



*“Solutions for Connectivity”*



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## What is CPS Enterprise?

*CPS Enterprise is the premier software suite for Homebuilders.*

**CPS Enterprise** is an Enterprise level suite of applications for Homebuilders. It is the most flexible, powerful, and scalable suite of applications available on the market today. It consists of several different modules, which work together to eliminate dual-entry, and cumbersome conversion processes.

### About Modules

**CPS Enterprise** is broken down into modules. Think of a module as a separate program that shares its interface and all of its data with each of the other modules. Throughout this **User's Guide**, different icons will be used to represent each product described within that section.

◆ **SQLSalesBuilder Maintenance** is the utility used to manage the set-up and maintenance of **SQLSalesBuilder** information. If **SQLSalesBuilder** is to be used, this is the primary location for entering the information shared by each CPS Enterprise application.

◆ **SQL ScheduleBuilder** is the tool for managing tasks and communicating with contractors during the process of new home construction.

◆ **SQL WarrantyWatcher** is the tool for managing and tracking service issues by recording and categorizing all communications as service applications. Once an application is recorded, each item within can be individually categorized or assigned as necessary.

◆ **SQLSalesBuilder** is the tool for entering prospect information, presenting sales and option selections and preparing the sales agreement package. It has a uniquely intuitive interface designed to allow a salesperson to guide a prospective homebuyer through the process of selecting a site and options that meet his or her needs. **SQLSalesBuilder** has it's own sales agent-oriented **User's Guide**.

### How CPS Enterprise organizes data

**CPS Enterprise** organizes data in a hierarchical manner representing the logical structure of a company and its workflow. The structure is as follows: Company, Division, Community, and Lot. When considering the individual

modules the hierarchy continues. **SQLScheduleBuilder** employs task or schedule items. **SQLSalesBuilder** enables sales agents to work with prospects to display available inventory, process sales and prepare the sales agreement and option selection documents. **SQLWarrantyWatcher** continues with Service Application and Work Order.

In addition to the company hierarchy, users also have a hierarchy determining their privileges. Some users may have access to a certain community; others may have access to an entire division. These roles are determined by setting the user permissions (see **Adding User Permissions**).

## How this User Guide is Organized

This **User Guide** is organized from a task-oriented standpoint. Rather than reading this **User Guide** from cover to cover, it's much more efficient to flip to the section you wish to learn more about, and then follow any other references from there.

Many sections of this **User Guide** are specific to one or a few of the **CPS Enterprise** products; therefore each section is marked with icons to designate which product it applies too.



**SQLSalesBuilder**



**SQLScheduleBuilder**



**SQL WarrantyWatcher**

Additionally, other CPS applications work in conjunction with these CPS Enterprise Products. These applications have their own **User Guides** but are mentioned in this one when the information is pertinent.



**SQLWalkWrite**

## Conventions Used

Some of the terms you mentioned in this **User Guide** are standard computer terms. There are also a few new terms that are specific to **CPS Enterprise**.

- **Click:** Depress and release left mouse button.
- **Double-Click:** Depress and release left mouse button twice rapidly.
- **Screen:** Page or window of application.
- **Key:** a list item on the left navigation bar.
- **Open/Expand a Menu Node:** Click on the small box to the left of a key description.

- The **Plus** sign  indicates that the node is currently closed. The **Minus** sign  indicates that the node is already open (or expanded).

## Getting Started

*Knowing what to expect before installing CPS Enterprise is a good way to prepare for your roll-out.*

### Installation

#### System Requirements

For **CPS Enterprise** to run on your computer, it must meet the following **minimum** system requirements:

- 500MHz Pentium III;
- 128MB RAM;
- 500 MB free hard drive space;
- Microsoft Windows 98 (second edition), 2000, or XP
- Display resolution of 800 x 600 (higher recommended)
- Windows XP (or PCAnywhere version 10.5 or higher) and an Internet connection required for interactive technical support.

#### Installing CPS Enterprise

- 1.) Place **CPS Enterprise** CD-ROM into your drive
- 2.) Browse the CD-ROM drive:
  - a. Open **My Computer**
  - b. Double-click on the CD-ROM drive icon
- 3.) Double click the **setup.exe** icon

- 4.) Follow through each step of the installer.

When finished, **CPS Enterprise** will be located in your **Start Menu**, under the **Programs/CPS Enterprise** folder.

## Set-up and Configuration

*A well-planned setup is key to a smooth rollout. This Chapter reviews the basics regarding CPS Enterprise Administration including establishing your organization and its structure as well as adding corporate personnel and their user permissions.*

♪ CPS Enterprise manages all of the applications. Because different users utilize different applications within CPS Enterprise, this Chapter will discuss the key elements common to all applications. Consult the application-specific chapters for more detailed information such as establishing trades, lots, etc.

## Your Company and its Divisions

### Setting up your Company

After you've installed **CPS Enterprise**, you'll need to begin the initial steps of configuration. Fortunately, because all **CPS Enterprise** modules share information, you need enter this data only once.

The Configuration process can be broken down into several key steps:

- Establish the System Administrator;
- Establish the Company Administrator(s)

To set up your company, log in as a **System Administrator**. The system administrator is the highest level user; however, this log in does not have access to any of the company specific data. Therefore, you'll only need to use the **System Administrator** to set up your company, and to set up any other **System Administrators**. You can also use a **System Administrator** account to disconnect users from **CPS Enterprise**. Your CPS rep will provide you with the initial **System Administrator** name and password.

### Logging in as the System Administrator

- 1.) Open **CPS Enterprise**. You'll be presented with the login screen.



- 2.) Select the **Application** you wish to administer by clicking on the dropdown arrow (▼) and highlighting your selection. Log in as a **System Administrator** with the CPS-provided Name and Password.
- 3.) If this is your first time logging in as the **System Administrator**, you may wish to change the **System Administrator** password. To do that:
  - a. Expand the **Administration** menu node.
  - b. Select the **System Administrator** menu item.
  - c. Re-type a new System Administrator password.



- d. Be **absolutely** sure to record this new password in a secure location. If this password is forgotten or lost, it cannot be recovered.
- e. Click the **Save** button.

Next, you'll need to add your first company. The company is the highest level on the organization hierarchy.

**Adding a Company**

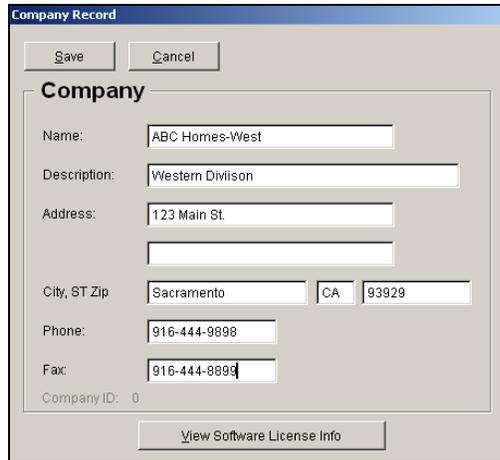
- 1.) While logged in as **System Administrator** (see the **Logging in as the System Administrator** section for details on how to do this), expand the **Administration** menu node.



- 2.) Click on the **Company List** menu item. This section allows you to see up (if appropriate) various entities within your corporate structure (for example, ABC Homes-West, ABC Homes-East, etc.). Note: you may have only 1 company record (depending on how your organization is structured). Consult your CPS rep if you have questions as to how to establish your organization. **This is a critical first step.**



- 3.) Click the **New** button.
- 4.) Enter the company name and any other information:



- 5.) Click **Save**.



## Adding a Company Administrator User

Now that you've added a company, you'll need to set up a **Company Administrator**. A **Company Administrator** is a user that has full access to all of an organization's Divisions and Communities. This user also establishes other users and defines their access rights to the rest of the **CPS Enterprise** and its modules. Anyone who needs unrestricted system-wide access to all company data should have **Company Administrator** rights. Be careful when assigning this privilege: users with Administrator access have the ability to do setup and/or modify company data.

To add a **Company Administrator**:

- 1.) While logged in as the **System Administrator** (see **Logging in as the System Administrator** for details on how to do this), expand the **Administration** menu node.
- 2.) Click on the **Company Administrators** menu item.



3.) Click **New** and add the appropriate information:

The screenshot shows the "Company Administrators" form. It includes buttons for "Save", "Cancel", and "User Permissions". The form contains the following fields:
 

- Company: Testa Homes (dropdown)
- Office Phone #: 916-444-9988
- Fax #: 916-444-8899
- Name - First: Kathy
- Last: O'Brian
- Job Title: Systems Mgr
- Home #: 916-333-9988
- Mobile #: 916-545-1234
- Email: kobrian@testahomes.com
- Send To:  Email  Fax
- Address: 1234 Main St.
- City, ST Zip: Sacramento CA 92929
- ContactID: 0

4.) Click the **User Permissions** button to establish **this** Company Administrator's **User Name** and **Password**:



5.) Enter a user name and a password

The screenshot shows the "User Permissions" form. It includes buttons for "Save" and "Cancel". The form contains the following fields:
 

- User Name: kobrian
- Password: \*\*\*\*
- (confirm): \*\*\*\*

- a. We suggest using a consistent naming convention scheme for users (ex. first initial, last name: John Smith = jsmith).

- b. Be sure that users change their passwords at least every 30 days, especially administrators. Remind everyone to use passwords that are easy to remember but hard to guess.

- 6.) Click **Save** to save user permissions.
- 7.) Click **Save** again to save the new user.

You've completed the company setup process. You are now ready to add divisions.

♪ Before you can access Company specific information, such as Divisions, you'll need to exit **CPS Enterprise**, and re-log on as a user with **Company Administrator** rights.

**Company Administrator Log On**

- 1.) Open **CPS Enterprise**. You'll be presented with the login screen:



- 2.) Log in as a **Company Administrator**:

For the rest of this chapter, it is assumed that you are logged into the program as a user with **Company Administrator** rights. Some of the features and tools you will use may be accessed by users of other levels; however, for set-up purposes it is necessary to have access to the entire company.

## Adding Divisions

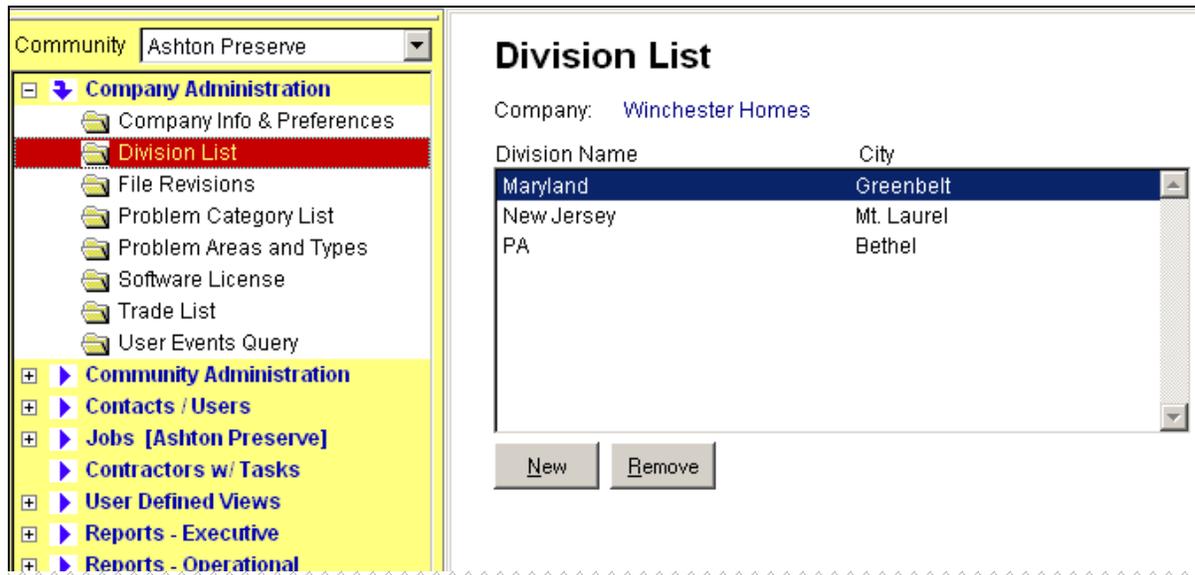
It's now time to begin configuration and set-up of your company-specific information. The **Division** is a container for communities and is useful for separating data if your organization has several divisions within it.

♪ If your company has only one division, simply enter the company as the division, and create all **Communities and assign personnel** within it.

- 1.) Expand the **Company Administration** key in the navigation area.



2.) Click on the **Division List** menu item.



3.) On the right pane, click the **New** button.

4.) Enter the division name, and all other identifying information. Press **Save** when you're completed; add any additional **Divisions** necessary for your organization.

**Division Record**

Save Cancel

Division Record Preference Items

Name: New York

Division #: 487

Description: New York Region

Address: 392 W. Fifth Ave.

City, State Zip: New York NY 03021

Phone: 212-333-4499

Fax: 212-333-9944

Division ID: 0

## Defining Company Preferences

**Company Preferences** contain various user-specific application settings that “customize” **CPS Enterprise** for your organization – they include report header/footers, durations, and other descriptions. The preferences are specific to each **CPS Enterprise** Module, i.e. **SQLWarrantyWatcher** will have different preferences than **SQLScheduleBuilder**.

- 1.) Expand the **Company Administration** menu node.
- 2.) Click on the **Company Info & Preferences** menu item.
- 3.) On the upper pane, click the preference you wish to modify (WarrantyWatcher example shown below).

♪ You may wish to consult with your CPS representative regarding various **Preferences** settings.

The screenshot shows a web application interface. On the left is a navigation tree under 'Community Administration' with options like 'Company Info & Preferences', 'Division List', 'File Revisions', etc. The main area is titled 'Company Info & Preferences' and shows 'Company: Winchester Homes' with an 'Edit Company' button. Below is a table of preferences:

Item	Value
Acknowledgement Letter	
Aging Days - Period 1	7
Aging Days - Period 2	14
Aging Days - Period 3	30
Offer Letter	
Service App Footer	
Service App Header	
Sort Menu Lot List by Block	
Sort Menu Lot List by Phase	No
Warranty Period (# of Days)	365
Work Order Instructions	

4.) In the box located at the lower left, enter the desired value for the preference:

The dialog box has a title 'Change Value To:' and a 'Save' button. The text input field contains 'My Service Application footer text'.

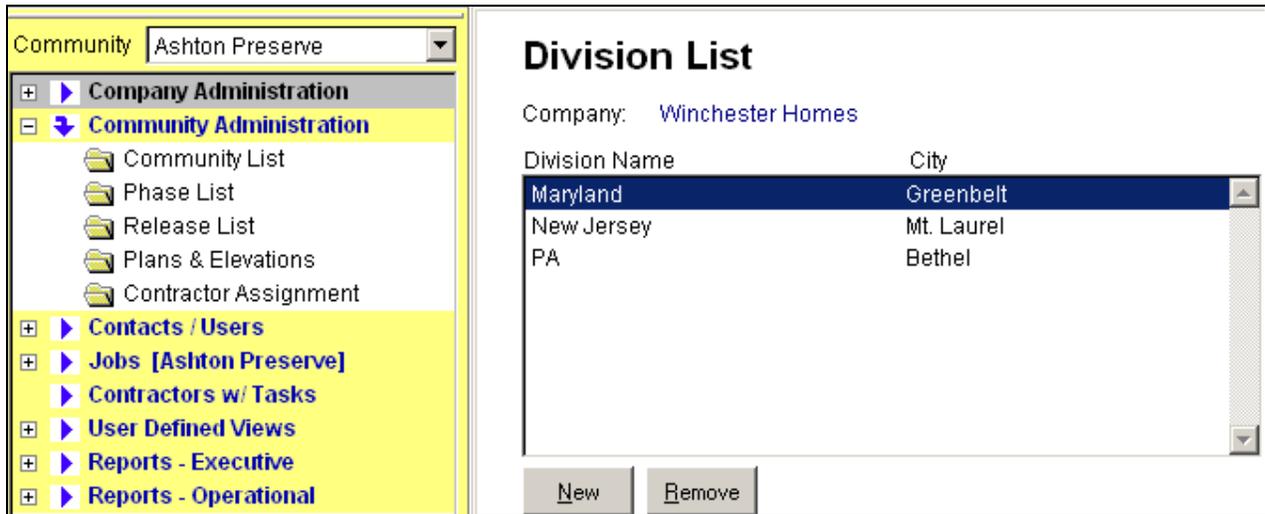
5.) Click **Save**.

