

ImproveBuild RBS Integrates with Guild Quality

ImproveBuild has availed of the open web services provided by Guild Quality (www.guildquality.com) to retrieve, store and display client surveys within Remodeler's Business Solution (RBS). Survey results can now be directly linked to a job within RBS. Additional functionality (reports, comparative graphs, trends, etc) may be added in the future depending on how RBS users want to use this data\information.

To start using this new integration capability, the GuildQuality.com user must "activate" the API (Application Programming Interface) provided by Guild Quality via the PREFERENCE area.

Once activated, the user will be provided with 2 pieces of information (UserName and Password) that will be entered and stored within RBS. Enter these values into the fields provided under the Third-Party tab of the Company Configuration screen.

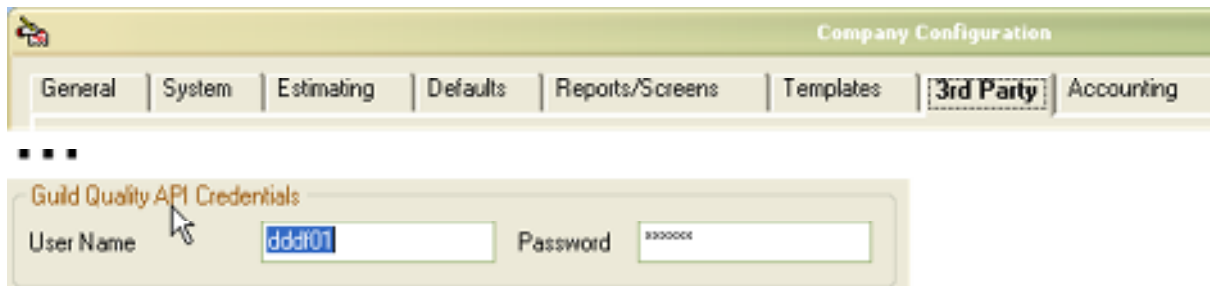


Fig. 1

Once the values have been entered into RBS, the RBS-GuildQuality integration module is activated the next time any RBS users logs in.

Users can retrieve the Guild Quality survey results using the "Guild Quality Surveys" menu option (available only when the credentials have been entered in the previous step).

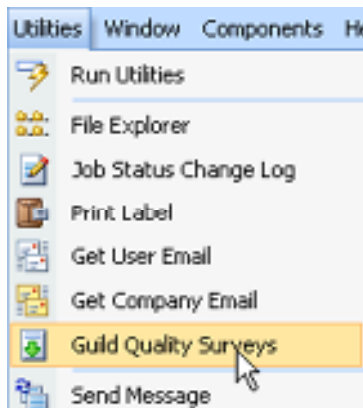


Fig. 2

The next screen will show all (or only unmatched) survey results in a list.

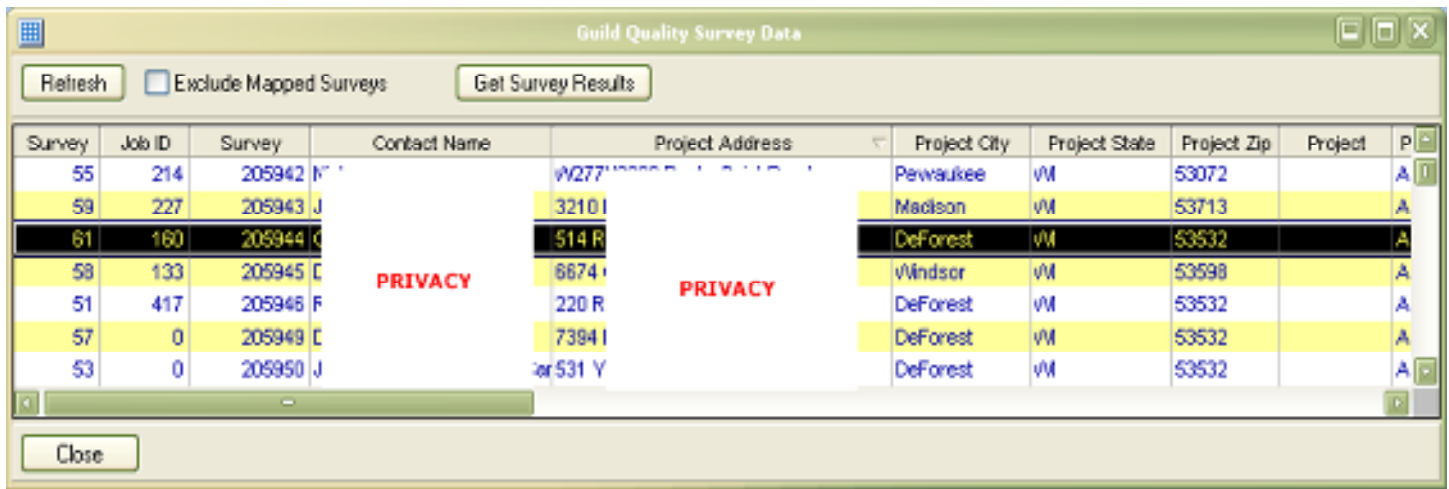


Fig. 3

Double-Click on any other columns of the row to display the actual survey results retrieved from Guild Quality (and now stored in RBS):

Fig. 4

Double-Click on the "Job ID" column to display the Job detail screen for the row.

