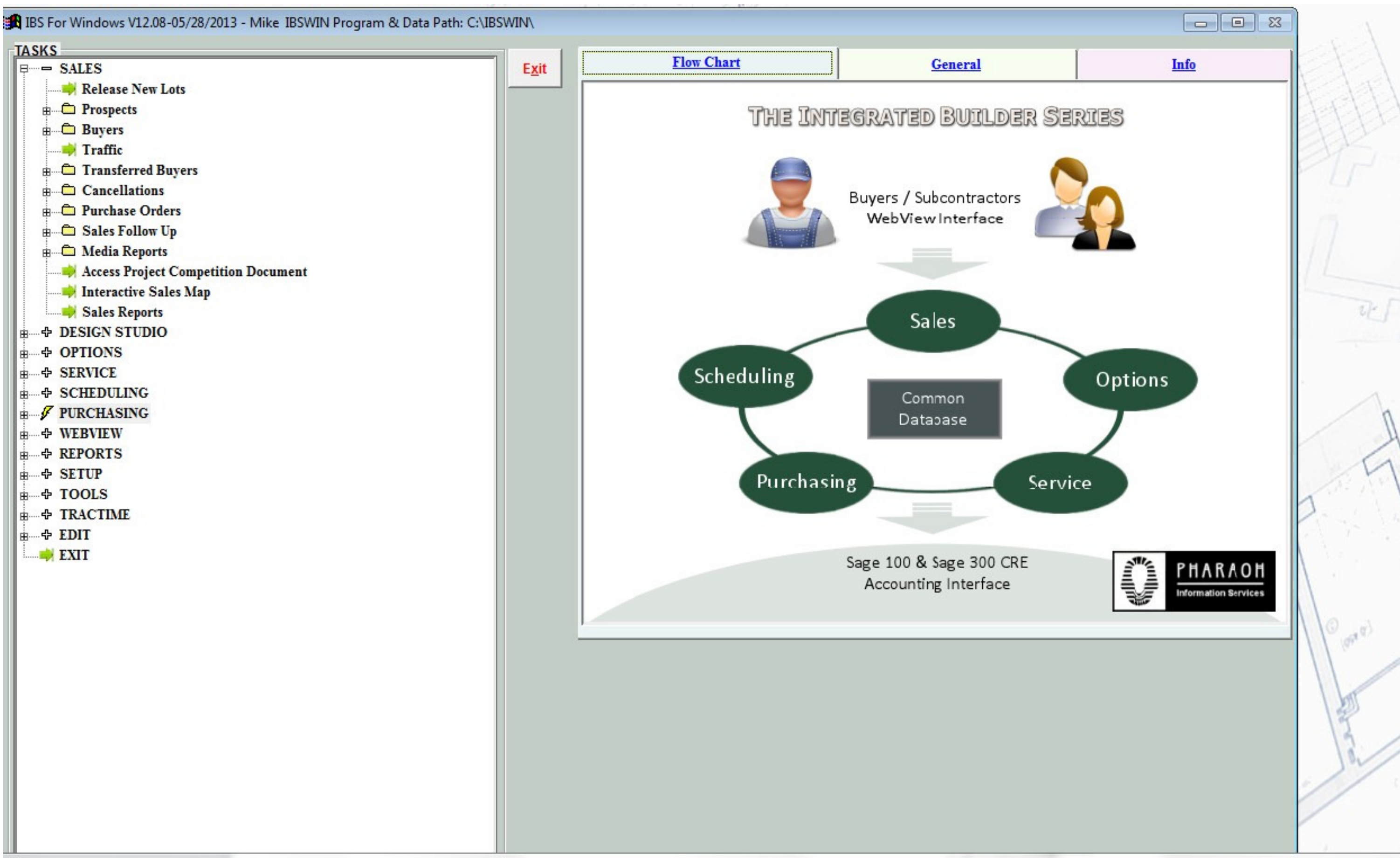
Options Plus

for *IBSWIN*

(Version 12.XX)

Expanded User Guide



Pharaoh Information Services, Inc.

Phone: (866) 813-0398

Fax: (949) 748-5142

www.IBSWIN.com

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

Departmental E-mail Contacts:

Sales: sales@ibswin.com

Customer Support: support@ibswin.com

General Information and Assistance: info@ibswin.com

Visit our website for free software updates, FAQ's, full customer and technical support, and the latest developments in our *IBSWIN* line of software.

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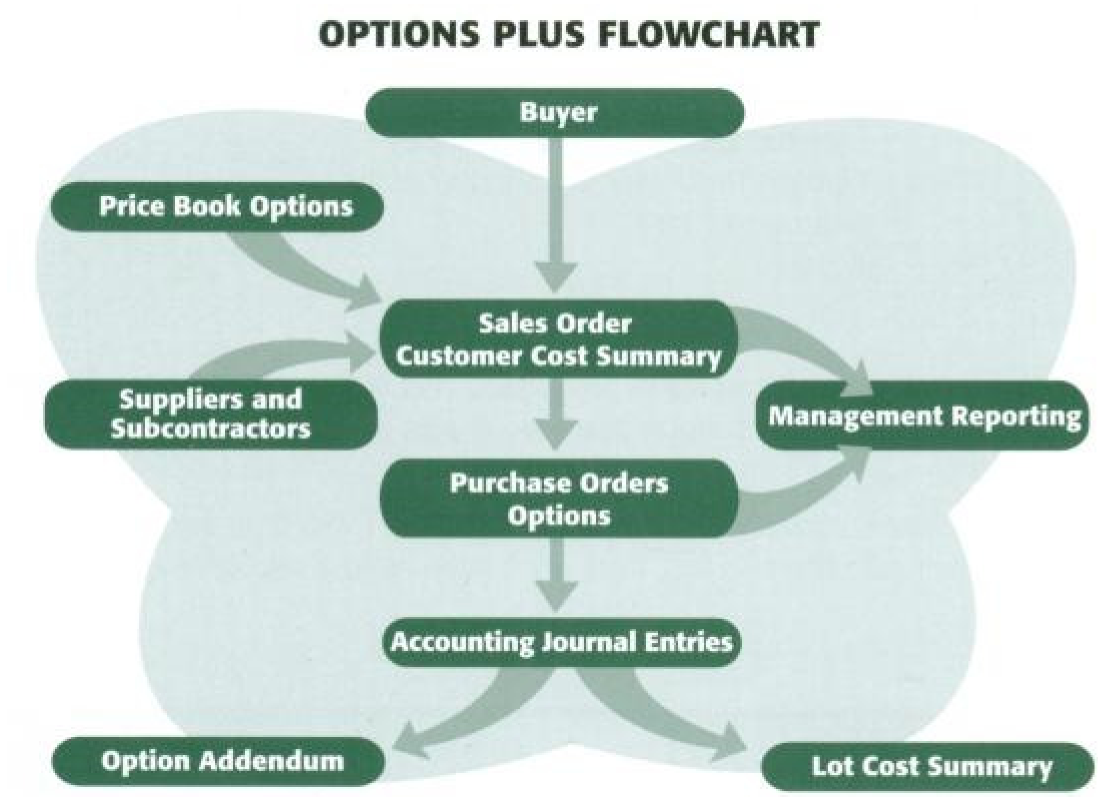
Introduction

Options Plus assists your salespeople from the moment they sit down with the homebuyer on the initial discussion through the final selection of Options. This system completely automates the intensive and time consuming paper process from start to finish by generating accurate options orders. It even automatically generates purchase orders to your subcontractors, provides your superintendents with immediate updates, and keeps everyone on the same page. The database is comprised of pricing, suppliers, and subcontractors, cut-offs, and other vital data which is used to generate orders.



Automated ordering

Auto-generation eliminates Purchase Order typing, and the loss of revenue due to outdated or incorrect pricing or mistakes in calculating.

Plans

Allows for "Plan Specific" option pricing so that your salesperson only gets a listing of options specific for each buyer's plan.

Price Book

All current option prices are maintained on the database. Improving pricing accuracy. Provides professionally printed Price Book.

Prices

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

Purchase Orders

Automatic generation of Purchase Orders with a push of a button.

Sales Orders

System produces a Hard Copy Sales Order for the customer to sign. This can be tailored to each builder's requirements.