## Communities

### Setting up Communities

**Communities** are third in **CPS Enterprise's Company/Division/Community** hierarchy. Communities contain all the lot (or job) information. To add a new **Community**:

1.) Make sure you're in the appropriate **Division**; then expand the **Community Administration** menu node.



- 2.) Click the **Community List** menu item.
- 3.) Click the **New** button.
- 4.) Enter the **Community** name and any other important information (**Number** and **Code** are used for quick reference in some reports):

The 'Community Record' form contains the following fields and values:

- Name: Briarcliff Manor
- Number: BI
- Code: BI
- Description: Briarcliff Manor
- Address: 67 Briarcliff Rd.
- City, State Zip: Annandale MD 83928
- County: St. George
- Phone: 313-222-0173
- Fax: 313-222-0176
- Project ID: 162728

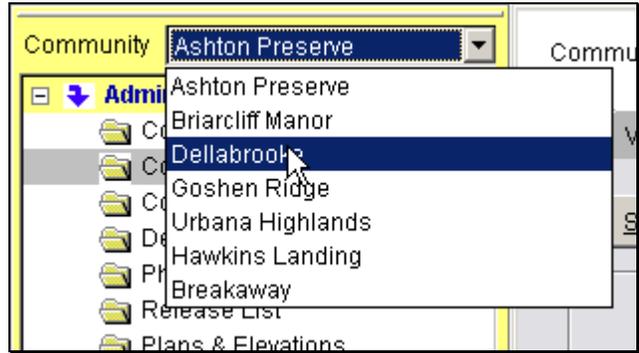
Buttons for 'Save' and 'Cancel' are located at the top of the form.

- 5.) Click **Save**.

**Changing Communities to Add/Edit Data**

To change **Communities** in any of the **CPS Enterprise** modules:

- 1.) Select the community by opening the **Community** combo box in the upper left hand portion of the screen (you must have previously established the appropriate **Division**):

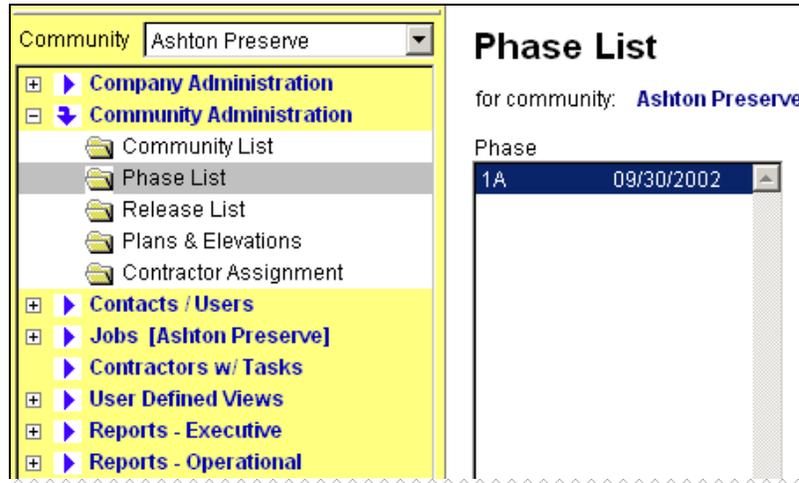


- 2.) Select the **Community** you wish to change to.

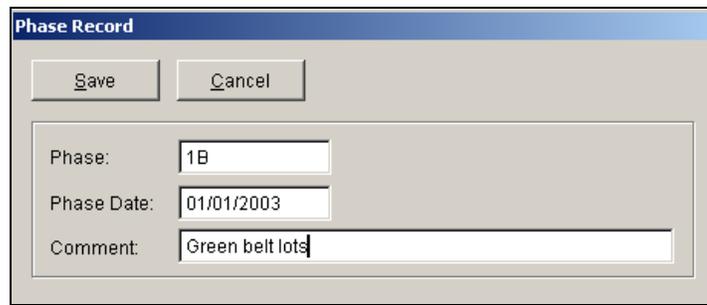
## Phases, Releases and Blocks

**CPS Enterprise** uses **Phases, Releases and Blocks** as a means to organize lots – just as you do. Use of **Phase/release/block** isn't mandatory; however, these items are used in certain parts of **CPS Enterprise**, including reports, to group and/or sort jobs (lots). Generally, builders utilize the lot number plus one of these “identifiers” to describe a specific lot (such as Lot 23/Block 2 or Lot 23/Phase 4). **Phases** and **Releases** are formally established as drop down selections (meaning only pre-determined **Phases** or **Releases** are available; **Block** doesn't utilize drop down choices).

- 1.) Expand the **Community Administration** menu node.
- 2.) Click on the **Phase List** or **Release List** menu items.



- 3.) Click the **New** button to input a new release.
- 4.) Enter the **Phase/Release** number (or letter if appropriate), the **phase / release** date, and any additional comments:



- 5.) Click **Save**.

## Company Personnel

Company personnel (users) are the employees that will be a part of the **CPS Enterprise** work cycle. Company personnel can be office personnel, sales agents, field representatives, etc. You will need to “authorize” individuals to become CPS Enterprise users – and you can provide them with complete or limited access capabilities.

♪ No two organizations are alike – some builders want the corporate/division office to coordinate lot releases and plan pricing. Others give lot input responsibility to sales agents. You must survey your organization to determine how to assign user permissions and access. Consult your CPS rep if you need assistance.

### Adding Company Personnel

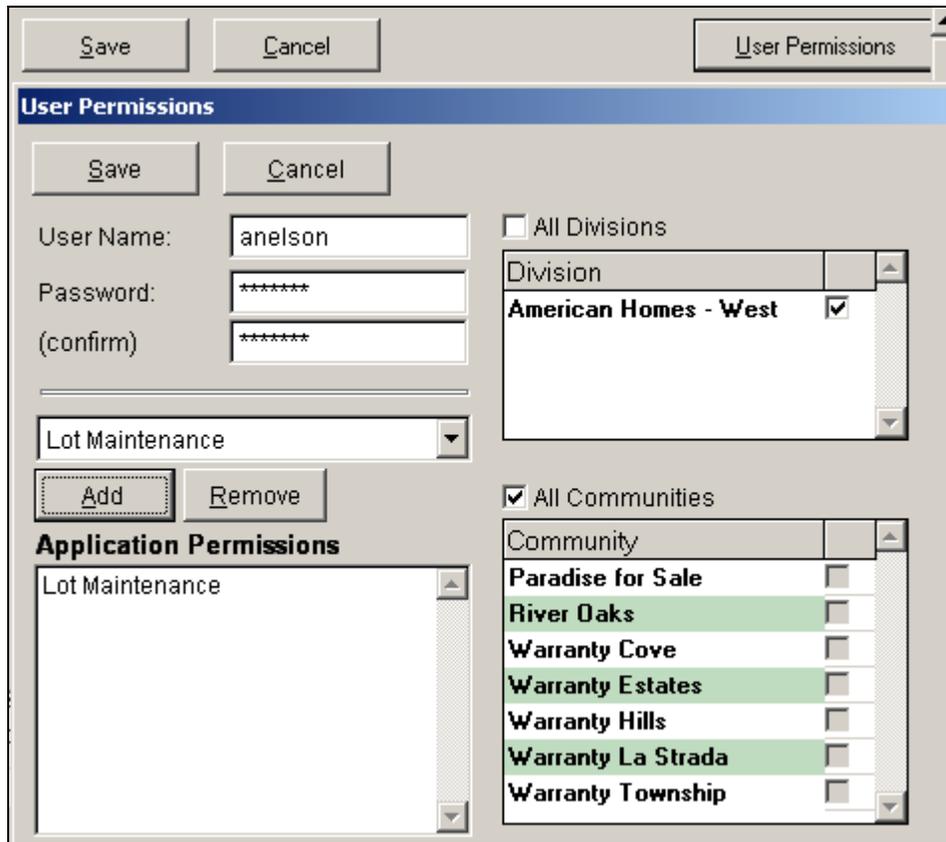
- 1.) Expand the **Contacts / Users** menu node.



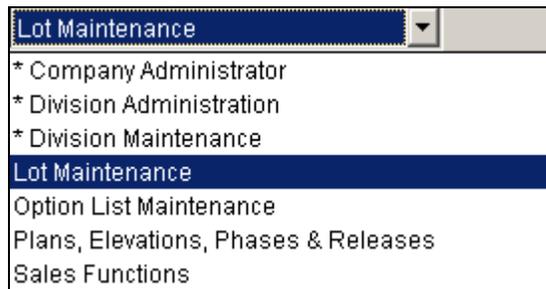
- 2.) Click on the **Contacts/Users** menu item.
- 3.) Click **New** and you will be presented with the same screen used to establish Company Administrators.



- 4.) Enter all pertinent information. Email and fax are used for report distribution. When finished, press **User Permissions**. The example below displays a completed User Permissions screen; however, there are several steps involved which are discussed in detail.



- a. **User name and Password.** Each user has a distinct user name and password which is setup at the corporate/division office. Type this information and press **Save**.
- b. **Application Permissions.** The next step is determining which functions this user will perform. Drop down the choices (determined by the application you entered), make the selection for the specific user and press **Add**. Following is a **SQLSalesBuilder** example:



- c. **Division Access.** As you can see from the list above, some permissions are broader than others. If you selected either Division Administration or Maintenance, you'll want to specify the division (assuming there is more than one). You may specify **All Divisions – or remove the All Divisions check** and specify the division.

- d. **Community Access.** Some functions can be further limited – down to the community level – for users such as sales agents and customer field representatives. **All communities** is selected initially (as in our example, below). If you wish to narrow the list, uncheck **All communities** and specify the specific community. Some users may need access to multiple communities – this can be accomplished by checking multiple names.



- 5.) Click **Save** to save the access and permissions.

**Changing User Permissions**

The situation may arise where a user needs his or her access level raised or lowered. To change a users’ permission level do the following:

- 1.) Follow steps 1 – 4 from the ‘Adding User Permissions’ section above.
- 2.) Click on the permission listed in the list and click **Remove**.
- 3.) Apply a new permission (see **Adding User Permissions** for details).

**Advanced Configuration Settings**

Congratulations! You’ve setup the basics required for any of the three **CPS Enterprise** applications. You’re ready to continue through the **User’s Guide** to the chapter discussing additional setup activities – as well as the applications themselves.

However, there are a few, more advanced common activities which you may wish to review once you start using **CPS Enterprise**.

## SQLSalesBuilder Configuration

*SQLSalesBuilder contains a number of configuration items that are unique to it – including special Community, Lot and Plan considerations as well as the Master Option List.*

**SQLSalesBuilder Maintenance** allows you to manage not only many of the configuration items common to the **CPS Enterprise** , but also some items which are unique to **SQLSalesBuilder**.

To access these configuration items you must be logged in as an **Administrator** with rights. You must also log into the **SalesBuilder Maintenance** portion of **CPS Enterprise** (See **Logging In** for more information)

### Community Configuration

The bulk of the customization for **SQLSalesBuilder** is located within the **Community Configuration** screen. We'll step through the basic configuration items first; more advanced topics will be discussed at the end of the chapter.

All items within **Community Configuration** apply only to the community currently selected. To change the currently selected community see **Changing Communities** in **Chapter 2**. To access **Community Configuration**:

- 1.) Expand the **Administration** menu node.
- 2.) Click on the **Community Configuration** menu item and you'll be presented with a series of screens collecting information about a specific community: This screen is actually a series of screens designed to collect information about the community so that SalesBuilder can accurately calculate the move-in costs and monthly payments and your users can have screens customized to their sales needs. This section will discuss, in detail, the various configuration screens, their use and input choices.

Seller	Visual	Directives	More Directives	Taxes & More	Financing
Save					
Community A.K.A.	Paradise Caribe				
Opened:	10/12/2002	Tot. Lots:	75		
Area/Region:	West	Deliv. Time:	0		
Sales Agent Title:	Your Community Sales Representative				
Week Starts:	Monday				
Bond Fee Desc.:	Mello Roos Bond				
Assoc. Fee Desc.:	HOA				
Legal Seller Name:	American HomeBuilders Inc.				
Move-In/Monthly Top Text					
The information provided is for your review and is only an estimate. ALL HOME AND OPTION PRICES ARE SUBJECT TO CHANGE. Please,					
Move-In/Monthly Bottom Text:					
Thank you for your interest in our beautiful new home community located in the beautiful Green Valley area.					

### Seller Options

The seller options screen (pictured above) appears first when you open Community Configuration. Input provided here allows you to configure some of the defaults and names used in various places within **SQLSalesBuilder** and on many reports and contracts.

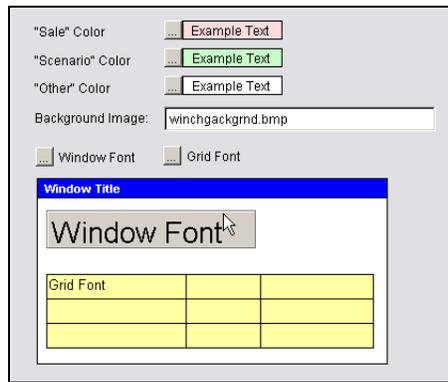
- **Community A.K.A.** – Optional additional community name; used on reports and particularly useful if the community name is extremely long.
- **Opened/ Total lots, etc.** – Date community was opened; Total number of lots to be released, etc.; used on reports to calculate sales data such as sales/month, etc.
- **Sales Agent Title** –Sales agent description used on prospects and buyers handouts. Builders utilize a variety of descriptions including Community Manager, Sales Counselor, etc.
- **Week Starts** – Day of week used to calculate schedule for certain reports – particularly the Traffic Report. Most builders use a Monday-Sunday schedule.
- **Bond fee description** – Optional, used in the calculation of Move-In costs and Monthly payments for prospects and buyers. New home communities frequently have special assessment districts, etc. and this field collects the name for the special fee.

- **Assoc. Fee Description** – Optional, used in the calculation of Move-In costs and Monthly payments for prospects and buyers. Many new home communities have Homeowner Associations; this field collects the association name.
- **Legal Seller Name** – Many builders utilize **SQLSalesBuilder** to prepare and print their Purchase Agreement package. Some builders utilize different legal entities in different communities; this field collects the legal entity name to print on the sales agreement documents.

**Move-In/Monthly Top/Bottom Text:** - Your agents will be able to provide prospective buyers with a detailed handout explaining the Move-In Costs and Monthly payments associated with their home. Many builders want to provide additional information and disclaimers. This information is optional – however, many builders take advantage of the space for special marketing information as well as legal information disclaimers.

**Visual Options**

**Visual Options** allow you to configure many of the colors and fonts plus the background image used in **SQLSalesBuilder**. Some builders like to have the **SQLSalesBuilder** screen mirror the “look and feel” of their community color scheme; others want to have prospect information identified in a different color than buyers. You’re able to configure the environment in a manner pleasing to you.



