustrated allows a home owner to enter requests listing as many problem items as necessary.

They do this by initially specifying the room then they can input a description for the problem. The **Add Items** buttons will add additional lines to input more items.

### Submit a Request for Service

Please specify a room and brief description for each item you would like serviced. You may add additional items by pressing either of the 'Add 5 Items' or 'Add Item' buttons. After adding an item, you may remove it by pressing the corresponding '-' button in the right margin.

Item	Room	Description
1	Kitchen	Broken Tiles on countertop

Add 5 Items   Add Item   ?

Please enter any additional comments or requests below:

Please contact us after 4pm on Tuesday or Thursday to setup appointment.

Submit Service Request

Before submitting the final service request the home owner can enter any special comments or communication to your Customer Service rep. Once complete the **Submit Service Request** button will submit the request. Prior to doing so the home owner can change the email where they want to receive the confirmation. All requests submitted through Webview are saved in a request log for future review.

## View Request History

This selection allows a home owner to review previously submitted service requests as well as the status of them.

## Approving Service Requests in IBSWIN

If a service request was submitted by a home owner in Webview (and downloaded into IBSWIN) then it can be reviewed by going to the **Webview: Webview Service Requests** screen in IBSWIN. Here a service rep can review the request and items in a screen similar to the Customer Service screen and submit it to the Customer Service module by using the **Submit** button. By doing so the service request will be added to the main customer service screen for that lot where it can be maintained and tracked like normal.

## Other General Buyer Menu Items

### Online Documents

This section is where buyer documents can be accessed and downloaded by the buyer or home owner. These could include warranty specifications and guidelines, color sheets, floor plans, and any other documents.

**Online Documents**

File	Type	Modified
<a href="#">911.bmp</a>	image/bmp	Fri. 10:14:34 AM Mar. 23rd, 2007
<a href="#">BEACH.jpg</a>	image/jpeg	Fri. 10:14:35 AM Mar. 23rd, 2007
<a href="#">Option Detail Listing.pdf</a>	application/pdf	Fri. 10:14:36 AM Mar. 23rd, 2007
<a href="#">2004marktqbdx.xls</a> Plan	application/msword	Tue. 12:17:20 PM Mar. 27th, 2007
<a href="#">2004marktqbdx.xls</a> Budget	application/msword	Thu. 11:59:35 AM Apr. 12th, 2007
<a href="#">LotMap.pdf</a>	application/pdf	Tue. 10:14:22 AM Jul. 17th, 2007
<a href="#">LotMap.pdf</a> Plan Take off	application/pdf	Thu. 08:43:27 AM Aug. 16th, 2007

### Account Info

Displays the contact information for the buyer or homeowner as it is in IBSWIN.

## Using InterestView

InterestView has no user interface other than a link that is linked to your website. When accessed, it will display to prospect form that you have created in the admin section. This would be provided to your Web site programming company to provide

For more information go to the appropriate screen in the Webview information and refer to the detailed online documentation included in this Webview module.

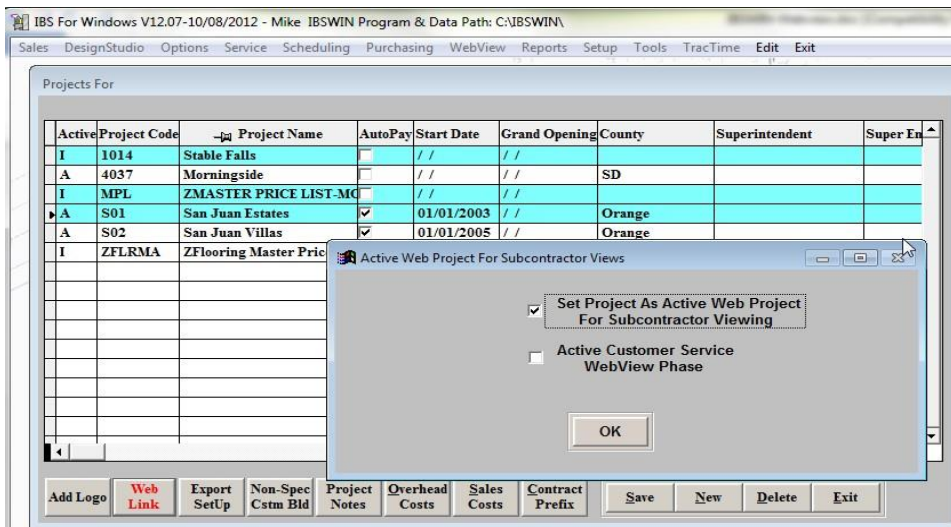
## Appendix A – Uploading Purchase Orders

The process of uploading purchase orders from your IBSWIN system to Webview for your subcontractors to review and print out is an extremely important and yet simple process once it has been setup correctly. This document includes the simple steps to accomplish this including providing diagrams to accompany these purchase orders.