Management Reports

- Lot Profit Analysis Summary Report
- Ordered Option Recap by Phase
- Option Purchased by Subcontractor
- and many more

BuyerView

Provide your homebuyer with online Web based access to review and pre-order options for their homes. The simple user interface with option pictures provides the ability for your buyers to create their “wish list” and expedites the order process.

Options Plus greatly increases your staff’s productivity and output capacity. Orders, whether they are customer option orders or supplier purchase orders, are generated in minutes not hours.

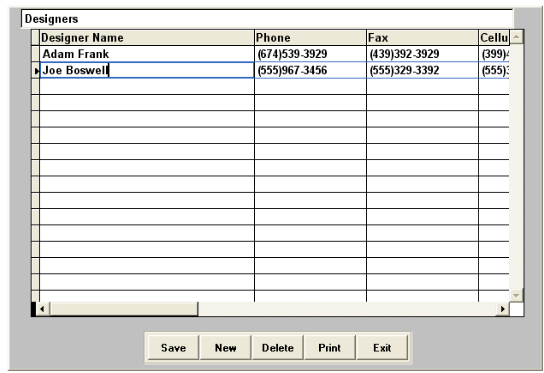
The ***Options Plus*** system allows your salespeople to spend more time with the home buyers and less time with calculators—in fact, they won't even need a calculator anymore.

Buyer Options Specific Setup

This section will take you through the setup requirements for Buyer Options. This section assumes that you have completed the ***common*** database setup, including your Subcontractors and Subcontractor Trade Codes *(as outlined in the Set-Up and Configuration User Guide, pg. 13-14),* and will walk you through creating and processing buyer options or upgrade orders.

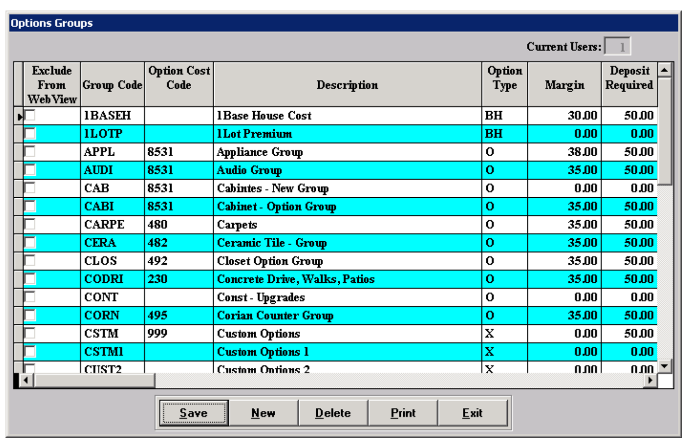
Setting Up Designers

Under **Setup: Options: Designers** you can create a list of designers along with basic contact information. This allows you to assign a designer from a drop down list in the options ordering screen for each buyer.



Setting Up Options Groups

The first thing you will need to do is make sure the ***Options Groups*** are set up correctly. Options Groups are the main categories under which you will assign and group your various options. Although we provide a default list of Options Groups with the system, you may want to modify them to meet your specific requirements. Select **Setup: Options: Options Groups** and the following ***Option Group*** screen will be displayed:



Select **New** to setup a new option group. Each group has an alphanumeric code that precedes each option number in *that* group. We suggest using a consistent four-character code.

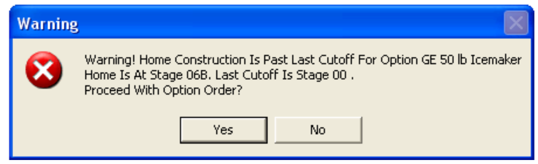
> **Note:** The *Option Cost Code* field is only applicable if it is used for exporting data into your accounting system.

In this screen you can also specify the default ***profit margin*** for a group and the required ***deposit*** or down payment. These values will be carried forward to the Options setup screen and order processing and can be changed at the individual option level when setting up your options. The ***Option Type*** is also defined here. The three valid option types are: ***O*** for standard options, ***BH*** for base house costs, and ***X*** for custom options.

Setting Up the Construction Stages & Cutoff Dates

The construction stages and their cutoff dates play a major role during options ordering. These are the flags that advise the designer/sales person whether an option is able to be ordered or not based on where the construction is for that particular lot (see page 20 for options ordering).

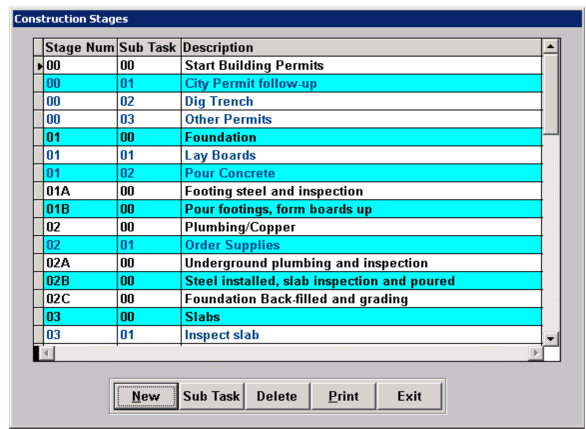
There are two conditions that will determine how and whether you will need to setup the construction stages or the cutoff dates as part of the options setup process.



If you are actively using the Scheduling module then a lot of what follows should already be setup for you and other than checking it is with the person responsible that is all you need to do. However, if your company is not using the Scheduling module or not for the project your working on then you must follow the procedures outlined below.

Construction Stages

Go to **Setup: Construction Stages** to view the master list of stages. To customize or add additional stages select **New** and enter the information as required. All the other buttons are self explanatory. For more information about this screen please refer to the Scheduler Plus user guide.



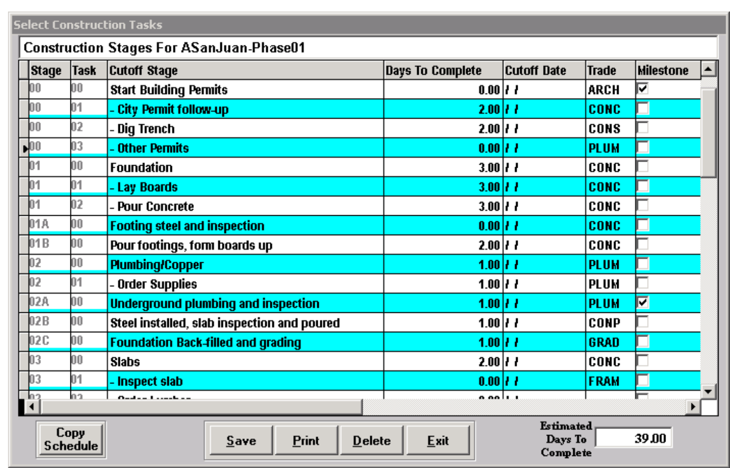
Stage Num	Sub Task	Description
00	00	Start Building Permits
00	01	City Permit follow-up
00	02	Dig Trench
00	03	Other Permits
01	00	Foundation
01	01	Lay Boards
01	02	Pour Concrete
01A	00	Footing steel and inspection
01B	00	Pour footings, form boards up
02	00	Plumbing/Copper
02	01	Order Supplies
02A	00	Underground plumbing and inspection
02B	00	Steel installed, slab inspection and poured
02C	00	Foundation Back-filled and grading
03	00	Slabs
03	01	Inspect slab

Note: Sub Tasks do not pertain to Options.

Cutoff Dates

To enter your cutoff dates go to **Setup: Inventory: Phases: Const Stages** (or if you have the scheduling module **Scheduling: Schedule Days To Complete**).

The screen pictured shows the master list of Construction Stages. For options the only column required is the ***Cutoff Date*** where you enter specific cut-off dates for options cut-offs. This will override the calculated schedule date (if you are using scheduling).