- To change the screen colors, click on the left side of the item you wish to change: . Make a selection from the chart:



- It's easy to add a logo or picture to the "main" **SQLSalesBuilder** screen by providing a file to be displayed on the "main" screen. Provide the file name as the **Background Image**.

♪ The background image file must be located in the default SalesBuilder folder on every system for it to display properly.

- You're also able to modify the standard font used within **SQLSalesBuilder**, click the button to the left of the font you would like to change, select the font you want, then click **OK**.

**Directives**

- **Directives** provides many of the more advanced configuration options. The top portion allows builders to "customize" **SQL SalesBuilder** use, e.g., do you want to load "standard" options automatically? Consult your CPS rep for a complete discussion of these items. In addition, you are able to specify the file paths used for application use and storage as well as backup information. Again, don't hesitate to consult your CPS rep for a detailed explanation of the file locations.

♪ **Remember: SQLSalesBuilder** provides your sales offices with a "offline" capability – that's one of the reasons why you're specifying the local harddrive as a location for data and files. If they're unable to connect to the central SQL database, they're still able to operate.

<input type="checkbox"/> Use Standard Options	<input type="checkbox"/> Use Related Options
<input type="checkbox"/> Finance Funding Fee	<input checked="" type="checkbox"/> Include \$ w/ Option Handout
<input type="checkbox"/> Use Option Cut-Offs	Use Numeric Compa ▾
Local "Application" Data	c:\cps\static\data
Local "Community" Data	c:\cps\data
Reports Folder	c:\salesw32\reports
Contract Application File	
Contract Template(s) Folder	c:\salesw32\reports
Contract "Save" Folder	c:\salesw32\reports
Local Back-Up Folder	c:\salesw32\data\backups

- **Use Standard Options** – Determines whether or not standard options are automatically loaded for a selected lot in the SalesBuilder option list. Typically, "standard" options are those items included in the base price but requiring a color or style choice (such as appliance color, lighting package style, etc.)
- **Use Related Options** – Determines whether or not related options are used. Many builders develop option relationships so that, for example, **SQLSalesBuilder** "adds" a "hood" if the "cooktop" is ordered.
- **Finance Funding Fee** – Determines whether VA funding fee can be financed or is required to be paid "up front."

- **Include \$ w/ Option Handout** – Determines whether option prices appear on the options sheet handout given to prospects. Some builders don't want to provide such detailed information at the prospect level – the handout can still contain the items they're interested in plus the total price – just not all the detail.
- **Use Option Cut-Offs** – Determines whether option cut-off stages are used for to control option selections. If you decide to use cutoffs, each lot's stage of construction needs to be kept up-to-date. This process is easy if you're also a **SQLScheduleBuilder** user; however, you may need to evaluate your organizations' capability if you're a **SQLSalesBuilder**-only user.
- **File Paths** – Please, utilize all the pre-set file path names unless advised otherwise by a CPS Representative.

**More Directives**

**More Directives** includes additional path configuration items – generally, regarding **Follow-up**. Some builders want their agents to manage customer follow-up at the sales offices; others like to manage follow-up letters, calls, etc. from the corporate/division office. Typically, your installation contains file settings designed for sales office use. If you want to change the follow-up responsibility, please consult your CPS Representative.

Follow-Up	
Labels File:	labels.doc
Realtors Label File:	rlabels.doc
Merge File Name:	mmerge.dbf
Merge File Folder:	c:\

**Taxes & More**

This section contains factors used to determine a community's property tax rate, insurance, etc. The factors are essential to the accurate calculation to the Move-In costs and Monthly payments – particularly if SQLSalesBuilder is preparing the sales agreement package. Of course, many of these factors (such as tax impounds, etc.) change during the year (sometimes significantly); you're able to adjust them as frequently as necessary. **THEY ARE ESTIMATES.** Please, review the factors with your CPS Rep as well as your lender to make sure the calculations are as accurate as possible:

Tax Impounds:	3
Insurance Impounds:	14
Association Impounds:	2
Bond Impounds:	2
Interest Proration:	15
Tax Rate:	1.250
Insurance Rate:	2.500

- **Tax Impounds** – Number of months of property tax collected at closing .
- **Insurance Impounds** – Number of months of insurance collected at closing.
- **Association Impounds** - Number of months of association collected at closing.
- **Bond Impounds** - Number of months of bond (special assessment) fees collected at closing.
- **Interest Proration** – Estimate as to the number of days interest proration – typically set to either 15 or 30 in order to provide a “cushion” for estimating purposes.

**Lender**

This section contains information about the current community’s default (or preferred) lender: This information is printed on the prospect handout so prospects can consult with the builder’s suggested lender.

The screenshot shows a software interface with a form titled "Preferred Lender Information". At the top, there is a field for "Loan Group(s)" which is currently empty. Below this, the "Preferred Lender Information" section contains several fields with the following values: Company: Home Mortgage Inc., Loan Rep: Joe Nemeth, Phone: (916)456-7890, Fax: (916)123-4567, Email: joenemeth@hotmail.com, and Address: 23489 Sunrise Avenue, Citrus Hei.

Loan Groups is an optional field. We’ll discuss loans separately; however, **SQLSalesBuilder** can create lenders with special loan types so that you can assign lenders based on community attributes (such as a VA/FHA lender, a conventional lender, etc.)

## Deposits

The deposits section allows you to pre-set up the deposit types (earnest money, reservation, option, etc.) used to prepare and print your Purchase Agreement package:

The screenshot shows a window titled "Deposits" with a list box containing three items: "2nd Deposit", "Earnest Money", and "Option Deposit". The "Option Deposit" item is currently selected and highlighted in blue.

In the example (above), the builder takes an initial Earnest Money Deposit; then takes a second Earnest Money Deposit and, if there are options/upgrades, takes an Option Deposit. Each deposit described is identified by type and amount.

- To add a new **Deposit**:
  - 1.) Click the **New** button.
  - 2.) Enter **Description**, **Amount**, **Deposit Type**, and select **Project** and **Deposit** order if applicable. Some builders take a flat amount (e.g., \$5,000) and others take a percentage (e.g., a 50% options/upgrades deposit). SQLSalesBuilder accommodates both based on whether the input is great than (>) or less than (<) 100. Additionally, SQLSalesBuilder can mathematically manipulate various deposits (e.g., \$5,000 earnest money plus 10% of the options/upgrades); if you want calculations, check the appropriate box (see your CPS Rep for more details and clear instructions as to how your sales agreement package functions).

- 3.) Click **Save**.

## Establishing Inventory

SQL SalesBuilder needs information about what your sales agents are going to sell in each community. The process is very similar to what you’re probably already doing in the sales and marketing area – establishing plans (including plan names and base prices), designating plan elevations, creating groups of lots to be sold (usually called releases or lots) and providing information about the individual lots themselves (lot premiums, inclusions/exclusions, etc.)

## Plans

- 1.) Expand the **Community Administration** menu node.

- 2.) Click on the **Plans and Elevations** menu item.
- 3.) Click the **New** button below the plan list.

- 4.) Required information includes: **Plan Name** and **Plan Number**. Initially, you may not know (or have) much additional information; however, at some point you will need to provide the **Base Price** and, if applicable, the **Monthly Fees** (bond assessment and HOA fees). **Square Feet, Allowance, Floor Price, Pictures** and **Details** are optional input.
- 5.) Click **Save**; continue adding all your plans for this community.

## Elevations

**Elevations** are an optional part of **CPS Enterprise**. They are used strictly for your informational purposes.

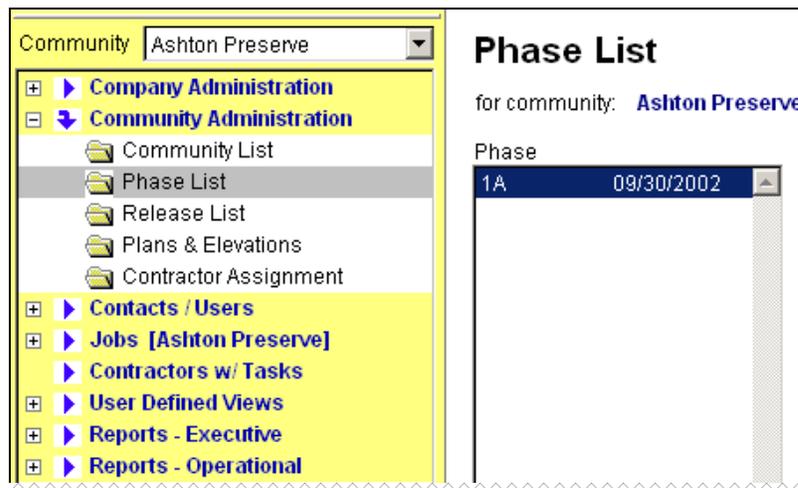
- 1.) Select/highlight the desired **Plan**. 🎵 Elevations are unique to a Plan (that is Plan 1 may have elevations A and B, while Plan 2 has elevations B and C).
- 2.) Click the **New** button below the elevation list.
- 3.) Enter the **Elevation Name**.

- 4.) Click **Save**; continue entering this Plan’s elevations.

## Phases, Releases and Blocks

**CPS Enterprise** uses **Phases, Releases and Blocks** as a means to organize lots – just as you do. Use of **Phase/Release/Block** isn’t mandatory; however, these items are used in certain parts of **CPS Enterprise**, including reports, to group and/or sort jobs (lots). Generally, builders utilize the lot number plus one of these “identifiers” to describe a specific lot (such as Lot 23/Block 2 or Lot 23/Phase 4). **Phases** and **Releases** are formally established as drop down selections (meaning only pre-determined **Phases** or **Releases** are available; **Block** doesn’t utilize drop down choices).

- 1.) Expand the **Community Administration** menu node.
- 2.) Click on the **Phase List** or **Release List** menu items.



- 3.) Click the **New** button to input a new release.
- 4.) Enter the **Phase/Release** number (or letter if appropriate), the **phase / release** date, and any additional comments:

The screenshot shows a dialog box titled 'Phase Record'. It has two buttons at the top: 'Save' and 'Cancel'. Below the buttons are three input fields:

- Phase: 1B
- Phase Date: 01/01/2003
- Comment: Green belt lots

- 4.) Click **Save**.

## Maintaining SQLSalesBuilder-Specific Lot Information

Once **Plans** and **Phases/Releases** have been established, you're able to start creating individual lot records. **SQLSalesBuilder** utilizes lot information to present information to prospects and as the basis for a homebuyer's purchase agreement. This set of data must be kept up-to-date – either at the corporate/division office or by your sales agents. To access this information:

- 1.) Expand the Lots menu node. Make sure you're in the appropriate community.
- 2.) Click on Add New Lot :



Lot:                      Address:

Details    Miscellaneous

Save    Delete    Copy

Lot Number	Block	Phase	Effective
<input type="text"/>	<input type="text"/>	<input type="text"/>	11
Street Address			
<input type="text"/>			
Plan	Elevation	Base Price	Premium
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Garage	Standard./Reverse	Picture	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Description			
<input type="text"/>			

**Details & Miscellaneous**

All the information you need to input is available on the Details tab:

- **Lot Number** (aka “Job”) – Mandatory; a unique lot number must be input.
- **Block** – Optional; some builders (and some localities) utilize a Block number as another lot identifier (such as Lot 2/Block 3); input if utilized (free form entry permitted).
- **Phase/Release** – Optional; make a drop down selection from choices previously established (see above for details on how to setup).
- **Effective** – Optional; used for reporting purposes to designate when the availability/pricing for this lot becomes effective.
- **Street Address** – Optional (but recommended); the lot’s address (city, state, zip are not required; they have been setup in Community Configuration); used in preparation of sales agreement documents.
- **Plan** – Mandatory; typically, builders either “pre-plot” lots with specific plans or allow buyers to select a plan for their desired lot. If you “pre-plot”, select a **Plan** from the drop down list (you’ve previously established your **Plan** list above). If buyer selections are allowed, simply leave the **Plan** blank.
- **Elevation** – Optional; if you’ve pre-plotted a **Plan** and wish to designate an **Elevation**, select from the drop down list (you’ve previously setup your **Elevation** list above).
- **Base Price** – Mandatory; if you’ve selected a **Plan**, the **Base Price** will automatically be input. If **Plan** is determined by the buyer, **Base Price** is \$0. If you wish to establish **Base Price** on a lot basis, you may overwrite the established Base Price with a new amount. 🎵 Generally, we recommend using **Lot Premium** as a way to adjust the **Base Price**.
- **Premium** – Optional; this field is used to add an additional amount to the **Base Price**; builders utilize different terms including lot premium, view premium, elevation premium, etc..
- **Garage** – Optional; used to designate garage size (2-car; 3-car, etc); typically used for informational purposes during the sales presentation; however, many builders provide this information on sales agreement documents, as well.
- **Std/Reverse** – Optional; the “handing” of the home (as compared to the standard plotting); typically **S/R** or **L/R**.
- **Picture** – Optional; you’re able to associate a plot plan or elevation picture file with each lot for easy reference at the sales office. Provide the file name here; file location is established in **Community Configuration**.
- **Description** – Optional; a short description for use at the sales office (particularly useful when agents are selling prior to streets or cross selling when there isn’t easy access to the physical lot).

## Master Option List

The **Master Option List** is the largest list of data in **SQLSalesBuilder**. Because of size, management of this list is done through a special screen that allows you to input, sort, and search through options in a variety of different ways (for example, by **Category** or by **Plan**):

Option C...	Description	Buyer Cost	Location
Category : 1. FIREPLACES			
+ Plan :			
+ Plan : 02NE			
+ Plan : 04CH			
- Plan : 04NB			
0135-A	Fireplace-Brick to Mantle-Flush Hearth	4500	Family Rm
0135-B	Fireplace - Brick w/Morgan Mantle	5100	Family Rm
0135-C	Fireplace-Brick to Ceiling-Raised Hearth	5800	Family Rm
0135-F	Fireplace-Brick to Mantle-Raised Hearth	5100	Family Rm
0135-L	Fireplace-Stone to Mantle-Raised Hearth	7100	Family Rm
0135-M	Fireplace-Stone to Mantle-Flush Hearth	6500	Family Rm
0135-N	Fireplace-Stone to Ceiling-Raised Hearth	8100	Family Rm
1143-C	Fireplace - Gas Prefab Slate Face & Hearth	0	Family Rm
1143-F	Fireplace - Gas Prefab Marble Face & Hearth	900	Family Rm
+ Plan : 04OF			
+ Plan : 04SI			
+ Plan : 04WA			
+ Plan : 05BE			
+ Plan : 05BR			
+ Plan : 05HG			
+ Plan : 05ST			
+ Plan : 05VI			
+ Plan : 06BM			
+ Plan : 06JA			

- You're able to "group by" or "sort" by any individual column. To "group by" any column, drag the column heading up to the area above the list. To sort by a column, drag it down into the column area.
- Groups can be expanded or collapsed by clicking on the + or – symbol to the left of their descriptions.

### Adding Options

- 1.) Click the **New** button.
- 2.) Enter information regarding a specific option (we'll discuss the individual fields – some are required; others are optional). Remember: options can be common to all communities (or unique to one – or several); common to all plans (or specific to a plan by community). It is well worth your time to review your Option List to develop a thorough understanding of its relationships so you can quickly and accurately prepare your **SQLSalesBuilder Master Option List**.