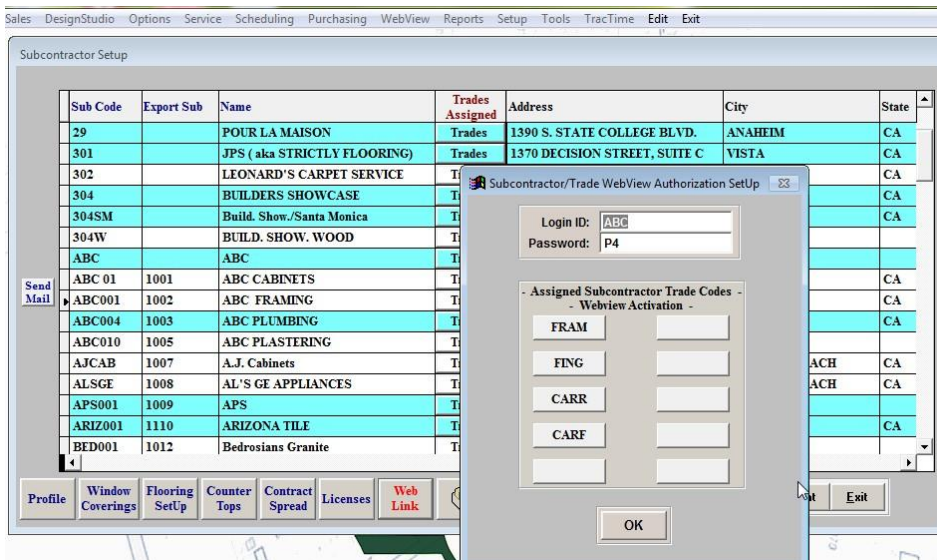
### Required Setup – one time

In IBSWIN all that is required to activate the purchase order upload are two steps:

1. Go to Setup – Inventory – Projects – Web Link to activate the project



2. Set up a Login ID and Password for each subcontractor





In Webview you will need to go into the General section – Preferences – Subcontractor Options :

### Subcontractor Options

Send bid submittal notifications to this e-mail:

Default filter when uploading sub documents:

☐ Disable schedule browse ability from ALL sub logins.

☐ Disable plan bidding ability from ALL sub logins.

☐ Disable document browsing ability from ALL sub logins.

☐ Disable option bidding from ALL sub logins.

☒ Send notification emails when uploading subcontractor documents.

☒ Send notification emails when editing subcontractor documents.

☒ Send notification emails when importing purchase orders from IBSWIN.

☒ Send notification emails for purchase order revisions.

Purchase orders older than  YYYY-MM-DD do not cause e-mail notifications.

☒ Turn on automated document notification process.

Subs receive document notifications at this email type:

Send e-mail notifications every  at

:   and again at

:  .

Current Server Time: Tue, Oct. 9th, 2012 10:34:37 AM

This is where you setup the documentation notification process that will send an automated Email to your subcontractors when purchase orders have been uploaded and are ready for their review.

## Uploading Purchase Orders / Attaching diagrams

Once the setup has been completed, the purchase order upload is fully automated. Here are the simple steps:

- 1) All that has to been done on the IBSWIN side is simply display the purchase order so that a purchase order number is assigned. Please review the PO for accuracy.
- 2) The next step on the IBSWIN side is to run the Webview Update (Import and Export). This process can be run manually at any time or setup as an automated program run as often daily as desired using the Microsoft Program Scheduler.
- 3) On the Webview side after the Webview Update has been completed (the IBSWIN Import Log will help you verify this), the purchase orders are available for immediate subcontractor viewing and printing. Based on your Preference setup, your subcontractors will be sent a simple Email notifying them of the new PO upload.
- 4) If you have diagrams that need to be sent at the same time to accompany the purchase orders, that is done in Webview using the Subcontractor Module – Manage Documents function.
  - o Start by selecting the appropriate project

- Select under Options – Upload for subcontractors and select the subcontractor. Using the “Browse” button select the diagram document(s). In the description reference the PO# so that your sub will be able to easily make the connection. Select the “Upload New Document” button to complete the process.