Stage	Task	Cutoff Stage	Days To Complete	Cutoff Date	Trade	Milestone
00	00	Start Building Permits	0.00	/ /	ARCH	✓
00	01	- City Permit follow-up	2.00	/ /	CONC	
00	02	- Dig Trench	2.00	/ /	CONS	
00	03	- Other Permits	0.00	/ /	PLUM	
01	00	Foundation	3.00	/ /	CONC	
01	01	- Lay Boards	3.00	/ /	CONC	
01	02	- Pour Concrete	3.00	/ /	CONC	
01A	00	Footing steel and inspection	0.00	/ /	CONC	
01B	00	Pour footings, form boards up	2.00	/ /	CONC	
02	00	Plumbing/Copper	1.00	/ /	PLUM	
02	01	- Order Supplies	1.00	/ /	PLUM	
02A	00	Underground plumbing and inspection	1.00	/ /	PLUM	✓
02B	00	Steel installed, slab inspection and poured	1.00	/ /	CONP	
02C	00	Foundation Back-filled and grading	1.00	/ /	GRAD	
03	00	Slabs	2.00	/ /	CONC	
03	01	- Inspect slab	0.00	/ /	FRAM	

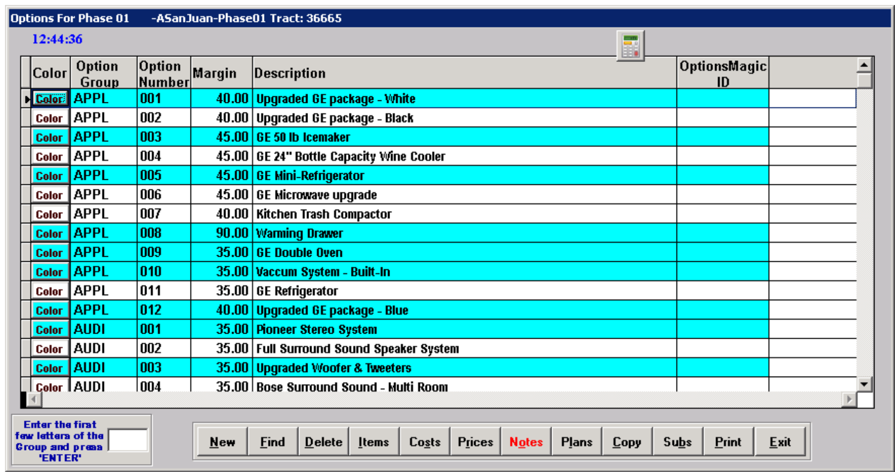
Note: The cutoff dates entered here are for the entire phase and are not lot specific. For lot specific and automated calculation of your cutoff dates, it would require the using the -Scheduling Module.

For more information about this screen please refer to the Scheduler Plus user guide.

Setting Up Buyer Option Items

To begin setting up the options available for a particular phase select **Setup: Options: Buyer Options**. When prompted select the phase to set up the options for by clicking on the side arrow.

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



The main options setup screen pictured (right) will open. All the options setup is done from this screen and is where you will be able to view any previously setup options and change/revise them as necessary. Although options are setup per phase they can be copied from one phase to another (see page 13).

The procedure for setting up options can be broken down into a 4 step process which is outlined below.

Note: A description of each button found on the bottom of this options setup screen can be found on page 12.

Step 1 – Creating a new option and entering the description

After selecting **New,** to create a new option, you will be asked to assign the ***Option Group*** applicable for this option. Click on the side arrow to select the applicable group from the list setup in IBSWIN (page 7) and select the **Add** button to proceed. A new option line item will be created. In doing so the ***Opt Num*** will automatically be assigned the next sequential number for the option group you selected. (E.g. APPL 001, APPL 002, etc)

Note: The ability to override and designate your own option numbering/coding system is available. Just change the settings under the options tab in the **Setup: Company Config** menu and each time you create a new option you will be prompted to enter the **Opt Num** after selection your option group.

The ***margin*** for that option will also be updated from the margin that was setup for the option group selected. You can however override this at anytime to specify the margin at the option level. This margin is in essence the percentage profit that you want for this option item. IBSWIN will automatically calculate the buyer's price based on the margin using the ***cost*** (your cost) that will be entered into the system (see steps 3 & 4 for details).

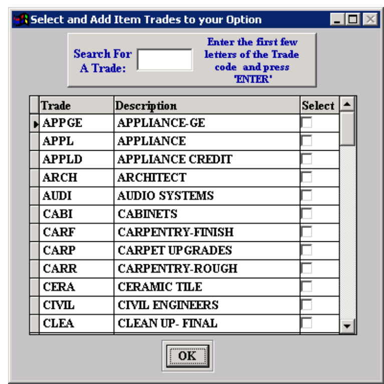
Note: The margin is **NOT** the same as markup. For a comparison chart please go to page 28.

Enter the description for this option (up to 50 characters) in the ***description*** column. When this option is ordered this description will print on the Purchase Orders and Superintendent Reports. If you need additional room to enter your description use the **Notes** button. Anything entered in the notes will print as part of the option description.

The **Color** button on the left of each option gives you the ability to enter the list of colors (if any) available for the selected option. At options ordering time this will allow you to select the desired color from a drop down list for this option. In the buyer setup screen any option that has a color selection will have a red **Color** button.

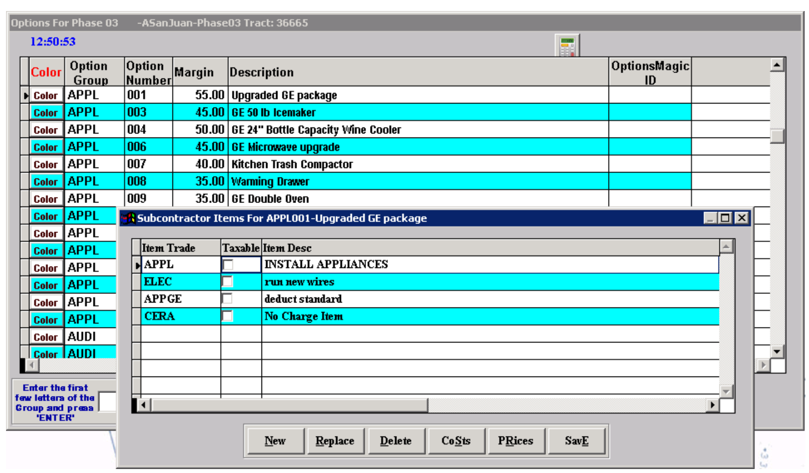
Note: This color function will only work if the ***cost*** and ***buyers price*** are the same for each color. If either your costs or the buyers' price are different you must create a new option specifying the color as part of the description.

Step 2 – Assign the trades for each option item



The second step in setting up options is to assign the trades responsible for installing or supplying the option. This provides the ability to add the cost items for each option (by trade) which in turn determines which Purchase Orders need to get generated.

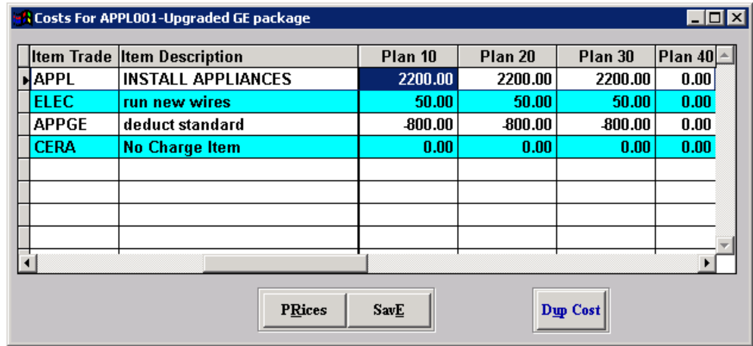
Using the **Items** button from the buyer options setup screen and select **New** to add a new item or trade. Pick one or more trades from the dropdown list and then (if required) you can enter a short description describing the work to be performed by each trade. This description will only appear on the options purchase order for the subcontractor doing the work.



If you select a trade incorrectly, or need to change an existing trade, then use the **Replace** button to safely replace the trade without losing your costs or prices.

Note: The subcontractor(s) who are contracted to do the work must be assigned to each trade in each phase. These assignments can be copied from phase to phase. However, if you are generating contracts in Purchasing Power, then the subcontractor assignments are automatically done. Otherwise, you must assign the subcontractors manually in either the buyer options setup or sequence sheet screens. (See page 14)

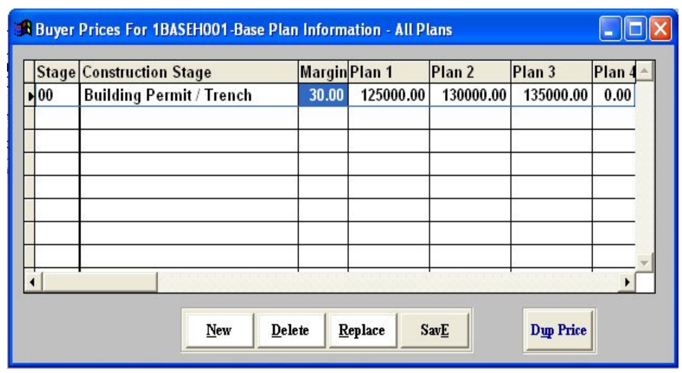
Step 3 – Enter your costs by trade



From the items screen select the **Costs** button to enter your costs as per the subcontractor for each item description. These figures are entered on a per plan basis. Use the **Dup Cost** button (in blue) to duplicate the costs to each plan for that line item.