- **Option Code** – Mandatory; must be unique. Can match your accounting codes.
- **Category** – Optional; allows you to “group” options for easy viewing by sales agents, prospects/buyers and Design Center staff. Categories are established by you (there aren’t any preset categories). However, once you start data input, you may choose a pre-existing category, or type in a new one. 🎵 **SQLSalesBuilder** automatically puts your input in order; first, numerically and second, alphabetically. Some builders have a “pre-set” style they would like their agents/designers to work through (for example: structural options, then appliances, then plumbing, etc.). You can strictly order your list by numbering them (as in the example). Otherwise, use categories such as appliance, electrical, plumbing, etc.
- **Color/Style group** – Optional; use of this field allows you to “manage” the color/style list by creating a series of pre-set choices (see Option Groups). Color/style groups do 2 things: (1) allow agents to pick from a list rather than typing in buyer selections and (2) reduce errors by controlling the responses. Thus, if your appliance color/style list is White/Black, Bisque – your agents won’t have to enter “beige” and won’t mistakenly take an order for “beige” either.
- **Description** – Mandatory; short text describing option. We suggest a relatively short description here as agents have a limited amount of “screen real estate” to show to prospects/buyers. If more detail is useful, the **Details** area is available. “GE Microwave Oven” might be input as the description with “Model GE13929X; 1500 watt; self-cleaning” as further details.

- **Plan Name** – Optional; if blank, the option is available for all plans within the specified community. Otherwise, specify the Plan Name to restrict its selection. **Be careful** to type in the **Plan Name** exactly as it is typed in the plan setup (see above re: **Plans** for more information about plan names)
- **Room** – Optional; you may pre-designate the appropriate room location. This is particularly useful as a means of reducing agent input (and possible error). You're able, for example, to preset Bath 2 hardware for \$450 and Bath 3 hardware for \$375.
- **Buyer Cost** – Mandatory; amount to be displayed for buyer to review and include in their purchase agreement.
- **Builder Cost** – Optional; for informational and reporting purposes.
- **Insert after** – Optional; used with CPS' **SQLScheduleBuilder** application. This field describes the task code after which you would like the current option entered into the **SQLScheduleBuilder** schedule. Use only if the option must show up on the construction schedule as a task.
- **Days added to schedule** – Optional; used with CPS' **SQLScheduleBuilder** application. This field defines the number of days this option will add to construction schedule if selected. Use only if the installation of this option will affect the **SQLScheduleBuilder** construction schedule.
- **Duration** – Optional; used with CPS' **SQLScheduleBuilder** application. This field defines the amount of time needed to include in the schedule in days. Use for informational and contractor performance tracking. Use only if using 'Insert After' field.
- **Cut Off** – Optional; can be used with ScheduleBuilder or separately. Stage of construction after which option cannot be chosen. Very effective if your organization is able to keep the stage of construction current as it can prevent orders after the stage has passed. See your CPS Rep for additional information.
- **Details** – Optional; provides for additional descriptive details.
- **Select Projects Where Option is Available** – Mandatory; you must designate which communities will sell this option. You can select **All Projects**.
- **Cash Only** – Optional; designates if option **must** be paid for in cash (i.e., cannot be financed and included in total cost).
- **Design Center** – Optional; check if option will be selected at Design Center (otherwise option will be available for selection at sales office). Some builders clearly identify the location at which the option must be ordered (although it can be viewed at any location).
- **Auto Show Detail** – Optional; determines whether detail for option automatically displays in lists.

- **Color Required** – Optional; determines whether color (or style) **must** be specified for this option when selected. As long as a color isn't selected, the option will display with a # (pound sign) next to it on all forms as a reminder.
- **Allow Multiple** – Optional; indicates whether multiples of the option can be selected.
- **Structural** – Optional; provides a “common” indicator for structural options; useful for sorting and reporting purposes.

3.) Click **Save**.

#### Copying Options

- 1.) **Double-Click** the option you wish to copy in the list.
- 2.) Click the **Copy** button at the top of the Master Option Record window.
- 3.) Make any desired adjustments to the option.
- 4.) Click **Save**.

#### Deleting Options

- 1.) Select the option you wish to delete.
- 2.) Click the **Remove** button.
- 3.) Choose **Yes** from the dialog box asking you to confirm.

## Option Groups

**Option Groups** are the colors or styles which are preset for a specific option, e.g., you may create an “Appliance” group that identifies the colors available for all of your appliance options/upgrades . Using groups allows the corporate/division office to establish a list of choices so that the agent selects between “black/white/bisque” rather than typing “almond.”. Using groups can be both a timesavings and an effective control mechanism; however, it does require that the colors are kept up-to-date. To add a new **Option Group**:

- 1.) Expand the **Administration** menu node.
- 2.) Click on **Option Groups**. You will be presented with the following screen:

Group	Item
Brick Colors	Memo
Carpet Upg A	Memo
Carpet Upg B	Memo
Carpet Upg C	Memo
Carpet Upg D	Memo
Flat Panel Colors	Memo
Raised Maple/Cherry	Memo
Raised Panel Colors	Memo
Std Appliance	Memo
Std Bath Countertop	Memo

3.) The illustration has a number of **Option Groups** established. Click the **New** button and provide the **Option Group** title (Vinyl Upgrade #3, for example). Then, input the choices for this group. .

The screenshot shows a dialog box titled "Add/Edit Option Group Record". At the top, there are "Save" and "Cancel" buttons. Below them, the "Option Group:" field contains the text "Vinyl #3". The "Color/Style:" field is a list box containing the following items: "Milestone #2356 Sunset", "Milestone #2390 Moonglow", "Milestone #4592 Marimba", "Milestone #4693 Greystone", and "Milestone #4781 Concentrid". At the bottom, there is a "Form ID:" label followed by an empty text input field.

🎵 **Option Groups** provide only the details associated with a unique option. You must create the Option, itself, in the **Master Option List**. That is, at some point (it can be before or after creating the **Option Group**), you must create an option record for “Vinyl Upgrade #3” and associate the color choices with it.



## Scheduling and Customer-Service Setup and Maintenance

*Jobs/Lots are one of the many pieces of common information among CPS Enterprise applications. Lot Maintenance (as it relates to SQLSalesBuilder) was discussed in Chapter 3 in the “Maintaining SalesBuilder-Specific Lot Information” section. This section focuses on Job information common to both SQLScheduleBuilder and SQLWarrantyWatcher. In addition, we review setting-up Trades and Contractors.*

### Jobs

**Jobs/Lots** (many builders use one term or another; some use both terms interchangeably; **CPS Enterprise** uses the term **Job**) are the part of **CPS Enterprise** where detailed information is contained, such as scheduling items and service apps. **Jobs** also have other properties, such as Address, Phase, Service Rep, Walk Dates, Buyer(s), etc.

If you are a **SQLScheduleBuilder** user, you may create much of the **Job** information for the **SQLSalesBuilder** application. However, if you are a **SQLWarrantyWatcher** user, the **Job** information could originate from either **SQLSalesBuilder** or **SQLScheduleBuilder**. In the event only a single application is being used, the **Job** information will need to be created within that application.:

- 1.) Expand the **Jobs** menu node.
- 2.) Click on the **Job** you wish to view or modify:



or click on the **Add New Job** selection to create a new **Job**.

- 3.) Click on the **Details** tab to view information pertaining to the **Job**. All of the data input items are mandatory – with the exception of **Block**; however, you may not have access to all of the information initially. If you need to setup **Plan/Release/Phase** data, please review **Chapter 3** in detail.

**SQLScheduleBuilder** and **SQLWarrantyWatcher** utilize preset, drop down lists to maintain data integrity through the application.

Job Number 01	Block 	Phase Phase 1
Release 1		
Street Address 1234 Oak Avenue		
Plan Plan B	Elevation A	
Permit Number 889939	Permit Date 01/01/2002	

- Once the lot is sold, you may input Buyer-related information so that your field personnel and reports have access. If you are a **SQLSalesBuilder** user, this information is completed automatically. Click on the **Buyers** tab to add or view information about the buyers for the lot:

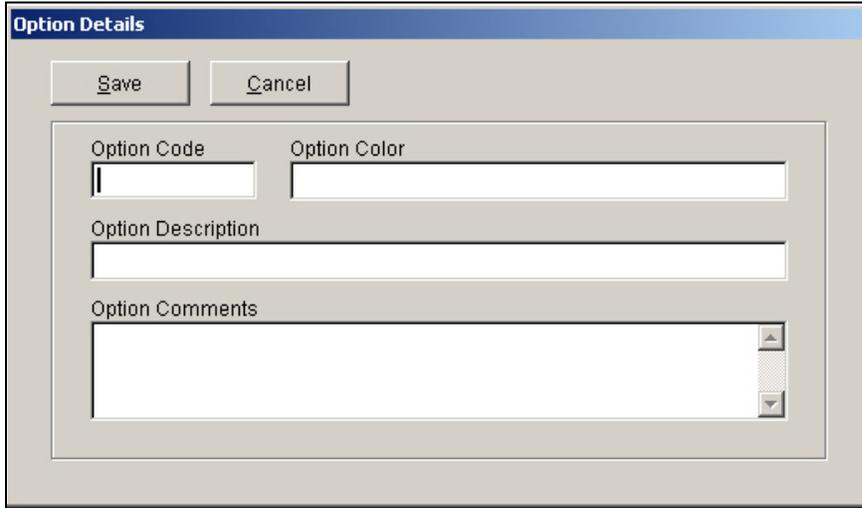
First Name 1 Joe and Mary	Last Name 1 McSmith	First Name 2 	Last Name 2 
Address (Line 1) 25232 Bayview Cr		Home Phone (916) 555-3487	
Address (Line 2) 		Work Phone 1 (916) 555-8734	Work Phone 2 (916) 555-7834
City Los Angeles	State CA	Zip 95555	Email 
Close Date 10/02/2000			

### Adding or Changing Options/Upgrades

Options/Upgrades are a feature of **CPS Enterprise** best managed from within **SalesBuilder**. However, for those who do not use **SalesBuilder** at their company, a limited amount of option maintenance functionality is included in **WarrantyWatcher**. To add new options to a lot:

- Expand the **Jobs** menu node.
- Click on the **Lot** you wish to modify or view.

- 3.) Click on the **Options** tab.
- 4.) Click the **New** button below the option list.
- 5.) Enter **Option Code**, **Color**, **Description**, and any notes if necessary:



The image shows a dialog box titled "Option Details". At the top, there are two buttons: "Save" and "Cancel". Below the buttons, there are four input fields: "Option Code" (a small text box), "Option Color" (a larger text box), "Option Description" (a text box with a vertical scrollbar), and "Option Comments" (a larger text box with vertical scrollbars).

- 6.) Click **Save**.

You can change the options you have entered at any time in the future by double clicking on the option from the list and changing it's details.

## Adding Trades

It's important to set up your **Trades** at this point, so that you can begin adding your organization's contractors (**CPS Enterprise** uses the term "contractors" throughout; some builders refer to their vendors as "subcontractors" or "vendors").

- 1.) Expand the **Company Administration** menu.
- 2.) Click on the **Trade List** menu item.



3.) On the right pane, click the **New** button.

Trade List	
Company: American HomeBuilder, Inc.	
Trade Description	Code
Alarm/Pre-Wire	10
Appliances	1
Assistant Superintendent	55
Cabinets	2
Carpet Restoration	44
Concrete	12
Cultured Marble	42
Drywall	14

4.) Enter the **Description** and **Trade Code** and click **Save**. The **Trade Code** is used for reporting purposes; many builders utilize abbreviations but you may use any alpha/numeric combination.

**Trade Record**

Save    Cancel

**Trade**

Description:

Trade Code:

## Contractors

Once you have established your **Trades**, you’re ready to input your **Contractors**. At this point, both the **Trades and Contractors** are “common” to your organization – they’ll be assigned to **Communities** later in the process. **Contractors** (CPS Enterprise uses the term “contractors”; some builders use the terms “subcontractors” or “vendors” interchangeably) are stored in one master company-wide list. This list is located under the **Contacts / Users** section. A **Contractor** is assigned to a specific trade (or multiple trades) and, then, the **Contractor** is designated to perform work in one or more communities.

The **Trade** designation is set from within the **Contractor** form. The **Community** assignment is set in the **Contractor Assignment** menu item in the **Community Administration** menu node. Only after these designations have been established can the contractor be assigned to any construction or warranty tasks.

### Adding Contractors to the Company list

1.) Expand the **Contacts / Users** menu node.

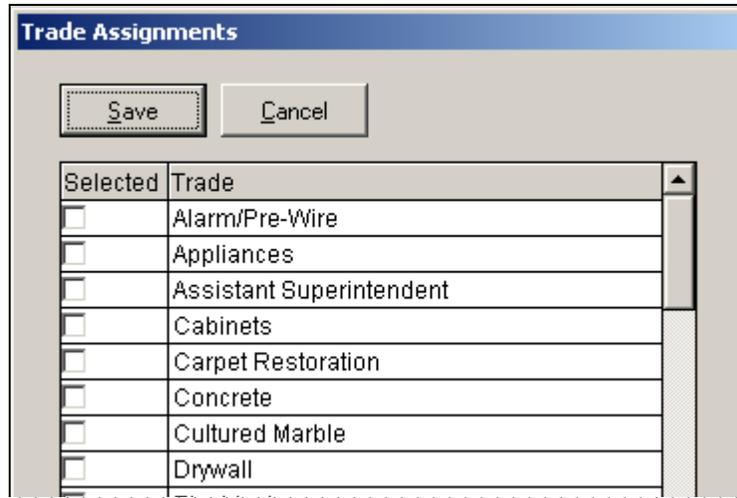


- 2.) Click on the **Contractors** menu item.
- 3.) Click on the **New** button.

The screenshot shows a 'Contractors' form with the following fields and values:
 

- Save** and **Cancel** buttons at the top.
- Company:** Swenson's Appliances, #: 432
- Trade:** Appliances (dropdown), Daily Work Hours: 8.00
- Office Phone #:** 916-777-4455, **Fax #:** 916-777-5544
- Name - First:** Jack, **Last:** Swenson
- Job Title:** Owner
- Home #:** 466-6644, **Mobile #:** 665-5454
- Email:** jswenson@earthlink.com
- Send To:**  Email,  Fax
- Address:** 4678 Madison Ave., #300
- City, ST Zip:** Fair Oaks, CA, 96372
- Contact ID:** 0

- 4.) Enter the **Contractor** company information. Designate the trade(s) by pressing the dropdown near the **Trades:** prompt to obtain the list of existing **Trades**. 🎵 A contractor can perform multiple tasks and be assigned multiple **Trades**.



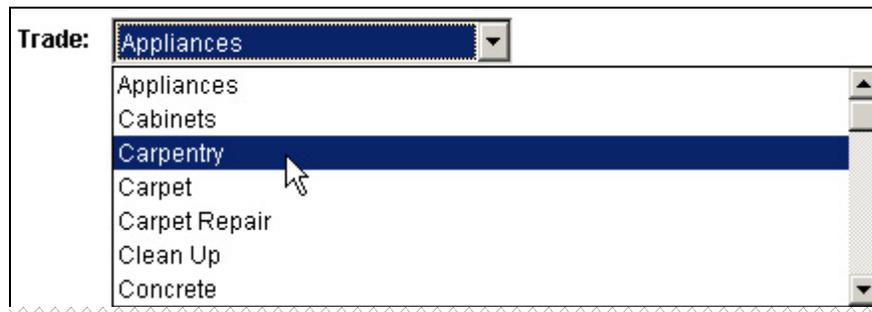
- 5.) Indicate the contractor’s primary preferred method of receiving assigned work reports by checking the **Email** or **Fax** checkboxes and filling in the required email/fax information. This is extremely important as you will want to “automatically” notify them via this preferred method.
- 6.) Click the **Save** button.