Upload Document

Set PO Logo  
Set PO Signature

☐ Upload globally: All Trades

☐ Upload for trades: Hold Ctrl to select multiple trades.  
ALARMS  
APPLIANCES  
Bike Trails  
CABINETS  
CARPET/VINYL

☒ Upload for subcontractors: Hold Ctrl to select multiple subs.  
A-1 Door & Building Solutions  
Arcade Insulation, Inc.  
Artistic Granite & Marble  
B.E.E. Pest Services, Inc.  
B.I.C. Security

Select a file to upload. **Note:** Files may not exceed 8MB.  
C:\Users\Mike\Documents\ Browse...

Please provide a short description for this file:  
PO#10292 - Electric Diagrams

☒ Send applicable subs an email notification.

- 5) Your subcontractors will now be able to view the uploaded purchase orders and diagrams via their Web portal – Review Documents – select the Project. The POs and associated diagrams can be easily reviewed and printed.

PHARAOH  
Integrated Builder Series

Home Contact Logout

Subcontractor

- Review Documents
- Change Orders
- Plan Bidding
- Options Bidding
- Scheduling
- Email Addresses
- Return to Admin
- Logout

All Projects

### Project Document Overview

Project	Documents	POs
<a href="#">B of A, Countrywide</a>	3	1
<a href="#">STOCKTON, RHAPSODY</a>	23	5

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# Webview Appearance Customization

The following section will guide you the customization of Webviews' appearance to help it look more like your existing website.

Once logged into your Webview admin account simply go to the General section and there you will find the main menus that will assist with that function.

General  
Custom Appearance  
Custom Pages  
Preferences  
User Setup

## Custom Appearance

Here you can customize the look and feel of Webview to seamlessly integrate it into your website. It is basically broken down into 3 main sections that are described below.

### Filter

This allows you to add customizations by project, or globally, depending on your desired result. Some of our clients have different logos, or even websites, for each project. This function allows you to do that.

### Current Logo

Allows you to upload your own logo and replaces the default pharaoh logo.

### Current Header

Changes the main header image located to the top right of the header.

### Current Stylesheet

Allows you to modify and change the styles of Webview to match your website more accurately. This allows you to change almost any element on the screen including fonts, colors, and general layout.

Below is a basic style guide for the main sections of Webview. For finer style elements, we recommend using Firebug which is a web browser add-on for Firefox and Chrome which allows you to hover over any web page and view its styles. This is an excellent free tool that can be used to find all the styles that need

**Custom Appearance**

---

Filter

Project:


---

This is where you may personalize the appearance of your Webview system. Three elements of the site layout may be customized:

- A new logo can be uploaded for the top left of the Webview template. The image dimensions must be **235 x 70**. All image formats are accepted.
- A new header graphic can be uploaded for the upper right of the Webview template. The image dimensions must be **545 x 45**.
- A custom stylesheet can be input, to change all of the fonts and colors of the site. Note that by customizing the stylesheet you can change the image dimensions to any size you wish.

---

**Current Logo**




You do not currently have a custom logo set, so the default Pharaoh logo will be displayed on all Webview pages. Use the form below to customize the appearance of your Webview.

**Upload Logo**

Please select an image on your computer to upload. Image will be forced into the dimensions **235 x 70**.

---

**Current Header**



to be changed. Then you can add the relevant classes and id's with your modifications to the stylesheet text box. Any changes should display immediately.

For more information, or assistance, please contact: [zimmeron@ibswin.com](mailto:zimmeron@ibswin.com)

## Basic Style Guide

`body { }` – Which includes the width, background-color, left & right borders, and default fonts

`#PageHeader { }` – Adjusts background-color, dimensions, and content styles in the main header including the menu styles for the links under the page banner

`#PageLogo { }` – Adjusts the default logo dimensions (far left of header)

`#PageBanner { }` – Adjusts the header image dimensions (top right of header)

`#PageContent { }` – Adjusts the content container and all its styles

`#ColNav { }` – Adjusts the main sidebar menu navigation and associated menu styles

`#PageFooter { }` – Adjusts the footer its styles elements

## Custom Pages

This section allows you to modify the default verbiage and content on most of the screens in Webview.

This gives you control over how you communicate to your clients. Simply select the **modify** link to change the existing screen by typing or pasting in your own content either using plain text or HTML.

### Customize Webview Pages

This is where you can setup custom pages throughout the Webview application, to better fit the needs of your subcontractors and buyers. Select a page below to begin customizing.

Page	Setting	Actions
MAIN_LOGIN	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
CONTACT	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
HOMEPAGE_ADMIN	Custom	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
HOMEPAGE_BUYER	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
HOMEPAGE_SUBCONTRACTOR	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
PO_VERBIAGE	Default	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>
BUYER_SHOPPING_VERBIAGE	Custom	<a href="#">view</a>   <a href="#">modify</a>   <a href="#">delete</a>

## Optimizing Images for WebView

When uploading images for use in WebView it is important that they are optimized for the web. Images that are not optimized can slow down the site considerably especially if your users are using mobile devices to view the system and even cause crashes when creating options catalogues that have a large number of images.