Note: If you notice that there are plans missing (in this phase) you will need to exit this screen and go back to the main ***Buyer Options*** screen and select the **plan** button. This will allow you to set-up additional plans. For instructions please refer to page 12 in the ***General Set-Up and Configuration*** guide for details.

Step 4 – Entering the construction stage and buyers price



The final step requires you to assign the construction (cutoff) stage for your option and to enter the buyer's price. This is done by selecting the **Prices** button in the costs screen.

Select **New** to assign a ***Construction Stage*** to your option item followed by the buyer's price per plan. The construction stage assigned will be the flag that will warn you at ordering time that this particular option is past its construction date (see page 20)

Note: As you are entering the buyer's prices by ***Construction Stage*** you will have the ability to create multiple price points per construction stage simply by selecting **New** to add the next cutoff point and buyer prices.

If you entered a ***Margin*** the system will calculate the price for each plan automatically. This can however be overridden in 2 ways: change the margin here for this option and the newly calculated price will spread to all the plans, or enter the prices you want manually for each plan. This will override any figures in the Margin field.

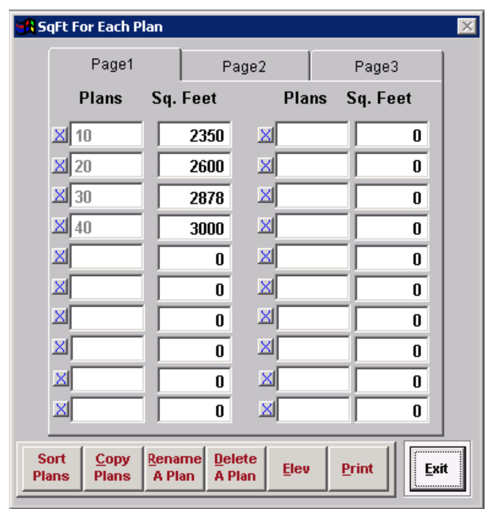
Note: If you are **not** using the margin field to calculate the prices DO NOT change the margin after you have manually entered prices. Doing this will change the prices to the Margin price.

Use the **Dup Price** button to duplicate the price to each plan for the selected construction stage. The **Replace** key lets you to change the construction stage for the selected line item.

Special Note: To exclude an option for a specific plan, enter $1.00 for the option price - This allows you to enter $0.00 price options for standard option selections.

Now hit save and go back through the previous screens hitting save to finalize all levels of detail for this option. Repeat this 4 step procedure to setup each option in your catalogue.

Buyer Options Screen Function Buttons Defined

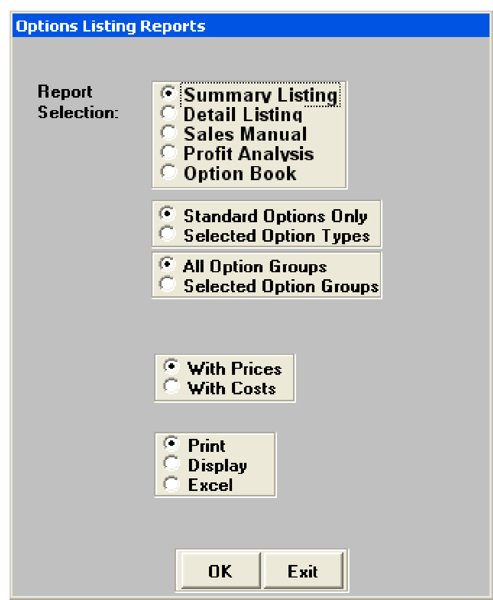
New	To enter a new option. Please refer to Step 1 on page 9 for details.
Find	Helps you find options for specific Options Groups or categories.
Delete	Allows you to delete the selected option from this phase or the entire options list. If you select "No" to delete the selected option, you will next be asked if you want to delete the entire list for this phase.
Items	**Allows you to assign the trades responsible for installing the option.** Please refer to Step 2 on page 10 for details.
Costs	This is a short cut to the costs screen for your selected option. Details about this screen and its functions can be found in Step 3 on page 11 for details.
Prices	This is a short cut to the buyer prices screen for your selected option. Details about this screen and its functions can be found in Step 4 on page 11 for details.
Notes	Allows you to add additional information/description for the selected option and will print on the appropriate reports including your PO's.
Plans	Use this button as a quick access to setup or alter the basic plan and square footage information (found under ***Setting Up Sequence Sheets*** in the ***General user guides***). Only alpha numeric characters can be used for the plan code. In the ***plan*** screen you will find: **Sort Plans** – This will resort the plans into ascending order. **Copy Plans** – This will allow you to copy the plan information to another phase. **Rename a Plan** – will go through the entire database and update information with the new plan code. **Delete a Plan –** This will go through the entire database and delete all options and flooring information with this plan code. **Elev -** Allows you to view and input the elevation specific Sqf information **Print –** print a plan information report with the expanded plan marketing information entered on the screen to the right. **Expanded Plan Marketing Info** – by selecting the gray box with the blue X next to the plan code you will get to the expanded plan information screen. 

<table>
<tr><td>Copy</td><td>

This function is especially helpful because it will allow you to copy options from one phase to another in varying combinations. The following functions are the mains ones usually used when copying options from one phase to another phase within the same project where the plans are the same:

Copy All Options From This Phase To Another.
Copy One Option, All Plans, To Another Phase.
Copy One Option, All Plans, To Another Option.
Copy One Option Group To Another Phase.

Generally when copying between project/phases where the plans are different you would copy the header descriptions and items, without the cost and pricing information, since they are usually not the same from project to project especially when the plans are different anyways. So in that case be sure to use the copy function 2 or 7, with headers and items only, or you can use a combination of other copy functions to mix and match and build an accurate options list.</td></tr>
<tr><td>Subs</td><td>Please go to the next section Assigning Subcontractors to a phase for more details.</td></tr>
<tr><td>Print</td><td>This selection takes you into a secondary screen where you can print the following reports;



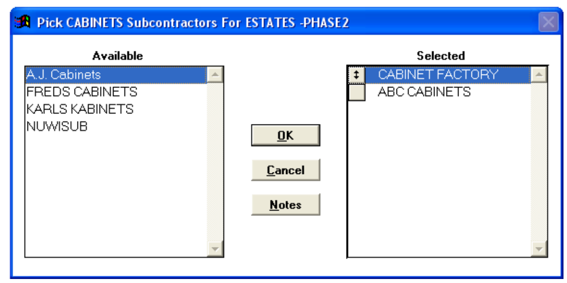
1) Summary Listing: Lists a summary of all the items with either associated costs or pricing per plan.
2) Detail Listing: More detailed version of above report with more categorization options and also gives a breakdown of the profit, actual margin, and cost of goods.
3) Sales Manual: Creates a checklist of options available by plan with the price to assist the sales people when working with clients.
4) Profit Analysis: Gives a detailed breakdown of the profit per lot/homebuyer listing the options that have been purchased.
5) Options Book: Is a checklist of options available for each plan which can be used by the sales department with the homebuyer.</td></tr>
<tr><td>Exit</td><td>Allows you to exit the screen</td></tr>
</table>

Color	Found on the very left hand column for each option this allows you to setup multiple colors for the selected option. Please refer to page 9 under the subheading of Step 1.

Assigning Subcontractors to a Phase

For IBSWIN to be able to generate Options PO's for your options orders it will need to know which subcontractors have been contracted to do the work. If you are using the Purchasing Power module this is automatically done for you as you create your contracts.

To manually assign these (per phase) select the **Subs** button which can be found in either **Setup: Options: Buyer Options** or **Setup: Inventory: Sequence Sheet: Maintain Sequence Sheet**. The following window (right) will appear. Select the trade you wish to assign subcontractors to and select **OK**. Then the second screen pictured will appear.



On the left hand portion of the window you will see your list of available subcontractors according to the trade you have selected. On the right side you will see the ones that have been assigned (or are contracted) to work in this phase. Simply double click on the subcontractors name to assign or un-assign them.