## Assigning Contractors

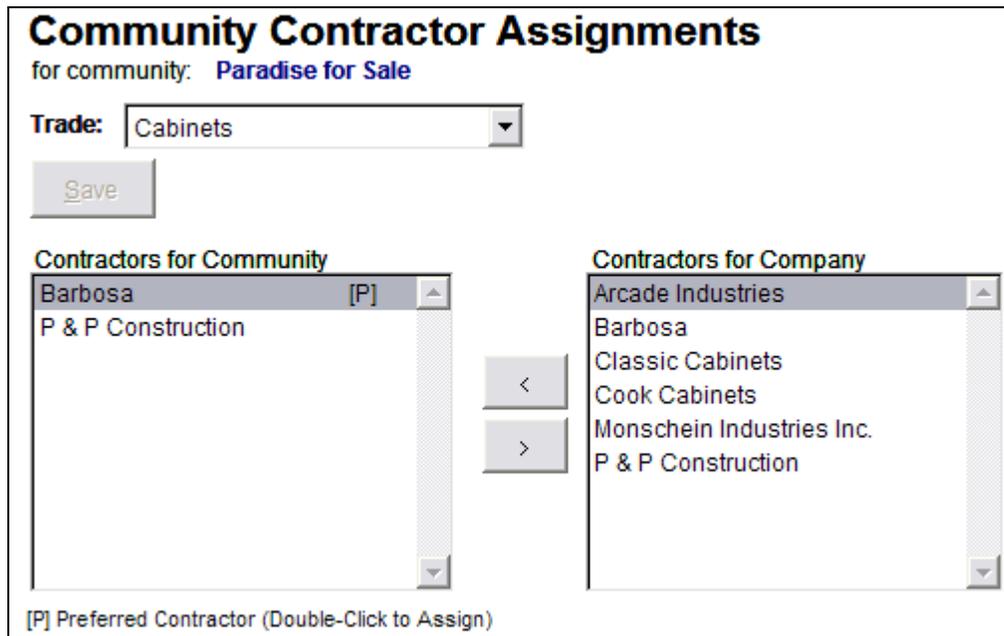
- 1.) Select the **Community** you wish to assign contractors to (see **Changing Communities** section in Chapter 2).
- 2.) Expand the **Community Administration** menu node.
- 3.) Click on the **Contractor Assignment** menu item.



- 4.) Choose the type of **Contractor** you wish to assign to your **Community** from the **Trade** list (contractors will appear in this list once they are added to the company list and assigned a trade) :



- 5.) Select the name of the **Contractor** from the master list on the right that you wish to assign to a **Community**. More than one contractor per trade may be designated to a community. Only one contractor can be marked as the current “preferred” contractor. Both **SQLScheduleBuilder** and **SQLWarrantyWatcher** have some automatic contractor assignment features that will use this “Preferred Contractor” information. As the screen indicates double-click on the desired contractor to mark them as the “preferred” or “default” contractor.



- 6.) Click the **<** button to move the **Contractor** to the **Community** column.
- 7.) Click the **Save** button.

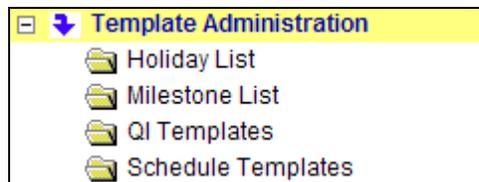
## Construction Management

*Construction Management is the primary objective of the **SQLScheduleBuilder** application.*

Previously, we have reviewed **Setup and Configuration** (see **Chapter 2**) as well as **Scheduling Setup and Configuration** (**Chapter 4**). Once you have this data established, you're ready to create the foundations -- the **Templates** -- upon which all future work schedules will be built.

### Template Administration Overview

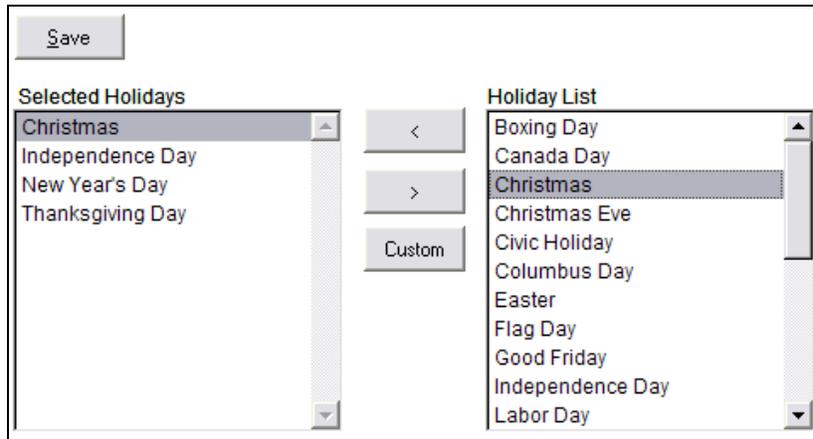
**CPS Enterprise** utilizes **Templates** to create schedules, establish holidays, etc. The **Template Administration** menu node consists of four possible selections:



Expanding the **Template Administration** menu node reveal these choices.

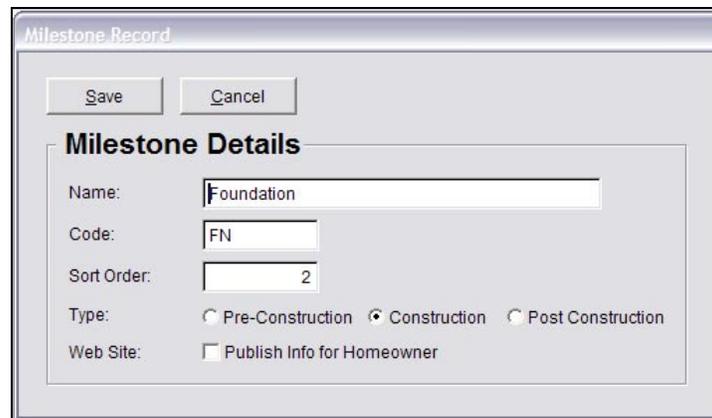
#### **Holiday List**

The **Holiday List** allows you to identify which of the major holidays should typically NOT be included as a work day when creating or recalculating construction schedules. 🎵 Manual overrides can supersede this function if needed. A master list of major holidays is provided. Additionally, you may add your own “custom” holidays such as your company’s “Founders Day” (should you elect to exclude that day from construction schedules). To indicate which holidays to be included for your company select the holiday from the **Holiday List** box and press the < button. To add a custom holiday click the **Custom** button, complete the form and press **Save**.



**Milestone List**

**Milestones** are often equated to the term “stages of construction”. All your schedule templates and actual job schedules will be bound by these construction **Milestones**. Each task within a schedule will be assigned to “belong” to a **Milestone**. Again, within **Template Administration**, click the **New** button to add a new **Milestone**. Click the **Remove** button to remove a **Milestone**. **Double Click** an existing milestone to edit the record.

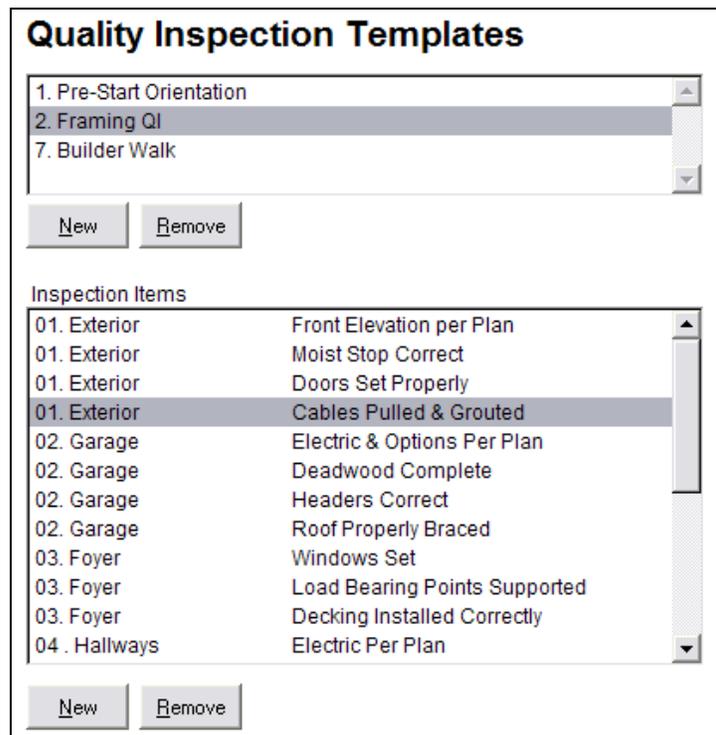


A **milestone** consists of a

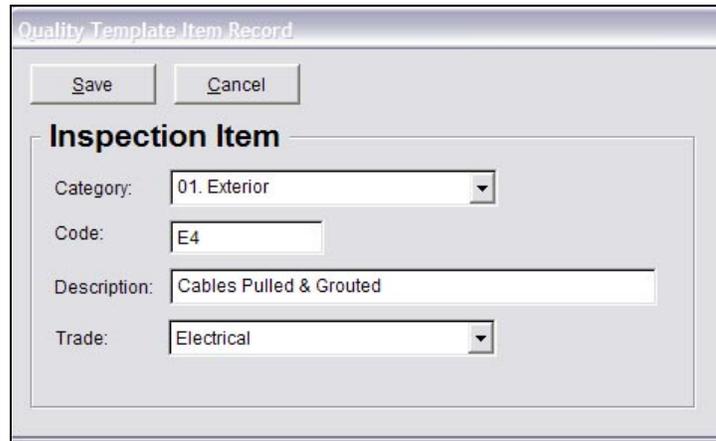
- **Name** – Mandatory; a descriptive term which will be used on most reports, lists, etc.
- **Code** – Mandatory; typically an accounting code which may be used in some screens as an abbreviated representation of the milestone.
- **Sort Order** – Mandatory; determines which order the milestones will be listed.
- **Type** – Optional; will be used as a future reporting option that would allow you to include or omit tasks from each of the three possible types.
- **Publish Info for Homeowner** - Optional; will be used by a future web-based application designed to allow a homeowner to view the construction progress of their home on the internet.

**Quality Inspection Templates**

**Quality Inspections** can be added to any/all jobs. Unlike the actual construction schedule, a single job can have as many quality inspections as is needed. You may want to create several inspection points during the course of construction.



Click the **New** button under the **Quality Inspection Templates** list to add a new inspection template. Press the **Remove** button to remove an **Inspection Template**. **Doubleclick** an **Inspection Template** to edit the record. The **Inspection Template** record consists of no more than a descriptive name and optional comments. After creating the **Inspection Template** record you may now add the list of items to be inspected.



The image shows a dialog box titled "Quality Template Item Record". At the top, there are "Save" and "Cancel" buttons. Below them is a section titled "Inspection Item" containing four fields: "Category" with a dropdown menu showing "01. Exterior", "Code" with a text box containing "E4", "Description" with a text box containing "Cables Pulled & Grouted", and "Trade" with a dropdown menu showing "Electrical".

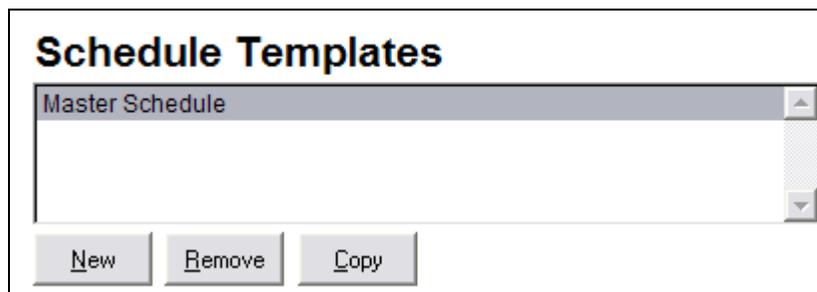
Click the New button under the Inspection Items list box. Each inspection item must be assigned:

- **Category** – Mandatory; all inspection items are sorted and grouped by this category.
- **Code** – Mandatory; you can utilize any coding method you wish.
- **Description** – Mandatory; detailed itemization of the item to be inspected.
- **Trade** – Optional; a designation can be equated with the item in the event a future “Punch” task or Work Order will be created as a result of this inspection item.

## Schedule Templates

**Schedule Templates** are the last item in the **Template Administration** section but they are certainly not the least. These **Templates** have many more elements to them than the previously described items in this section and they act as the foundation for all future construction schedules.

To create a new **Schedule Template** click the **New** button. To remove a template **click Remove**. *It is highly recommended that a “Master” Schedule Template is created first and all subsequent templates can be created by copying from that master record.* There is no limit to the number of **Schedule Templates** that can be created. To create a new **Schedule Template** by copying another - select the desired **Template** and click the **Copy** button.



The image shows a dialog box titled "Schedule Templates". It features a list box containing one item, "Master Schedule". Below the list box are three buttons: "New", "Remove", and "Copy".

Doubleclick a **Template** to edit an existing **Template** record. The **Schedule Template** record merely acts as the “parent” to a series of “child” tasks. The **Schedule Template** record consists of a descriptive **Name** and a default **work week** designation.

After creating the parent schedule template record, add all the tasks that will belong to that template. Click the **New** button under the **Tasks** list box to create new tasks. Click the **Remove** button to remove a task.

<b>Tasks</b>			
MS Code	Wk Day	Code	Task
Pre-FN	-1	0005	Obtain Permit
Pre-FN	1	0010	Set Forms
Pre-FN	2	0020	Dig Plumbing
Pre-FN	2	0030	Manufacturing Walls
Pre-FN	2	0040	Manufacturing Trusses
Pre-FN	3	0050	Rough Plumbing
Pre-FN	4	0060	Inspect Plumbing
Pre-FN	5	0070	Grade Slab
Pre-FN	5	0080	Poly & Cables
FN	5	0090	Float In
FN	6	0100	Inspect Slab

Double-Click a task to edit the record. Building a complete schedule template requires a basic understanding of each element of the template task record:

## Schedule Template Task Elements

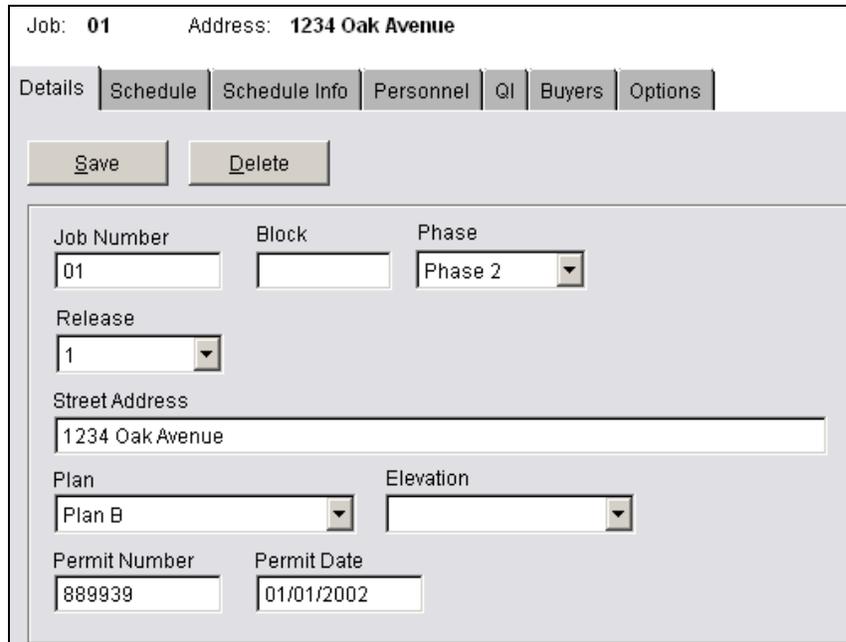
- **Milestone** – Mandatory; this is the stage of construction to which this task belongs (see previous discussion of **milestones**).
- **Task Code** – Mandatory; every task within a template must have a unique code. Many companies already have existing task codes that can be utilized. Often, these codes are related to internal accounting codes. If you do not have a pre-existing coding scheme, simply use a self-defined numeric scheme (“0010”, “0020”, etc.) as shown in the sample “Example - Full” schedule. Both alpha and numeric characters are accepted. *Please note: The code does not denote the sorting order.*
- **Task** – Mandatory; task or activity description.
- **Work Day** – Mandatory; **the field by which the schedule is sorted**. It is used to identify the workday the task should be performed. When calculating the workday, do not include typical non-workdays in the equation. For example, if your workweek does not include weekends, and you want a task to be scheduled at the beginning of the third week, assign it to the 11th workday – not the 15<sup>th</sup>.
- **Duration** – Mandatory; defines the number of days scheduled to complete the task. Most tasks in a production homebuilder construction schedule are one day duration. Every task has a minimum of one day duration with no maximum.
- **Anticipated Time** – Optional; used to determine resource utilization. Time should be expressed in minutes.