### *Optimal Image Criteria*

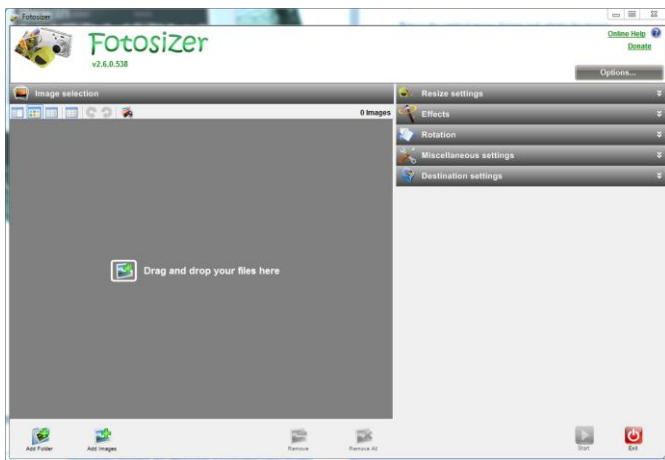
Here is the optimal image format and criteria for images:

**Format:** jpg or jpeg  
**Dimensions:** largest size 450px.  
**DPI:** 72 dpi  
**Compression or Quality:** 80%

The settings above will produce the smallest files size without any noticeable quality loss of the image when viewed in the system or when printed in any of the Options catalogues.

### *Software To Optimize Your Images Easily*

Without knowing anything about image editing you can easily optimize one or more images at a time instantly using a free software program called **Fotosizer**.



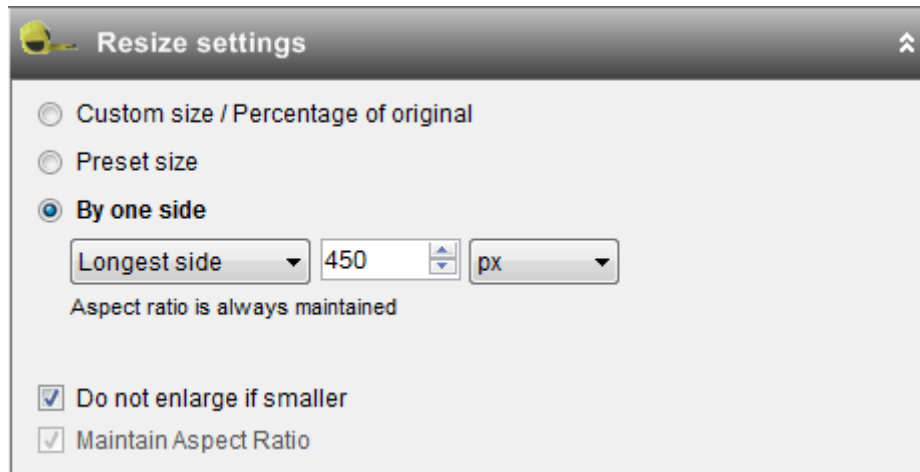
Fotosizer can be downloaded from the following link: <http://www.fotosizer.com/download.aspx> and installed onto your computer. Only the free version is required to get the desired results.

Once Fotosizer is installed, it needs to be configured to resize and optimize your images... please follow the steps outline on the following page...

## Configuring Fotoresizer

### Step 1 – Resize Settings

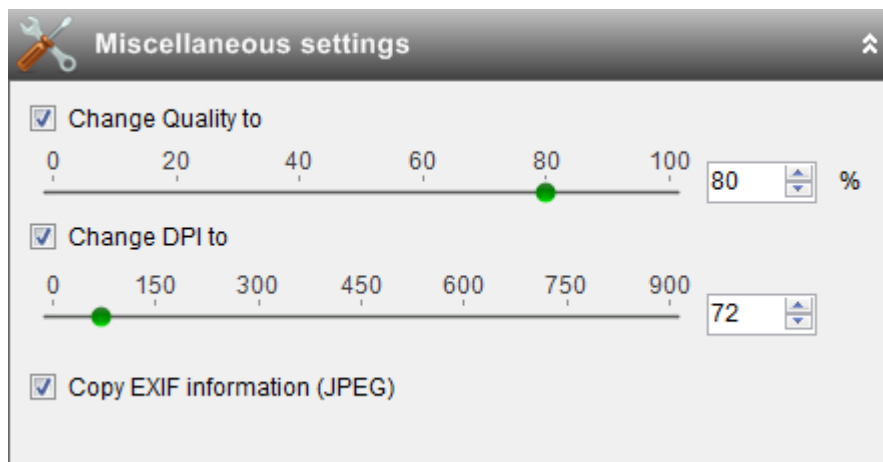
Set the resize setting as per picture below...