> **Note:** You can have multiple subcontractors assigned to a trade. In this case at ordering time you will be prompted to select the appropriate subcontractor for that particular option.

The **Print** button prints the list of subcontractors assigned to this phase and the **Copy Subs** button lets you copy the subcontractors assigned to other phases.

Other Set-up Screens

Update Options Costs - This screen provides an easy way to update the costs of options for an entire trade for each plan in a phase using one simple screen. This is ideal to use if you change subcontractors and costs need to be changed in bulk.

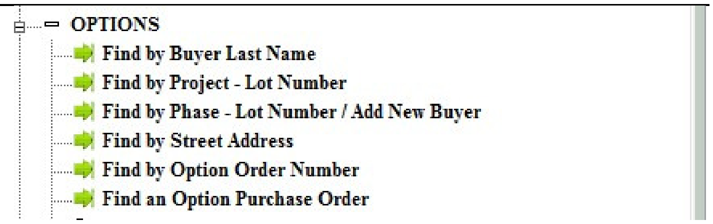
Update Options Prices - Similar to ***Update Options Costs*** except in this case it is to update prices by option group. You also have the ability to replace the Construction Stage if necessary.

Takeoff Items Detail - This screen allows you to enter detail takeoff items for base house options. This is for non-spec builders. Please call pharaoh for more information.

Update Resources Costs - This ties into the Takeoff Items Detail screen above. Please call for further information.

Option Price Adjustment Utility - This tool allows you to be able to change the price of options by a % adjustment. For instance if there is a 10% price increase for one or more option groups you can do it from this screen.

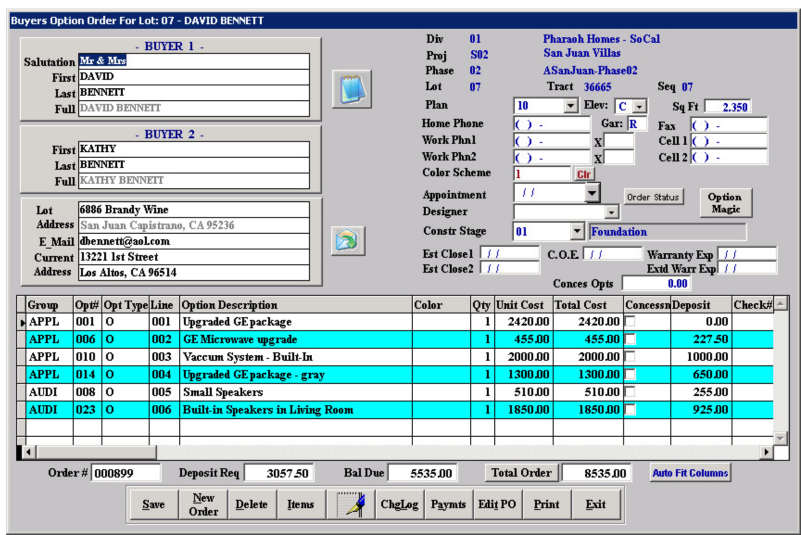
Processing Option Orders



Now that you have completed the setup of your options database you are ready to start entering option orders. From the main menu select the **Options.** If you have an existing options order you would like to view/edit you can do this in five different ways:

1) Find By Buyer Last Name
2) Find By Project - Lot Number
3) Find By Phase - Lot Number / Add New Buyer
4) Find By Street Address
5) Find By Option Order Number.

Adding a New Homebuyer



The **New Homebuyer** selection allows you to add a new homebuyer to the system and make their options selections. Initially you will be asked to select the phase you are selling options for.

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

A list of lots available in the selected phase will appear.

> **Note:** If a lot has been sold previously the buyer's last name will appear in the ***Buyer*** column.

Select the lot and click on the **OK** button to display the ***Homebuyer Option screen***. Start by entering the buyer's last name, full name, and other pertinent buyer information Please refer to the ***Homebuyer Screen Defined*** section on the following page for information about the various fields found on this screen. Once completed, you are ready to create an order (see page 20).

Homebuyer Screen Defined

The top portion of the screen (on the previous page) shows the **Buyer Information**. Anyone with the appropriate security rights may edit any information– see your system administrator for assistance. Below is a description of the key features of the screen above.

Buyer Information Defined (Top)

Phase, ***Lot***, ***Tract***, ***Seq***, ***Div***, and ***Proj*** describe which home the current buyer record belongs to.

Full Name is what will print on all reports and letters where the buyer’s name appears. Please make sure that the name appears here as you would like it to appear in all correspondence with the homebuyer.

Address is filled in from the sequence sheet and is the address of the *new* home that is being sold; do not enter the buyer’s current address here. The city, state, and zip code is referenced from the phase records and can be changed if needed.

Closed is the close of escrow date. The ***Expired*** date is automatically calculated based on the warranty period that was entered during setup using the ***Closed*** date (close of escrow - if available at the time of data entry).

Est Close would be used in cases where escrow dates have yet to be determined.

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

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

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

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

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

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

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

Column Fields Defined (Middle)

The second half of the window is devoted to entering and listing all the options for the lot. If the lot has been Pre-plotted, existing options will be displayed (see page 21 for Pre-plotting Options).

Group**, **Opt#**, **Line#, & ***Option Description*** are assigned automatically as you select the option to be purchased.

Opt Type is also automatically with *O* representing standard options and *PR* for pre-plot options. This can be changed by selecting the drop down and allows you to change a standard options to a pre-plot and a pre-plot to a standard option if necessary.

Color can either be entered here or if entered during the set-up you will have a predefined drop-down list to choose from (see page 10 for details).

Qty can be updated as necessary and is the number of units desired.

Unit Cost is taken from the cost details entered during the options setup.

Total Cost is calculated by multiplying the *Unit Cost* by the *Qty* desired.

Concessn allows you to make an option a concession option. When selecting this the *Conces Opts* field will automatically increase and will be handled accordingly in some of the options reports.

Deposit is calculated by the percentage amount entered in the options group code and can be overwritten.

Check# is an optional field to enter the buyers check number.

Date Sold is the date the option was selected and can be manually updated if necessary.

Room allows you to input the room or location that the option will be installed in.

Installed is where you can input and track the date the option was installed.

The line below the options list provides additional information about the options.

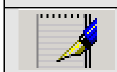
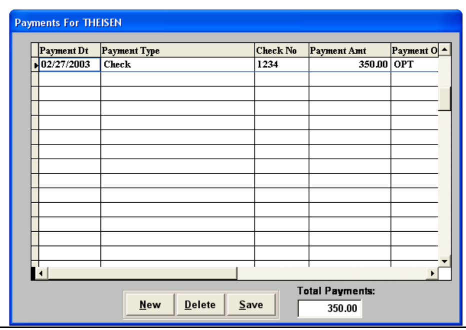
Order # displays the order number for the highlighted option.

Deposit Requested is calculated by the percentage deposit entered in the options group code.

Balance Due shows the outstanding option amount excluding any payments.

Total Order shows the total amount of the Options ordered.

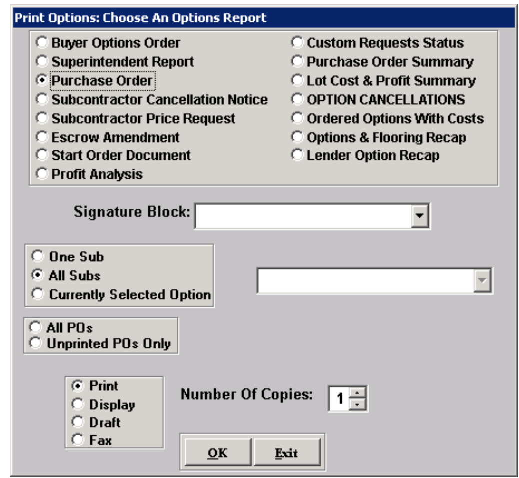
Function Buttons Defined (Bottom)