- **Trade** – Mandatory; e.g., Plumbing, Electrical, etc. When the actual job construction schedule is created the “Preferred” contractor assigned for that trade in the job’s community will automatically be assigned to the task.
-  **Super #** – Optional; used by CPS’ **WalkWrite** application. Tasks can be assigned “front end” or “back end” field representatives depending upon that builder’s practices (see upcoming section on Creating Job Schedules)
- **Skip Lock** - Optional; indicates this task is to be “skipped over” when a schedule recalculation is performed. Generally, “skip lock” tasks are non-construction tasks, e.g., ordering materials or permits.
- **Budget Cost** – Optional; reserved for future use with job costing and variance reports.
- **Cost Only** – Optional; for future use with job costing and variance reports.

## Creating Job Schedules

Once you have created at least one **Schedule Template**, you are able to create a specific **Job’s Schedule**. To create a construction schedule for a job:

- 1.) Expand the **Jobs** menu node.
- 2.) Click on the **Job** you wish to modify or view.



Job: **01**      Address: **1234 Oak Avenue**

Details | **Schedule** | Schedule Info | Personnel | QI | Buyers | Options

Save      Delete

Job Number: 01      Block:      Phase: Phase 2

Release: 1

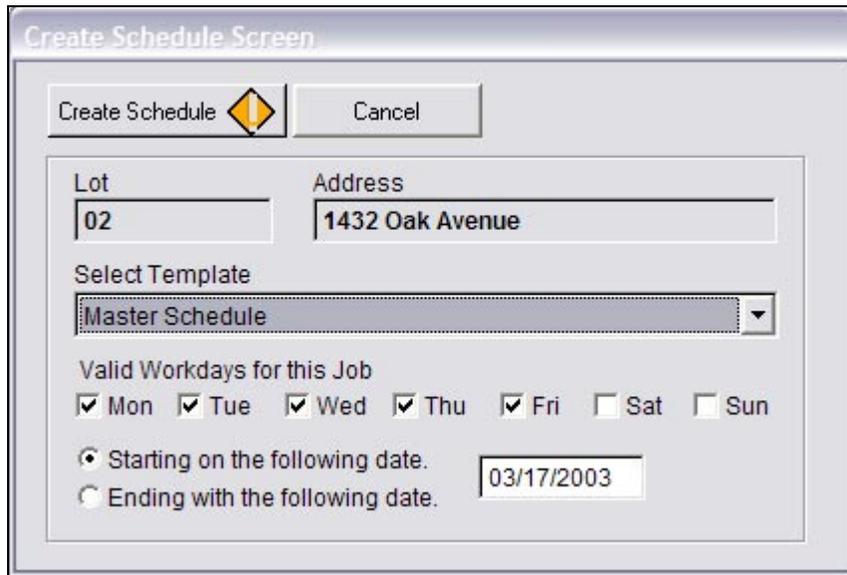
Street Address: 1234 Oak Avenue

Plan: Plan B      Elevation:

Permit Number: 889939      Permit Date: 01/01/2002

- 3.) Click on the **Schedule** tab.

4.) Click the **Create Schedule** button below the empty task list



Select the appropriate **Schedule Template**, verify the **default work week**, establish either the **Schedule Start Date** or the **Schedule End Date** and press the **Create Schedule** button.

The **Schedule** will be created according to the design of the **Template** respecting both the **default work week** and any **Holidays** that fall within that time period.

Milestone										
	Code	Task	WD	Scheduled	...	Started	...	Completed	...	Approved
- Milestone : [ 1 ] Pre Foundation										
▶	0005	Obtain Permit	...	-1	3/17/2003					
	0010	Set Forms	...	1	3/18/2003					
	0020	Dig Plumbing	...	2	3/19/2003					

Next, click on the **Personnel** tab to assign the appropriate company personnel to this job. The **Managing Representative** designates the primary field representative responsible for that job. The **Managing Representative** will be listed in many reports and is often used as a report filter option.



### WalkWrite Designations

The four additional **Field Representative** assignments are strictly for use with the **WalkWrite** application. Up to four field representatives may be assigned to view job schedule information in **WalkWrite**. The **Do NOT Display this Job on PDAs** checkbox will omit the Job from being included with the WalkWrite application.

There are two paths to providing task information to multiple field representatives. Located in the **Company Info and Preferences** is the preference item called **All Field Reps Receive All Tasks**. If the response to this item is “Yes” then all personnel assigned to these positions will receive the same schedule information. If the response is “No” then the builder manages jobs through a team of field representatives who are responsible for specific phases of construction. Often the term “front-end/back-end” is associated with this practice. **SQLScheduleBuilder/WalkWrite** supports up to four phases (four personnel assignments). In this model a field representative will only receive tasks that are assigned to his field representative number. The tasks were designated to these positions in the **Schedule Template** under the **Super #** field of each task.

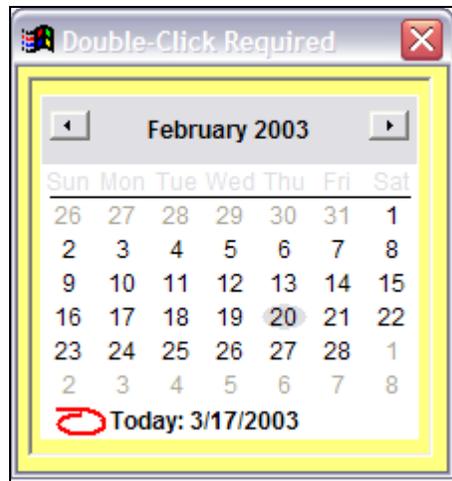
## Maintaining Job Schedules

Viewing the schedule is available by clicking on the **Schedule** tab on the **Job** screen. This method makes the viewing of tasks on a job by job basis very easy. The alternative to viewing these tasks by job is by **Contractor**. That option is described in the next section.

**Maintaining the Schedule** can be as straightforward as inputting the actual start, complete and approved dates for each task. This can be accomplished by clicking on the checkbox next the desired date field; today’s date will automatically be assigned as the value. If you mark the item as having been completed and the start date was not previously entered, then both the started and completed dates will be assigned. Likewise, if you mark the approved date when either the completed or both the started and completed dates were not entered then all three date fields will be assigned.

Milestone											
Code	Task	WD	Scheduled	...	Started	...	Completed	...	Approved	Contractor	
- Milestone : [ 1] Pre Foundation											
0005	Obtain Permit	...	-1	1/13/2003	<input checked="" type="checkbox"/>	1/17/2003	<input checked="" type="checkbox"/>	1/17/2003	<input checked="" type="checkbox"/>	2/11/2003	Saxon Alarm
0010	Set Forms	...	1	1/14/2003	<input checked="" type="checkbox"/>	1/23/2003	<input checked="" type="checkbox"/>	1/23/2003	<input checked="" type="checkbox"/>	2/11/2003	Lasater Bro
0020	Dig Plumbing	...	2	1/3/2003	<input checked="" type="checkbox"/>	2/11/2003	<input checked="" type="checkbox"/>	2/19/2003	<input checked="" type="checkbox"/>	2/19/2003	Universal
0030	Manufacturing Walls	...	2	1/15/2003	<input checked="" type="checkbox"/>	1/17/2003	<input checked="" type="checkbox"/>	1/23/2003	<input checked="" type="checkbox"/>	2/11/2003	Sacrament
0040	Manufacturing Trusses	...	2	1/16/2003	<input checked="" type="checkbox"/>	2/11/2003	<input checked="" type="checkbox"/>	2/20/2003	<input type="checkbox"/>		
0050	Rough Plumbing	...	3	1/16/2003	<input checked="" type="checkbox"/>	1/17/2003	<input type="checkbox"/>		<input type="checkbox"/>		Universal

To indicate a date other than today's date double-click the actual date cell and a calendar control will allow easy selection of any desired date.



Tasks listed in a **black** font are completed. A **green** font indicates tasks that are currently due. Tasks in **red** are past due. And, finally, tasks in a **blue** font are considered future work. To review or make any other changes to the task double-click the row in any non-date column. A form will present more detailed information about the task.

Task 0050 Rough Plumbing

Save Cancel

Milestone Assignment	Task Code	Dur	W.Day	Orig. Schedule
Pre Foundation	0050	1	3	01/16/2003

Trade Contractor

Concrete

Curr. Schedule	Date Confirmed	Started	Completed	Approved
01/16/2003	01/23/2003	01/17/2003		

Task Description

Rough Plumbing

Notes and Attachments

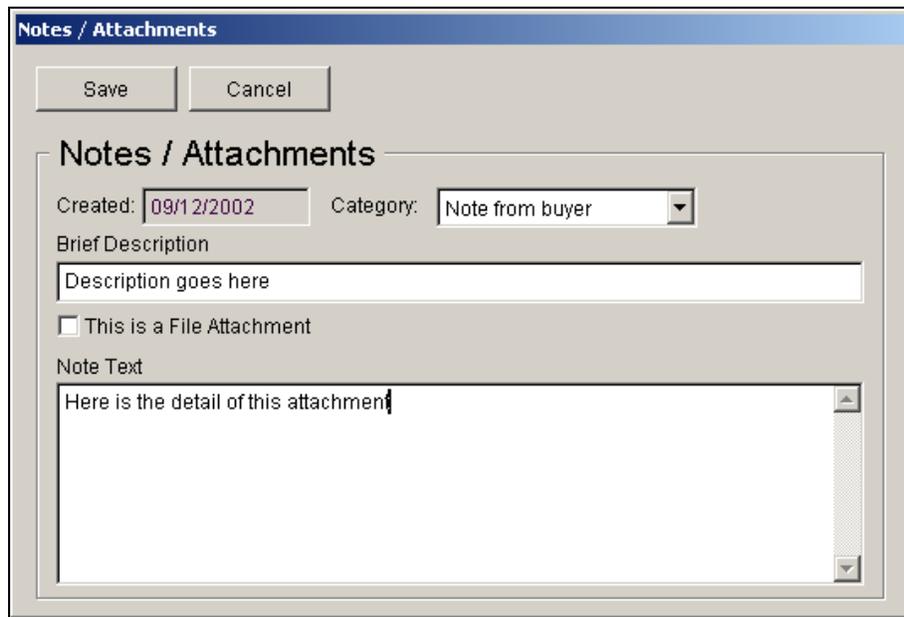
New Delete

Additional modifications can be made, from this form, such as the re-assignment of the trade and/or contractor and adding **Notes and Attachments**.

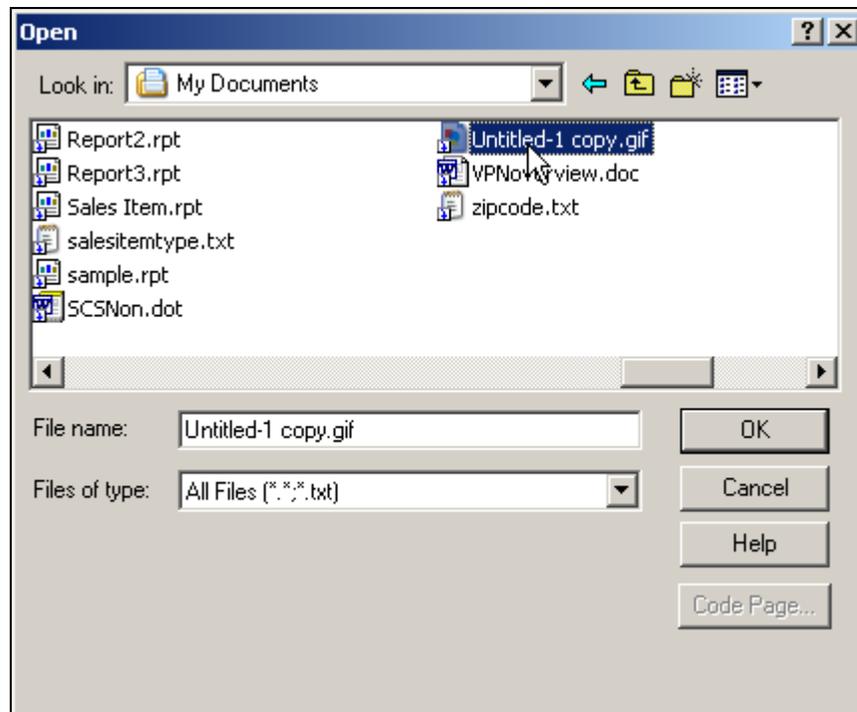
#### Notes and Attachments

**Notes and Attachments** are an easy way to store additional bits of information about a task. Additional instructions, comments from the field, pictures, and documents are examples. To add an **Attachment**:

- 1.) Click the **New** button, below the **Attachments** list.
- 2.) If the task is a new record that has not yet been saved, you will be prompted to do so:
- 3.) Enter a **Category**, **Description**, and any text you wish:



- a. You may alternatively attach a file instead of note text. To do this, click the **This is a File Attachment** check box then the *Assign/Locate File*  button.
- b. Choose the file you wish to attach:



- c. Click **OK**.

- 4.) Click **Save** to save the attachment.

**Delaying / Recalculating Job Schedules**

During the course of construction, many tasks may not be started and/or completed on their scheduled dates. Quite often, the small variances that occur do not affect the overall schedule. In these situations, indicate the actual start and completion dates leaving the scheduled date as is.

However, there will be occasions where the rescheduling of a task will be necessary. To reschedule a single task, **Double Click** on that task and type in a new **Curr. Scheduled** date (the original scheduled date is preserved in the **Orig. Scheduled** field).

Delaying a more critical task may affect the remaining schedule. If the balance of the schedule needs to be recalculated then:

- 1.) Click the **Recalculate** button below the schedule list. A list of all incomplete tasks will be displayed.

MS Code	Task	Scheduled	Confirmed
PI	Rough Plumbing	01/16/2003	01/23/2003
PI	Poly & Cables	01/20/2003	
PII	Float In	01/20/2003	
PII	Inspect Slab	01/21/2003	
PII	Pour Slab	01/22/2003	
PII	Grade Flatwork	01/23/2003	

- 2.) Select whether to **Advance Selected Tasks** (“move the schedule up”) or to **Delay Selected Tasks** (“push” the schedule out) and by how many work days.
- 3.) Identify the task causing the delay (the **Delay Task**) as well as the **Delay Reason**. The list of delay reasons are administered at the **Delay Reasons** menu item in the **Company Administration** menu node.
- 4.) Select/highlight the tasks needing to be rescheduled. This can be as straightforward as double-clicking the first task desired which will automatically highlight all tasks below that record. Alternatively, you can employ common controls of using the Shift and/or the Alt keys in coordination with your mouse to include/exclude any range of tasks desired. Only the selected/highlighted tasks will be recalculated.
- 5.) Finally, click the **Recalculate** button to commit the changes. The selected tasks will be recalculated and the screen will return to the standard schedule list.