Step 2 –Effects or Rotation Settings can be ignored or left the same.

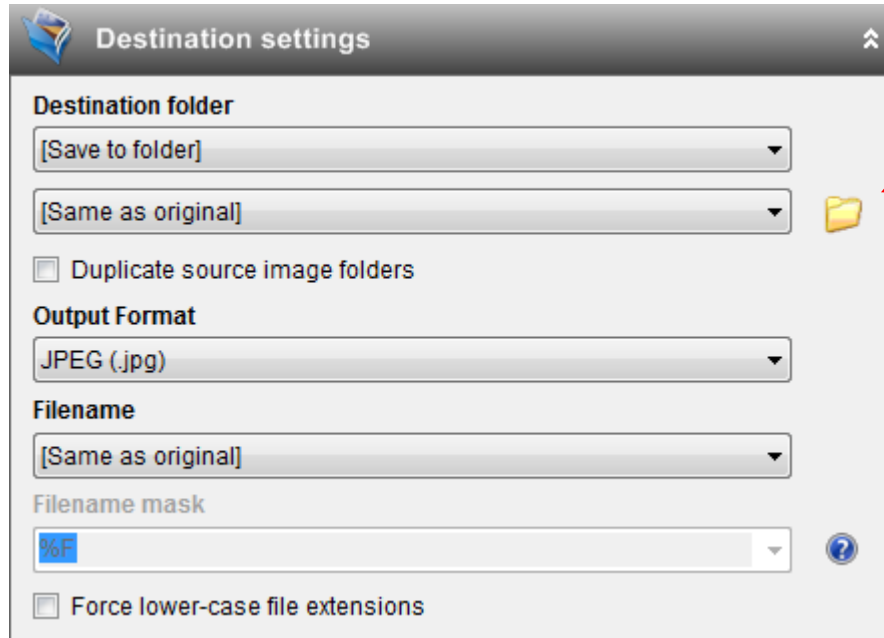
### Step 3 – Miscellaneous Settings

Set the miscellaneous settings as per the picture below...

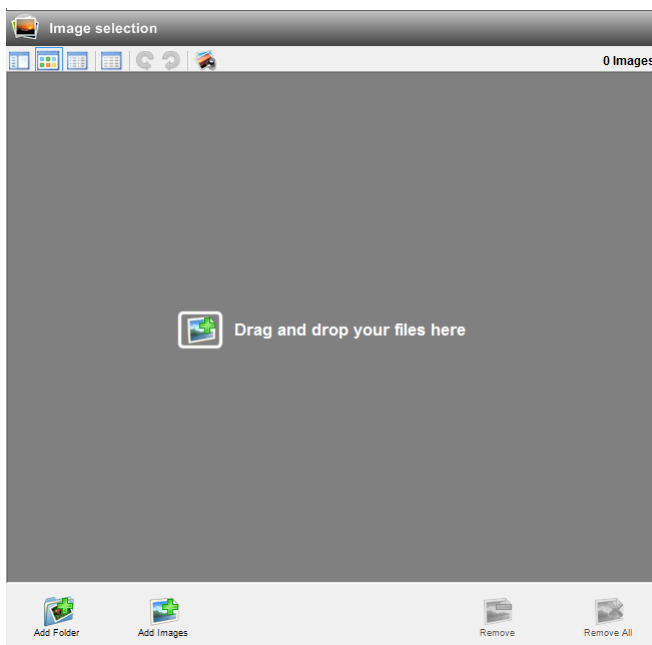


### Step 4 – Destination Settings

Set the destination settings as per the picture below. The only other change is that you will need to select your destination folder (see arrow) to allocation where you want the resized images to be saved.



## Using Fotoresizer



### Step 2

If all the settings are as per the steps above then resizing and optimizing your images couldn't be easier. The great thing is that **Fotoresizer** will save its settings so next time you open it you should not need to change anything other than your destination folder if you want to.

### Step 1

Drag or drop one or more images into the left-hand panel (or use the buttons on the bottom left to browse and add files or folders). There are no limits to how many images you can resize and optimize which can save hours of manually manipulating images.

Simply click on the start button on the bottom right and let Fotoresizer do its job. Once complete you can upload any of the images from you destination folder to WebView.