Save	Allows you to save the options for the lot. The save button *will not* exit you from the screen. If you do not hit save upon exiting this screen you will be prompted to save the order.
New Order	Please refer to the **Creating a new Options Order** section on page 20.
Delete	Highlight and delete a specific item from the order. A record in the ***ChgLog*** will be created. In addition, if a PO has been printed, the system will prompt you to print a *Cancellation Notice* for the subcontractor and buyer and it will be tracked in the **OPTIONS CANCELLATIONS** (In the Print selections).
Items	Allows you to review the trades assigned to each option along with a description of the work to be performed and the applicable subcontractor code. (See page 10 for more details) **Note:** The item list cannot be edited. It is a view only screen.
	This is the ***Notes*** button which allows you to add any special notes or additional descriptions to each line item.
ChgLog	Provides a simple way to log changes to the option order. These will appear on the Buyers Option Contract. The ***ChgLog*** will turn *red* if changes exist. Option deletions will automatically update this change log.
Paymts	Allows you to log buyer's payments for the options ordered. Select **New** and the ***Payment Dt*** will appear in automatically as today's date (this can be overridden). Select the ***Payment Type*** from the drop down list followed by the ***Check Number*** *(if applicable),* and the ***Payment Amount***. These payments will print on the Buyer Option Contract. Select ***Save*** to exit and save entries in the payment screen. *(For a definition of each of the Payment Types please see page 27)* 
Edit PO	This button allows you to edit or change an existing options purchase order. For details please refer to page 23.
Print	This is where you will print the key Option Order reports. In addition, this is where you generate and print the Purchase Orders. As with all reports you can either **Print** or **Display** and each comes with its own set of filters and criteria to present the information you require. A brief explanation of some of the reports are provided below. ***Buyer's Option Order*****:** This generates your buyer option agreement which can be printed by date range. ***Superintendents Report:*** When this is selected the same range field appears as above along with option to include Contract Amounts and/or the Change Log and is ideal for you Superintendent to be able to track the options ordered on this lot.

<table>
<tr>
<td></td>
<td>

Purchase Order: When this is selected, you will be given the following choices: **One Sub, All Subs,** or **Currently Selected Option**

Note: If One Sub is selected, you will be prompted to select a sub.



You will also need to choose whether or not to print all PO's or unprinted ones only. If you have Batch Faxing then you can fax these PO's directly to your subcontractors from your computer.

***Subcontractor Cancellation Notice*:** This has the same three subcontractor choices as the Subcontractor Purchase Order report above.

***Subcontractor Price Request*:** This is for custom options only (see page 22).

***Escrow Amendment*:** You will be asked to choose a Signature Block.

***Start Order Document*:** When this is selected, you can select either *All Options* or *Selected Option types*. If you pick Selected Option Types you can choose from *Base House Costs Standard Options*, *Pre-plots* and *Custom*.

***Profit Analysis*:** When this is selected, you have two sets of choices, 1) All Options or Selected Option Types or 2) All Options Groups or Selected Option Groups.

Custom Requests Status, ***Purchase Order Summary***, & ***Option Cancellations*** do not prompt for any additional information.

Lot Cost & Profit Summary: Gives the option to include standard PO costs and gives you a full overview of the entire lot including sales prices, and all costs associated with the lot. If complete information is input into IBSWIN during the set-up of projects, Sales Manager Plus and the Purchasing Power modules then this can be a very powerful and complete overview.

Ordered Options with Cost: Provides fields to enter the date range to print and the option to include the *Option Notes* and *Contract Amounts.*

Note: Additional options reports can also be found under the **Reports: Options** menu.

Options & Flooring Recap provides a document that provides a summary of Options and and Flooring that has been purchased.

Lender Option Recap create a document that can be handed to lenders that summarizes and categorizes the options ordered that can be given to a lender.

</td>
</tr>
<tr>
<td>

Exit

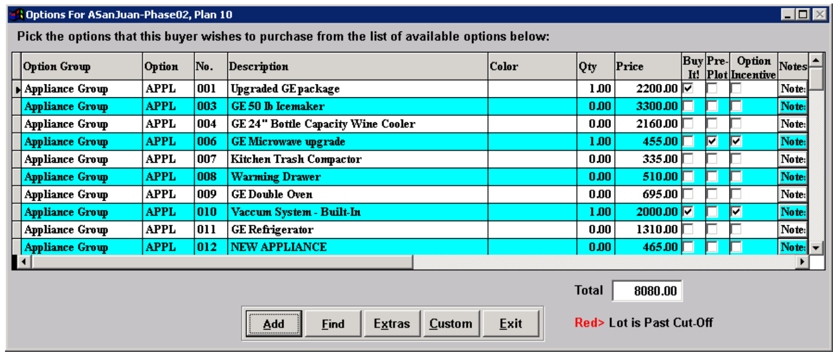
</td>
<td>Exits the Homebuyer screen but not before giving you the option to save in case you forgot.</td>
</tr>
</table>

Creating a new Options Order

By selecting the **New Order** button (on the ***Homebuyer Screen***) a window will open listing the options that are available for that specific phase and plan.

Select the items to be included in the option order by checking the ***Buy It!*** check box and **Add** them to the order.

The **Color** column allows you to select any predefined color choices from a drop down or you can enter them manually. You can also change the ***Qty*** as necessary. Either of these can be changed after adding them to the order.



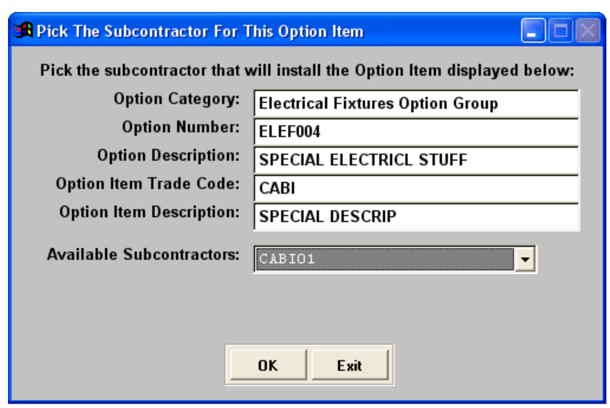
The ***Pre-Plot*** & ***Option Incentive*** columns display options added to a lot prior usually during the sales process. (See next page for details).

As you select items the ***Total*** of the order will increase accordingly on the bottom right sowing the buyers cost. Items displayed in red are past their construction cutoff stage. If you choose to order that item, you will be warned before being able to **Add** these items to the final order if you have the appropriate security.

The **Find** button gives you easy access to jump straight to a particular option group without having to look for it. The Extras and Custom buttons are for ordering custom items that are not part of your options catalogue. Please refer to pages 21 & 22 for details.

Items with alternative subcontractors

If any of the option items ordered involve trades that have multiple subcontractors assigned/contracted then the screen to the right will appear. This screen lists the details of the selected option. Review this and then click on the arrow to the right of ***Available Subcontractors*** field to select the subcontractor responsible for completing this task. Click **OK** to save the selection. The same screen will appear for applicable item.



Warning: Be careful to select the correct subcontractor for each option item. The accuracy of your PO's depends on this. If multiple option items have more than one sub assigned be aware that there is nothing that clearly tells you that you are moving from one item to the next item during this selection process. Please read each screen carefully before you click **OK**.

Pre-Plot Options

To add ***Pre-plot Options*** you use the same *homebuyer screen* as you would for standard options ordering. There is no need to add a buyer's name on a lot when pre-plot options are being added. Just find the appropriate record by using one of the three find functions available under the main options menu: **Find By Project - Lot Number**; **Find By Phase - Lot Number**; or **Find By Street Address**.

> ***Warning***: Do **NOT** add a ***fictitious*** buyer to the lot as it will have to be cleared before a buyer can be added. This can also create confusion and will appear in some reports.

Options are pre-plotted at the time they are added to the lot. To order options as pre-plotted, click **New Order** on the main ***Homebuyer screen*** and select the appropriate checkbox under the ***Pre-plot*** column (located to the right of the **Buy it!** column). Once completed select the **ADD** button and the options selected will now be listed in the Homebuyer Option screen.

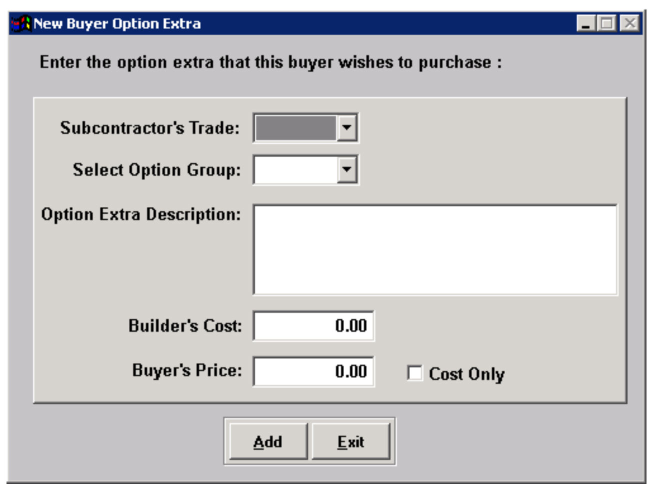
All Pre-plotted options appear with zero amounts in the ***Homebuyer Option Screen*** and the ***Type*** column (on the far right) will display **PR** for pre-plots. The total price of the pre-plot options ordered will automatically adjust the sales/base price for that lot. These amounts will appear on the sequence sheet.