### Viewing Tasks for Contractors

In addition to viewing tasks by **Job**, you may also view them by the **Contractor** they are assigned to. To do this:

- 1.) Expand the **Contractors w/ Tasks** menu node.
- 2.) Click on the **Contractor** you wish to view:



- 3.) Click on the **Schedule Tasks** tab on the right hand pane.
- 4.) You may edit and view details for any task in a similar manner as when viewing them by job.

## Work Orders and Service Applications

*Service apps are the primary container of work in SQLWarrantyWatcher.*

Now that your **Company, Division, Trades, Contractors, Communities, Plans, and Jobs** are set-up, it's time to begin the day-to-day operation of **SQLWarrantyWatcher**. The primary container of work in **SQLWarrantyWatcher** is the **Service Application**. The **Service Application** represents a group of issues a homeowner raises with the warranty department of your company.

Within every **Service Application** is one or more **service items**, called **work orders**. This is not to be confused with the actual Work Order sent to a contractor to initiate work. A **work order** is a single task or issue that a customer has reported. It may also be an issue discovered during a walk-through, or during the completion of another task. Each **work order** must be assigned to a particular **Contractor**. Once **work orders** are saved, they are sent to **Contractors** via an automated e-mail, fax, or mailing.

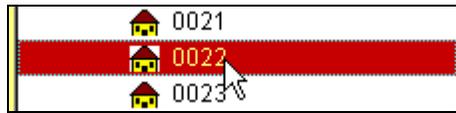
It's important to note the distinction between the **Service Application** and the **work order**. The **Service Application** is a container, whereas the **work order** contains the actual tasks themselves. For example: A homeowner on lot 31 has sent in a letter with 6 issues. The letter becomes a **Service Application**. The 6 issues become 6 **work orders** within that **Service Application**. **Contractors** will receive any work orders not resolved by your service reps.

### Entering Service Applications

Entering **Service Applications** is very similar to the input of much of the other information entered during setup. It consists of choosing a **Lot**, entering details about the **Service Application**, and clicking **Save**.

To add a **Service Application**:

- 1.) Expand the **Jobs** menu node.
- 2.) Click on the **Lot** you wish to enter a **Service Application** for:



- 3.) Click the **Service Apps / Work Orders** tab.
- 4.) Click the **New** button directly below the Service Application (top) list:

Service App #	# of Items	# Completed	Request Type	Date Entered
1047	8	8	Walk Through	07/31/2000
1218	3	3	Letter	05/18/2001
1254	4	4	Letter	07/03/2001
1418	1	0	Letter	08/04/2000

- 5.) Choose the source of the service app., a service representative, and notes if necessary:

**Service Application Information**

**Service Application**

Number: 
 Date Entered: 
 Source:

Service Representative:

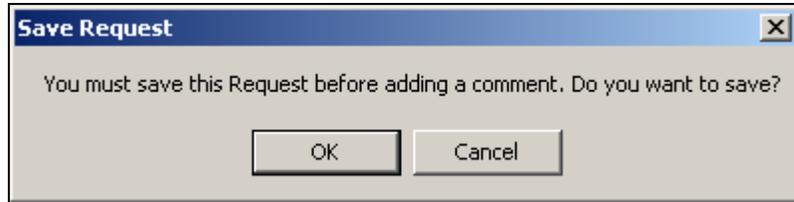
Associated Comments:

- 6.) Click the **Save** button.

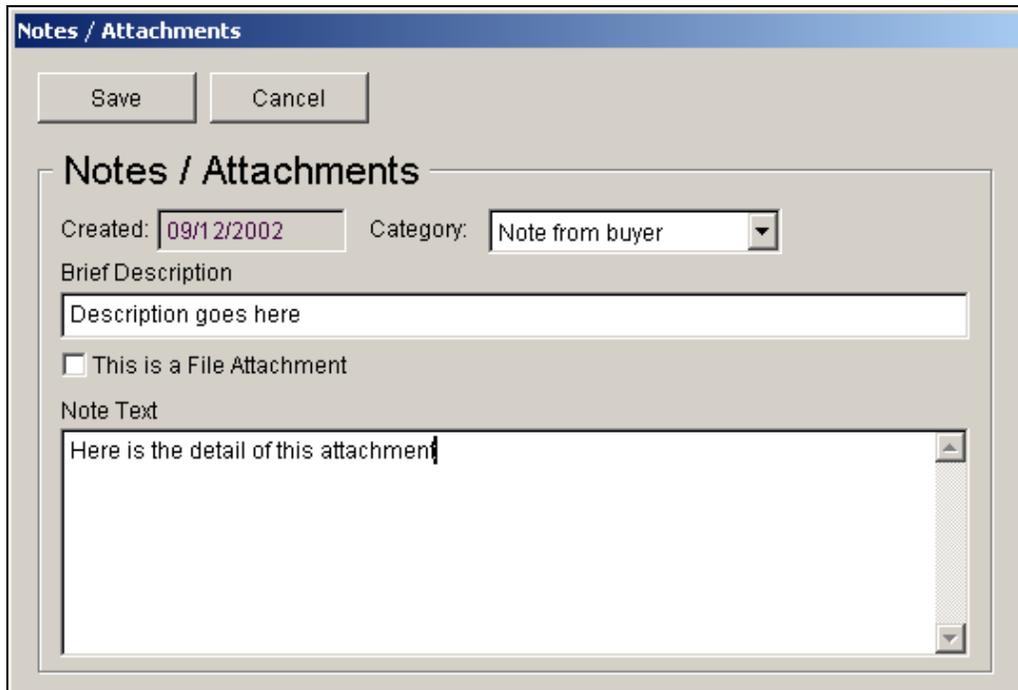
**Attachments**

Comment **Attachments** are an easy way to store additional bits of information about a **Service App** or **work order**. Such as comments pertaining to the task, pictures, or notes from a buyer. To add an **Attachment**:

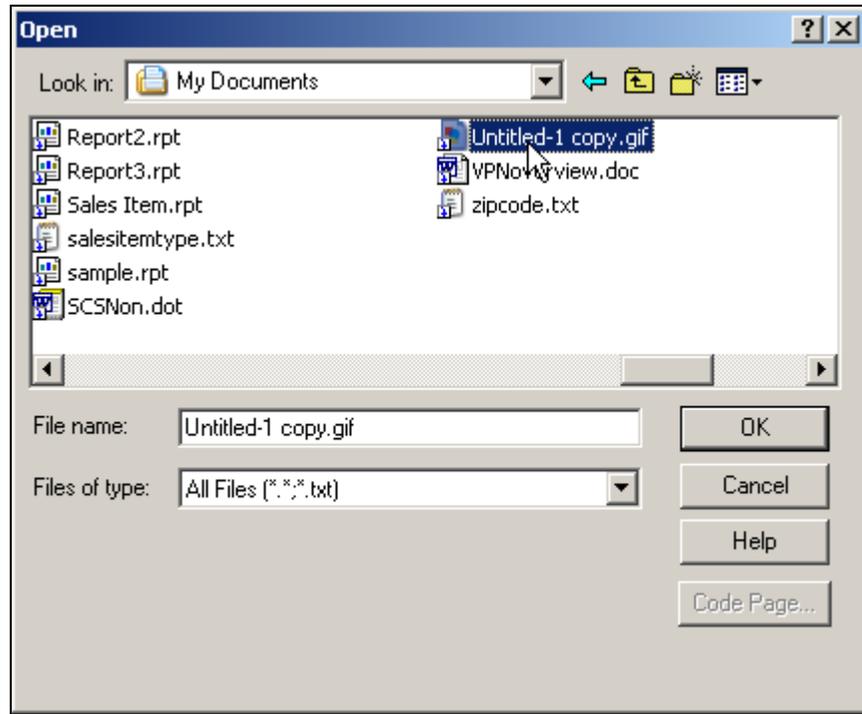
- 6.) Click the **New** button, below the attachments list.
- 7.) If the service app or work order has not yet been saved, you will be prompted to do so:



- 8.) Enter a **Category**, **Description**, and any **Text** you wish:



- a. You may alternatively attach a file instead of note text. To do this, click the **This is a File Attachment** check box then the *Assign/Locate File*  button.
- b. Choose the file you wish to attach:



c. Click **OK**.

9.) Click **Save** to save the attachment.

## Entering Work Orders

**Work Orders** are the meat and bones of the **Service App**. They represent each individual task or issue to be completed by an assigned **Contractor** before a **Service App** can be considered complete. Each **work order** has many options and properties that will be discussed throughout this section. Follow this step-by-step guide to understand each option.

- 1.) Expand the **Jobs** menu node.
- 2.) Click on the **Lot** you wish to add a **work order** for:



3.) Select the **Service App** you wish to enter a **work order** under:

Service App #	# of Items	# Completed	Request Type	Date Entered
1052	6	6	Walk Through	07/26/2000
1067	7	7	Letter	09/11/2000
1104	2	2	Letter	11/17/2000
1274	4	0	Other	04/08/2000

Click the **New** button below the lowermost list:

Service App #	# of Items	# Completed	Request Type	Date Entered
1052	6	6	Walk Through	07/26/2000
1067	7	7	Letter	09/11/2000
1104	2	2	Letter	11/17/2000
1274	4	0	Other	04/08/2000

Incomplete Work Orders Only

Work Order #	Close Date	Description
02200001	09/18/2000	Kitchen telephone does not work.
02200002	09/21/2000	Air vent in Master bath is bent.
02200003	09/18/2000	A gap appears in between floor and wall in kitchen corner.
02200004	09/22/2000	Screws missing in master bath shower stall.
02200005	12/06/2000	Two trees in the back have died.
02200006	12/06/2000	The ground in the backyard has been saturated and rearm
02200007	05/17/2001	SIGN-OFF

- 4.) You are now presented with the **work order** detail screen. Below is a brief description of the important fields on this form:

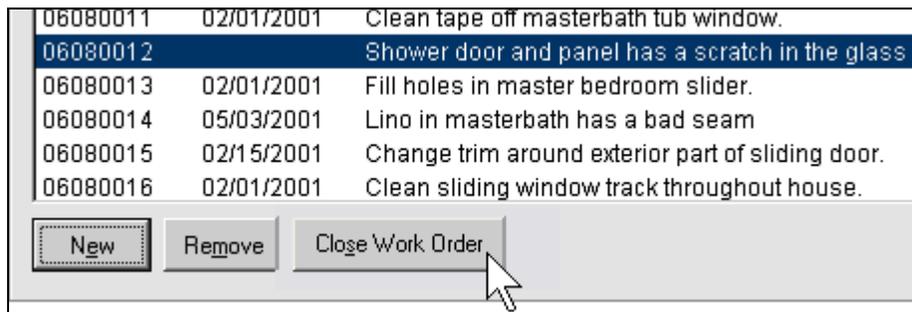
- **Work Order #** – Mandatory; an automatically generated auto-incrementing number designating the number of the work order.
- **Date Entered** – Mandatory; the date the work order was entered.
- **Date Scheduled** – Mandatory; the date the work order is schedule for completion
- **Time Scheduled** – Optional; the time the work order is scheduled for completion.
- **Time Req.** – Optional; estimated duration of labor for the work order.
- **Date Completed** – Mandatory; date of completion for the work order. This field should remain blank until the work order is closed (completed).
- **Work Order Type** – Mandatory; type of work order.
- **Best time to contact** – Optional; best time of the day to reach the customer.
- **Trade** – Mandatory; **Trade** type that the work order falls under. This option filters down the **Contractor** list to a specific **Trade** type. Be sure to select this item before attempting to choose the contractor. (See ‘Setting up Trades’ for information on how this list is made)

- **Contractor**– **Contractor** you wish to assign to this **work order**. Before choosing the **Contractor**, you must first choose a **Trade**. (See ‘Assigning Contractors to Communities’ for information on how this list is made)
- **Description of Work** – Comments pertaining to this **work order**.
- **Comments and Attachments** – Special notes that can contain text or files (see the **Attachments** section for more detail).

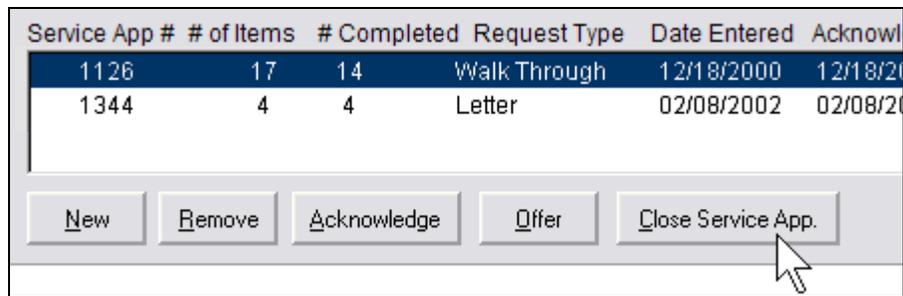
**Closing Work Orders for a Lot**

Once tasks are complete, they will need to be closed to indicate that they need no further attention.

- 1.) To close an individual **work order**, select the **work order** and click the **Close Work Order** button below the **work order** list:



- 2.) To close every **work order** in a **Service App.**, select the **Service App.** and click the **Close Service App** button below the **Service App.** list:



## Viewing Work Orders for Contractors

In addition to viewing **work orders** by **Service App.**, you may also view them by the **Contractor** they are assigned to. (Note: see “To do this:

- 5.) Expand the **Contractors w/ Tasks** menu node.
- 6.) Click on the **Contractor** you wish to view work orders for:



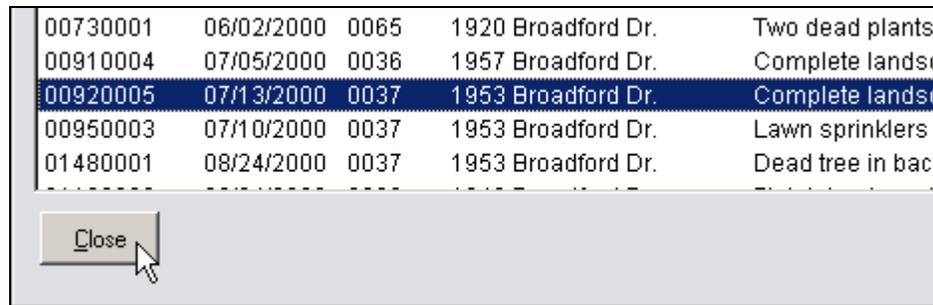
- 7.) Click on the **Work Orders** tab on the right hand pane.
- 8.) You may edit and view details for any **work order** by double clicking on it:

Work Order #	Close Date	Job	Address	Description
06340005	12/29/2000	0051	1893 Broadford Dr.	Landscaping.
07000008	02/26/2001	0008	992 Cameron Dr.	Complete landscaping.
08320009	03/22/2001	0008	992 Cameron Dr.	Need to finish landscape and timer.
06160004	02/01/2001	0009	988 Cameron Dr.	Finish landscape.
06600011	02/01/2001	0011	980 Cameron Dr.	Complete landscaping.
06300010	02/22/2001	0012	976 Cameron Dr.	Landscape needs to be completed.