At the bottom of ANY job that has one or more survey results linked to it, a button (with a star) will be displayed

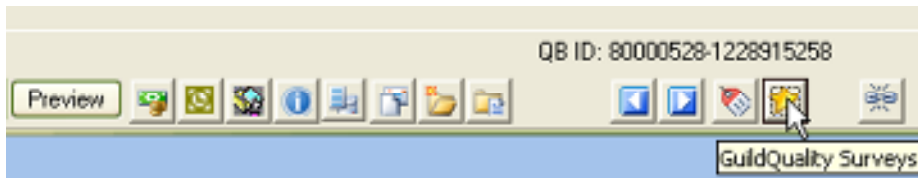


Fig. 5

Click on this button to see ALL the surveys (as many requested and returned for this job)

Click on the 'Get Survey Results' button to retrieve additional surveys from Guild Quality.

Check the 'Exclude Mapped Surveys' to see only the surveys that could not be automatically mapped (for one reason or another).

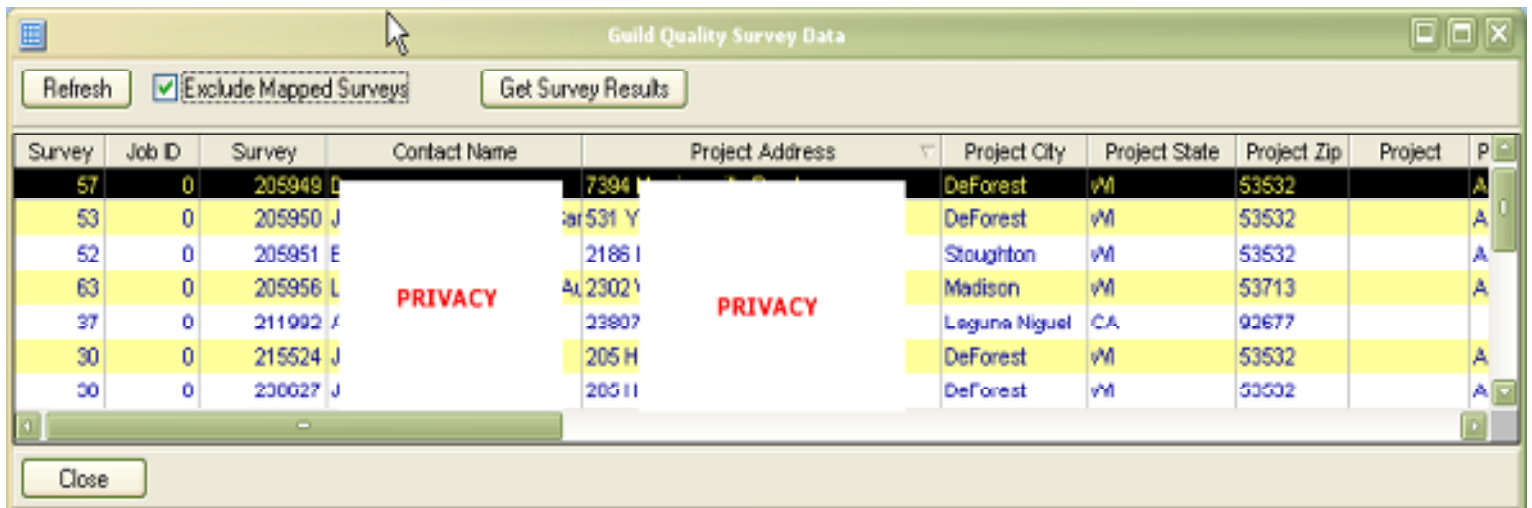


Fig. 6

On the Survey List screen (Fig. 3), highlight a row and do a Right-Mouse click to map any Surveys that could not be automatically mapped to an ImproveBuild Job (or to FIX any incorrect automatic mapping during the import of the survey data). This will bring up the default JOB selection\search screen:

Field	Operator	Value
Job Name*	LIKE	
Job Number***	=	
Is Qualified Lead	=	
Lot No	=	
Block No	=	
Job City*	LIKE	
Neighborhood*	LIKE	
County*	LIKE	
Job Phone* (###)###-####	LIKE	
Production Manager	=	
Project Manager	=	
Name of Resident(s)*	LIKE	
Job Address Line 1*	LIKE	7394 morrison
Postal Code*	LIKE	
Contract Amount (Min)	>=	
Contract Amount (Max)	<=	
Total Balance (Min)	>=	
Total Balance (Max)	<=	
Department	=	
Project Type	=	
Referral Source	=	
Job Status	=	
From Origin Date	>=	
To Origin Date	<=	
From Date Passed Final	>=	
To Date Passed Final	<=	
From Final Payment Date	>=	

Fig. 7

Enter the search\filter criteria to locate for the corresponding RBS Job. Once the selection criteria have been specified, click on the OK button to get the resulting list of matching job(s).

Job Name	All Job Name	Job Number	Job Phone	Origin Date	Proposal Accept Date	Contract	Actual Amount
Miller, Dave & Ruth	Whole House Fan	358	(703)244-5443	08/12/2007		\$11,899.25	\$11,899.25
Miller, Dave & Ruth	Kitchen	359	(703)244-5443	05/08/2002		\$12,500.00	\$30,894.60
Miller, Dave	Repairs	360	(703)244-5443	08/03/2004		\$1,643.05	\$1,643.05
TOTAL						\$25,842.30	\$44,336.90

Fig. 8

Double-Click on the job that will be mapped to the Survey result record.

Note: Future enhancements may include the following

- Ability to “submit” a job that one or more surveys need to be processed by Guild Quality. This capability will depend on the availability of the enhancements from Guild Quality to allow third-party software to submit such data for processing (which I was told is part of their future plan).
- Internal comparative graphs and reports as defined by the development and user community.