Ordering Non-Standard (Custom) Options

In *IBSWIN* you also have the ability to order additional non-standard options. These are broken down into two main types, Extra and Custom options. To order (or create) custom options you do so from the main ***Options Selection Screen*** using either the **Extras** or the **Custom** buttons to do so.

Extras

Extras are option requests that are not part of the standard option selection. They can be used when only ***one*** subcontractor is required to complete the option order, or to add any additional costs to an option that has been ordered already.

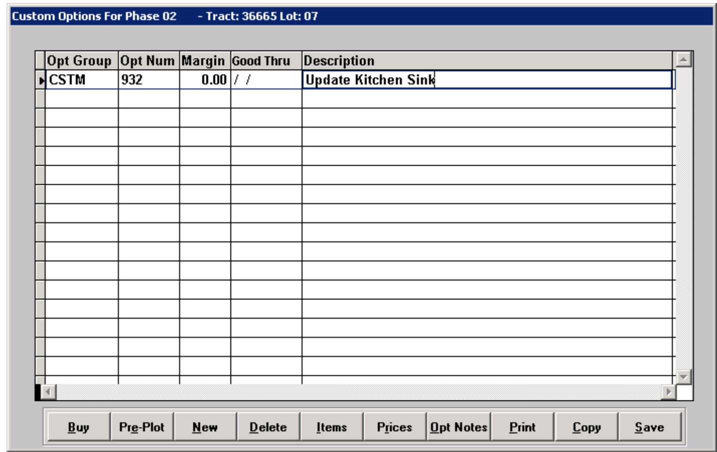


When the extras screen opens, select the trade and then type the description followed by the ***Builder's Cost*** and ***Buyer's Prices***. The ***Cost Only*** check box will allow you to add the extra without a price.

Click ***Add*** to save and exit this screen and add the option to your order. **Exit** to leave this screen without saving.

> **Note:** There is no way to alter the price once an Extra is added. If you require a price request print the ***Option Pricing Request*** and then delete it and add it back in with the price later.

Custom Options



Use the Custom Options function when multiple sub-contractors are required to fulfill the options order. After selecting the **Custom** button the setup screen (right) will open. It is in this screen that you can add multiple items.

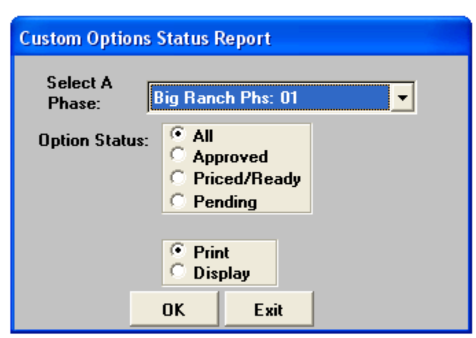
Begin by selecting **New**. When prompted you will be asked to choose a custom option group. The ***Option Number*** and ***Margin*** will automatically appear on the Custom screen. Enter a margin if desired, and type a description (up to 50 characters) for the option. To add additional details, click on the ***Opt Notes*** button and type as much information as necessary to fully explain what the custom option must include.

You will notice that the procedure here to set-up a custom options is very similar to setting up your standard options in the buyer options screens. The 4 step procedure outlined on pages 9-11 applies here with only a few differences.

The ***Good Thru*** date is when the offer to purchase a particular custom option will expire. Use the **Items** button to assign the trades and steps required to complete the option. See page 10 for details**.** The **Price** and **Cost** details will also need to be entered for each option once you have these details. When the custom option is first entered it will be put into ***Pending status*** until pricing has been established with the subcontractor. The *Custom Option Pricing Request for the Subcontractor(s)* report can be used for this purpose.

Once pricing has been established (and entered) the custom option will automatically be put into ***Priced/Ready status***. It is at this time that you can check with the buyer if they agree to the price. If so, then the option can be ordered using the **Buy** or **Pre-Plot** button depending on the circumstance. The option will then be moved into ***Approved*** status and will appear in the list of options ordered in the main *Homebuyer screen.*

Note: When you exit the **custom options** screen you will not see the custom option in the order screen until the custom option is priced and purchased via the **BUY IT!** button. During these various stages of creating and ordering a custom option its status will be changed accordingly.



The status of custom orders can be printed using the ***Custom Requests Status*** report found via the **Print** button on the Homebuyer screen (pictured on page 15) or under the **Reports: Options Reports** menu. This report (pictured on the following page) helps you track and monitor your custom options by letting you know at what stage in the sales process they are.

Pharaoh Homes - SoCal

CUSTOM OPTIONS STATUS REPORT

03/03/2003
Page 1

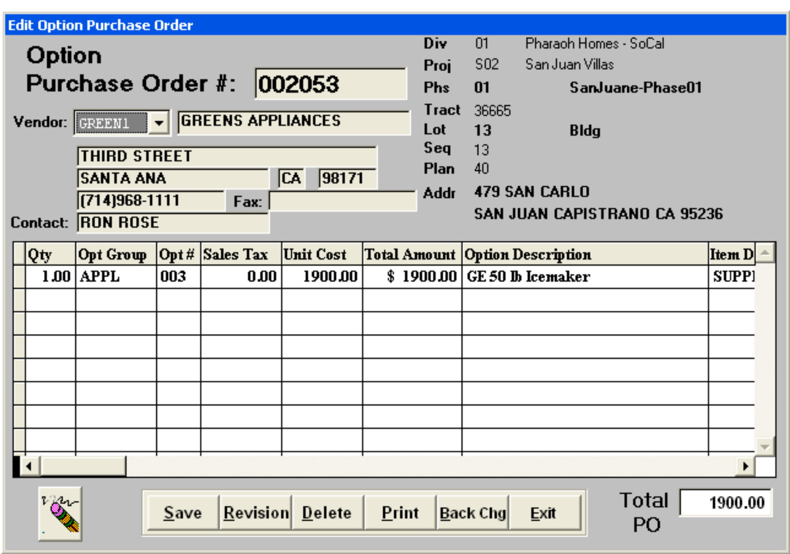
Project: S02	San Juan Villas		
Phase: 01	SanJuane-Phase01	***STATUS:***	***All***

Lot	Tract	Pln/Elev		Buyer	Category	Opt#	OrigDate	Status	Description
1	36665	20	B	TEST1					
					CSTM	901	/ /	**Priced/Ready**	Special Book shelf as per model - add electrical for computer system and other office stuff....
					CSTM	902	/ /	**Pending**	Provide customer with custom shelves & mirrors - in master bathroom..
12	36665	10	A	**HOPE**					
					CSTM	903	04/24/2000	**Priced/Ready**	THIS IS A TEST CUSTOM OPTION...
13	36665	40	A	**GREEN**					
					CUSTM2	901	12/14/2000	**Approved**	Builtin Pool per specs

The **Copy** button allows you to copy the selected custom option to another phase.

Editing Options Purchase Orders

Using the **Edit PO** button found on the Homebuyer Screen (pictured on page 15) you can edit or change existing PO's that have been generated for your subcontractors. After selecting this button a little window will open with a dropdown list of all the options PO's (by subcontractor and PO number) that have been generated for this lot. By selecting the applicable PO the following ***Edit PO screen*** will open.



This screen will allow you to revise the PO or even delete the entire PO or specific line items using the **Delete** or **Eraser** buttons. To add an additional line/item to the PO, use the **New** button. Any additional lines will appear as a revision on the new PO. You can also change the subcontractor using the ***Vendor*** field if necessary.