**Closing Work Orders for a Contractor**

In addition to closing **work orders** on the **Lot Service App./work order** screen, you may also close them on the **Contractor work order** screen

- 1.) Select the work order and click the **Close** button:



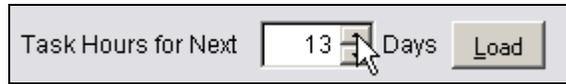
**Monitoring Resource Utilization**

**CPS Enterprise** has the ability to track the percentage of a day that a **Contractor** is being used based on the duration of the **work orders** assigned to them. This can be a helpful tool to use when determining what times of the month or year a **contractor** may be overburdened. To view the **Resource Utilization**:

- 1.) Expand the **Contractors w/ Tasks** menu node.
- 2.) Click on the **Contractor** you wish to view **Resource Utilization** for:



- 3.) Click on the **Resource Utilization** tab.
- 4.) Choose the number of days you wish to view utilization for from the number spinner:



- 5.) Click the **Load** button.

## Printing Reports

Report printing is one of the most important and powerful features of **CPS Enterprise**. Not only does **CPS Enterprise** provide a wide selection of day-to-day reports ranging from **Work Order** reports to **History** reports to **Lot** lists, it also provides several highly useful **Executive Drill-Down** reports. The executive reports provide an interactive, graphical way of displaying and analyzing data.

To print a report consists of several steps. First, the desired report must be selected from the list. Next, the parameters for the report must be selected from the parameter section. Then, the report can be generated.

This chapter assumes that you are logged in as a **SQLWarrantyWatcher** user with rights to access the community you wish to print reports for (see **Logging in as Company Administrator** for details). The actual reports list varies depending upon the application you are running.

### Setting Parameters

Parameters are what define what information the report should include, and how the report should be output. Many reports contain parameters such as division, job number, or a date range. To select a report and set the parameters:

- 1.) Expand the desired reports menu node (e.g. SQLWarrantyWatcher has both Reports- Executive and Reports - Operational).
- 2.) Click on the report you wish to print from the list.



- 3.) Select the parameter you wish to view or modify.

Report Options	Option Values
Print Preferences	Preview
Select Project	MyProj
Select Sort Order	Date Entered

Notice the pane below the parameter list change as you select different parameters. This is because different parameters have different choices, and different methods to specify them.



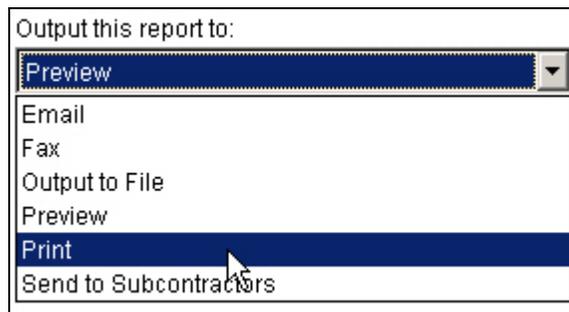
- 4.) To modify the parameter, make changes to the setting listed in the window below the parameter list. The setting is automatically saved as soon as you enter it. Almost all settings are remembered between sessions, so if you come back to the same report again later, it will remember your settings.

## Printing and exporting

You have a few options when it comes to the output of the report. You can, of course, print the report to your printer, but more interestingly, you can E-Mail, Fax, Preview, or Export the report to a file.

### Printing a report

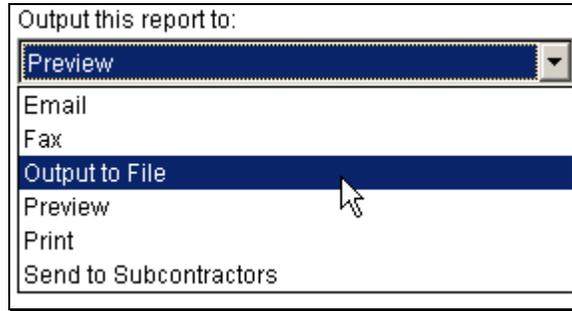
- 1.) After having selected the report and the necessary parameters for it, select the **Print** option for the **Print Preferences** parameter.



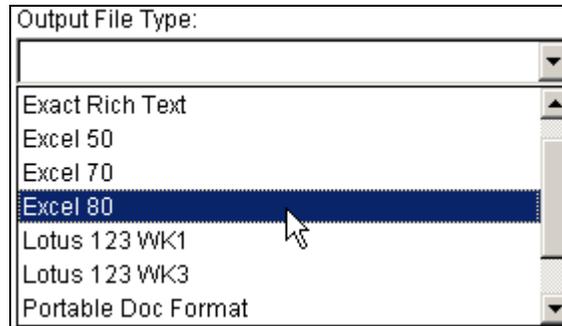
- 2.) Click the **Run Report** button.

### Exporting to file

- 1.) After having selected the report and the necessary parameters for it, select the **Output to File** option for the **Print Preferences** parameter.



2.) Choose the file type you wish to export as.

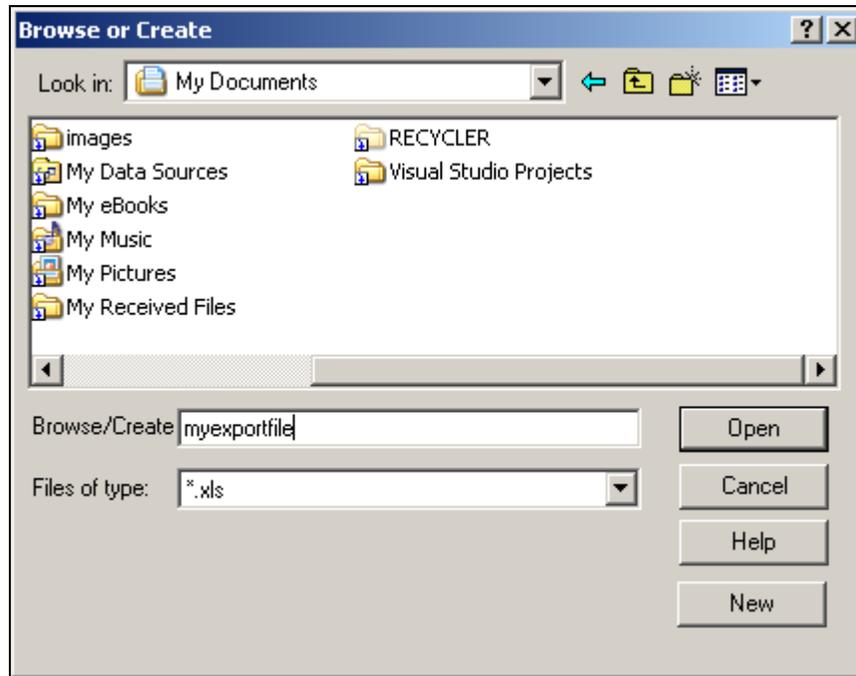


3.) Choose a file and path name for the report to output to.

a. Click Browse:



b. Choose the file name and click Open:



- 4.) Click the Run Report button.

To use any of the other output types, such as e-mail, choose the appropriate choice for the Print Preferences parameter and follow any additional instructions given on-screen.

## Interacting with Executive Reports

Executive reports have many powerful data analyzing features that make the big picture much clearer. Executive reports give you the power to zoom in to many different levels of data in a graphical and interactive manner. These reports may also be referred to as “Interactive Reports” or “Drill Down” reports. Most of the applications will have some interactive reports.

Executive Reports can be found within the Reports - Executive menu node. They can be run from each community that you wish to view information about; however, many of the executive reports contain information about every community in your company.

To print an Executive report:

- 1.) Expand the **Reports – Executive** menu node.
- 2.) Click on the report you wish to run.



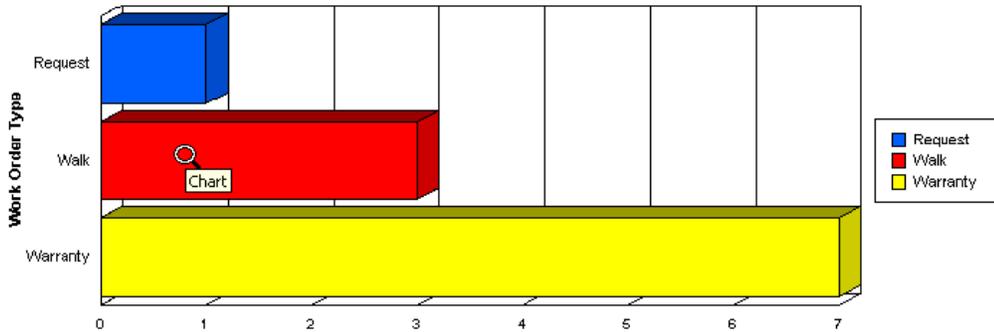
- 3.) Choose the parameters you wish (see above section ‘Setting Parameters’ for details)

4.) Choose the print method you wish. (See above section **Printing a Report** for details)

**\*\* Note:** executive reports will only be displayed in an interactive mode when using the 'Preview' print option.

5.) Click the **Run Report** button.

The key to interacting with Executive Reports is to double-click on any information you wish to view in more detail. Almost every section of each graph can drill-down into a more detailed view of the information displayed:



When you double-click on information that does contain a more detailed drill-down, the detailed view will open itself on a new preview tab:

Items of type Walk for Blackhawk Concrete in Silicon Ranch					
Job	WO Number	Description	Originally Scheduled	Scheduled	Completed
0056	10040003	Service Door-Patch chips in concrete stoop.	04/09/2001	04/11/2001	04/16/2001
0055	10060002	Service door-chip in concrete stoop.	04/11/2001	04/11/2001	05/23/2001
0009	06160012	Broken concrete at walk.	12/29/2000	01/04/2001	01/22/2001
<b>Total Work Orders: 3</b>					

Preview tabs are the pages of an Interactive report. Each time you drill-down to a new detail page, a new preview tab will automatically open:



To close any new preview tabs, click the X button above the tabs:

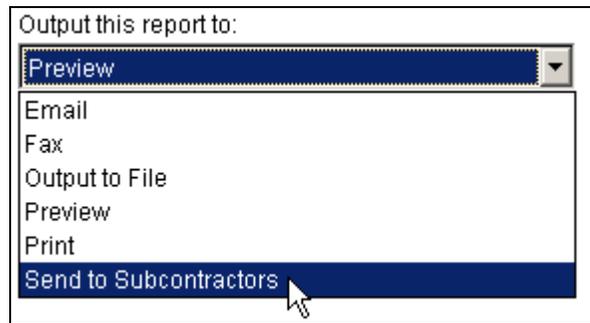


## Sending to Contractors

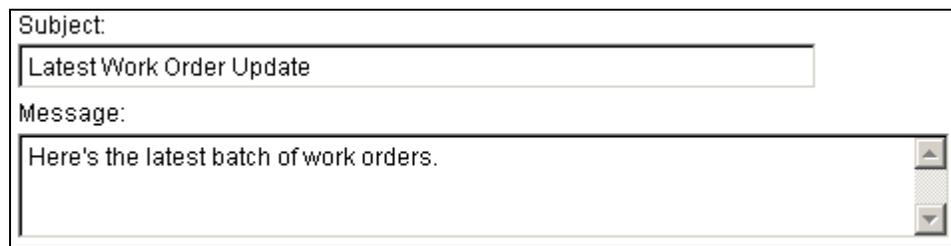
One of the more time-saving features of **CPS Enterprise** is the automated **SendTo Contractors** printing feature. This feature allows you to automatically send a list of any open work orders (or any other information for that

matter) to each of your contractors that you have defined a **Send-To** type for. This way, you can send a batch fax or e-mail to every sub contractor without having to touch a single piece of paper.

- 1.) Select the **SendTo Contractors** option from the **Print Preferences** field on the **Options** screen:



- 2.) Type a **Subject** and a **Message** that will proceed each report:

A screenshot of a software interface showing two input fields. The first field is labeled "Subject:" and contains the text "Latest Work Order Update". The second field is labeled "Message:" and contains the text "Here's the latest batch of work orders.".

- 3.) Click **Run Report**.
- 4.) You will be given a list of **Contractors**. Check the **Contractors** you wish to send the report to and their **Preferred Method** of receipt:



🎵 **Contractors** with pending tasks will automatically be selected in the list when printing any report designed to be sent to contractors. The **Send-To** type they have set on their **Contractor Information Card** determines which send-to types are checked automatically. See below **About Send-To Types** for more information.

#### About 'Send-To' Types

Some **Contractors** prefer to receive **work orders** via fax. Others may prefer to receive **work orders** via e-mail. **Send-To** types are options that determine which **Contractors** are set up to receive which types of distributions when using the **Send to Contractor** print option.

To set up **contractor** send-to types, check off the boxes for either e-mail or fax on their **Contractor Information Card**. To access the **Contractor Information Card**:

- 1.) Expand the **Contacts / Users** menu node.
- 2.) Click on the **Contractors** menu item.
- 3.) Double-click the **Contractor** you wish to view or modify from the list:



- 4.) Check either the **Email** or **Fax** check boxes in the **Send To:** field to indicate their reception preference:

**Contractors**

Company:  #

Trade:   Daily Work Hours

Office Phone #:  Fax #:

---

Name - First:  Last:

Job Title

Home #:  Mobile #:

Email

Send To:  Email  Fax

---

Address:

City, ST Zip

5.) Click **Save**.

## Database Maintenance and Best Practices

**CPS Enterprise** is built upon the industry proven Microsoft SQL Server 2000. This database is used because of its speed, reliability, and most importantly: scalability. There are a few things, however, that are important to consider when making decisions about exactly what flavor of SQL Server to use, as well as what the implications will be for Backups. This Chapter is necessary reading for any builder “hosting” their own SQL database; many builders utilize CPS’ hosting facilities and CPS provides database maintenance and best practices capabilities.

### Using an MSDE

MSDE is Microsoft’s version of SQL Server 2000 designed to run on any Desktop PC. Think of it as a SQL Server ‘Light’. Although it cannot process as quickly, or handle as large a database as the full-blown version of SQL Server, its primary advantage is that it is available at no cost.

MSDE is the recommended configuration for organizations with 1 – 5 users (including **CPS Enterprise** and **SalesBuilder** users). When the data needs of your organization increase or your number of users increases, all of your data can be easily migrated to a full-blown SQL Server 2000 installation.

### Using a SQL Server

Installation of the **CPS Enterprise** database on a SQL Server is the recommended configuration for more than 5 users, or if any one of the users is accessing the database over a VPN or WAN.

### Replication and Backups

Backing up data is the most important part of database maintenance. One recommended solution is Veritas Backup Exec version 8 or later. Be sure to designate one person from your organization as the responsible party for your backups. They should be done nightly, after everyone is finished using the database for the day. It’s also important to have a disaster recovery plan to employ in the event of a loss of data or equipment failure. Taking a few simple preventative steps can save lots of time and money when problems occur.

Replication is another acceptable option for database, though is not a perfect replacement for a good tape backup system. Replication can be configured for the **CPS Enterprise** database in a Publisher – Subscriber configuration. For more information on replication please see the Microsoft SQL Server 2000 Users Manual.

## Permissions and Security

Always be sure that only administrators have access to the maintenance and configuration functions of the SQL Server Database. If your organization uses a domain or a forest, it is recommended that you designate a SQL Administrators group as the sole Administrators who can make changes to the SQL Server configuration.

## Using CPS Enterprise over a WAN

**CPS Enterprise** can be run over a WAN as well as a LAN. The key to this functionality is a VPN (Virtual Private Network). When using a Virtual Private network, installation and configuration of CPS Enterprise is exactly the same as using it over a LAN, with the exception that creating a VPN connection is required before launching the application. For more information on VPN configuration, please see Microsoft's web technical web site at [www.technet.com](http://www.technet.com).

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