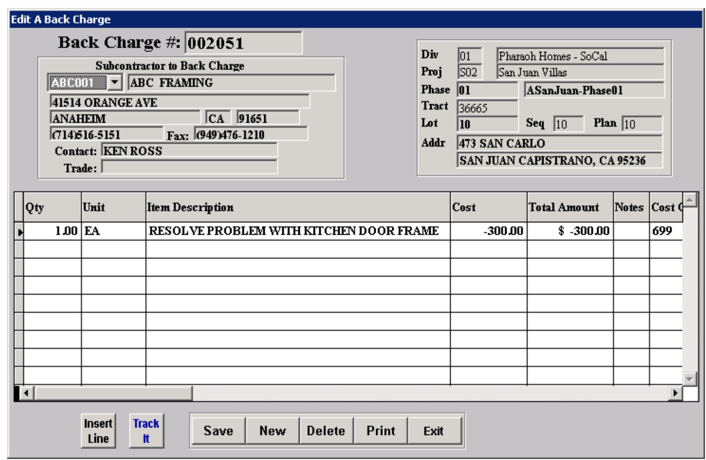
Please Note: If you are exporting your PO's to an accounting program only the additional lines will be exported ***if*** you have already exported this PO previously. If not then the entire PO will export completely with any changes. It is NOT recommended that you change or modify an existing line as this will NOT export.

Back Charges

A Back Charge is a credit purchase order which is made when a subcontractor damaged something in the process of installing the option upgrade. Found directly under the main Options menu you will immediately be offered three selections to choose from:

Adding a Back Charge

Select **Options: Back Charge: Add Back Charges** from the main menu. Once you have selected the phase and lot (if applicable) the following screen will appear.



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

Back Charge main screen columns defined

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

2. To print or display your Back Charge select the **Print** button. You will be given the choice to either display, or view, an actual Back Charge or print an ***Intent to Back Charge.*** You can also add any custom verbiage you may require and to include or exclude the line item notes.

3. To save a Back Charge select **Save**. To erase an item, select it, and then press the **Delete** button. **Exit** will close the PO/Back Charge screen and will always prompt you to save any changes. Select **Yes** to save and exit or **No** to exit without saving.

Miscellaneous Back Charge Menu Items

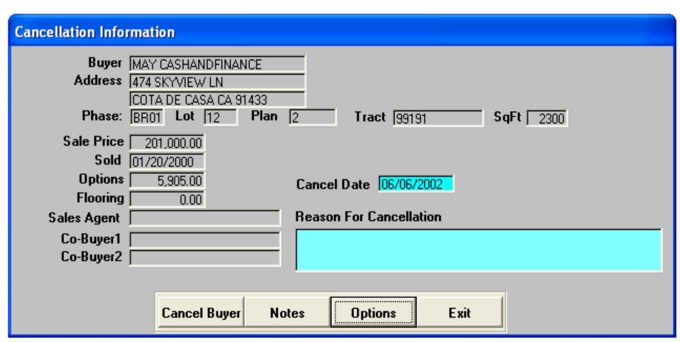
These are other menu items found under the **Options: Back Charge** menu (see screen image on page 24) which are briefly described below.

1. **Find and Edit a Back Charge:** Allows you to find your desired back charge by its number or to view a list of all Back Charges from all phases and projects by leaving the Back Charge number field blank.

2. **Back Charge Summary by Phase:** Print or display a ***Report*** that lists and totals the cost of each Back Charge per phase.

Buyer Cancellations

This option allows you ***cancel*** existing buyers. For each cancellation a sales cancellation record is created. Each menu option provides a series of search methods to find the buyer that you are interested in.



Both the ***Cancel a Buyer*** (pictured) and ***Cancelled Buyers*** screens are the same except for the **Cancel Buyer** button which is replaced with a **Delete** button in the *Cancelled Buyers* screen. The **Cancel Buyer** button cancels a buyer and the **Delete** button deletes the cancellation record permanently. The buyer's records will then be removed permanently with the option to convert the buyer to a prospect. The lot will then be made available for sale. You will have a choice to turn any options ordered into pre-plot options. Doing so will automatically update the base price of the lot. For options that are not desired as pre-plots, they can be deleted from the main option ordering screen (for that lot) like normal.

Both the ***Cancel a Buyer*** & ***Cancelled Buyers*** screens allow you to view any options ordered.

Batch Fax Options PO's

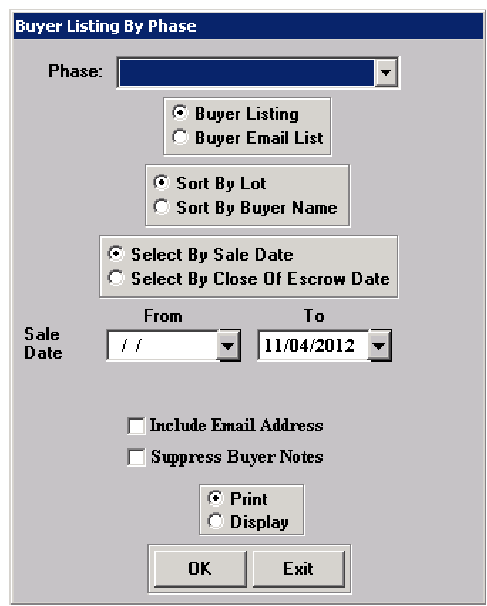
If you have the batch faxing add-on activated then it is from the **Batch Fax Options PO's** menu item that you will be able to bulk fax your PO's to your subcontractors. Please refer to the batch fax user guide for details.

Buyer Listing

Under the Options menu you will be able to print a buyer listing report by phase or by project.

There are many selections and/or sort criteria available including: ***Buyer Name***, ***Lot #, Sales Agent/s, Sale Date, Close of Escrow Date***, with or without ***Notes***, all within a range of desired sale dates.

There also is a **Buyer Email Listing** that can be run from this selection.



Appendix #1 - Payment Types / Deposit Calculation

The list below outlines the various payment type codes available in processing options (& flooring) orders in the options plus module. It will also provide clarification of certain calculated amounts and totals as they currently appear on the Buyer Option Order and how they affect the specific option reports.

Payment Type	Affect On Various Option Reports
C - Cash	Affects the **Bal Due** calculation. Use for non-financed options. It is included in the **Order Payments** amount on the ***Buyer Option Order***, but does not affect the ***Escrow Amendment Request*** report.
CK - Check	Affects the **Bal Due** calculation. Use for non-financed options. It is included in the **Order Payments** amount on the ***Buyer Option Order***, but does not affect the ***Escrow Amendment Request*** report.
CT - Credit Card	Affects the **Bal Due** calculation. Use for non-financed options. It is included in the **Order Payments** amount on the ***Buyer Option Order***, but does not affect the ***Escrow Amendment Request*** report.
CF - Finance Cash	Affects the **Bal Due** calculation. Assumes cash back at the end of the Escrow. It is included in the **Order Payments** amount on the ***Buyer Option Order*** and also in the **Add To The Sales Price** section on the ***Escrow Amendment Request*** report.
F - Finance	Affects the **Bal Due** calculation. Assumes no cash back at the end of the Escrow. It is included in the **Order Payments** amount on the ***Buyer Option Order*** and also in the **Add To The Sales Price** section on the ***Escrow Amendment Request*** report.
CR - Omit Credit	Does not affect the **Bal Due** calculation. It is not included in the **Order Payments** amount on the ***Buyer Option Order***. It does affect the **Omit Credits** section on the ***Escrow Amendment Request*** report.
SD – Security Deposit	Affects the **Bal Due** calculation. It is included in the **Order Payments** amount on the ***Buyer Option Order*** and also in the **Security Deposits** section on the ***Escrow Amendment Request*** report.
CD – Concession Deposit	Does not affect the **Bal Due** calculation. It is included in the **Order Payments** amount on the ***Buyer Option Order*** and also in the **CRC Deposits** section on the ***Escrow Amendment Request*** report.
CS – Condition Of Sale	Affects the **Bal Due** calculation. Use for non-financed options. It is included in the **Order Payments** amount on the ***Buyer Option Order***, but does not affect the ***Escrow Amendment Request*** report.
OT - Other	Affects the **Bal Due** calculation. Use for non-financed options. It is included in the **Order Payments** amount on the ***Buyer Option Order***, but does not affect the ***Escrow Amendment Request*** report.

Appendix #2

Markup vs. Margin
Cross Reference Chart

Markup %	Margin %
10	9.0
15	13.0
20	16.6
25	20.0
30	23.0
35	25.0
40	28.5
45	31.0
50	33.3
55	35.0
60	37.5
65	39.0
70	41.1
75	42.0
80	44.4
85	45.0
90	47.0
95	48.7
100	50.0