informXL 5.1

Release Overview Webinar

November 26th, 2019

Agenda

- ANALYZER 5.1 (10 mins)
- DATAMART 5.1 (15 mins)
- DASHBOARD 5.1 (10 mins)
- Q&A (5 mins)

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ANALYZER 5.1

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ANALYZER

New in ANALYZER 5.1

- *New* Ribbon Parameters
- *New* “ Bid Rates” Analyzer
- 30+ new fields and drill-downs
- Fixes and performance improvements
- *New* XDF module *(add-on module)*

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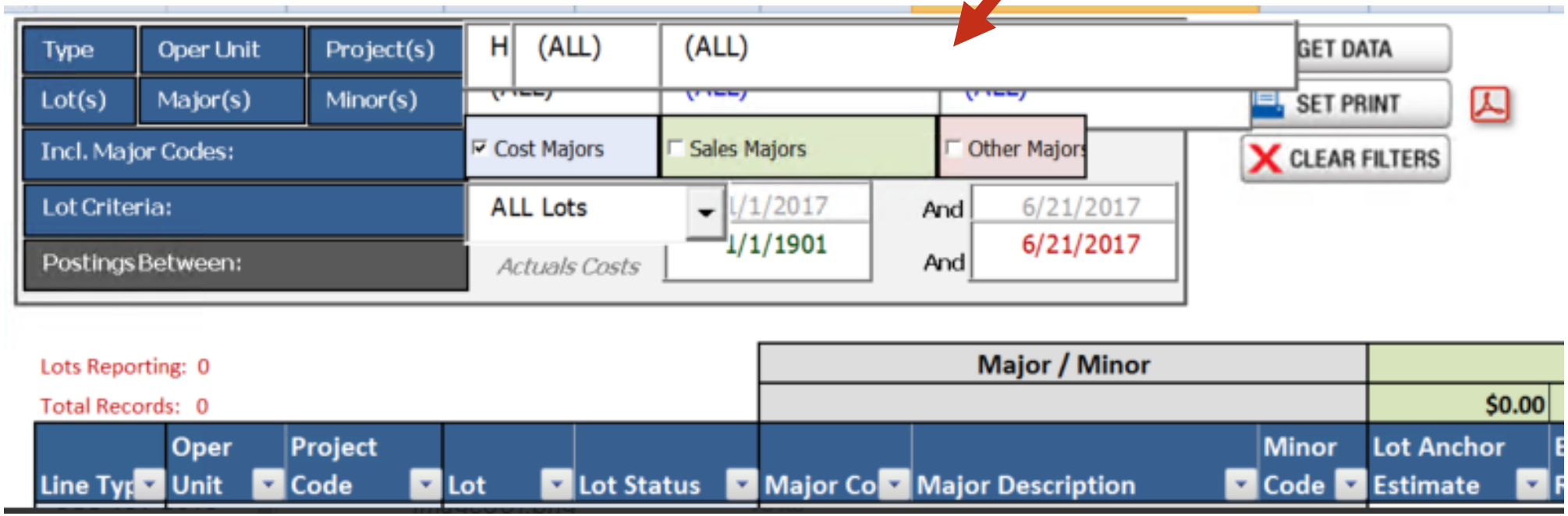
ANALYZER



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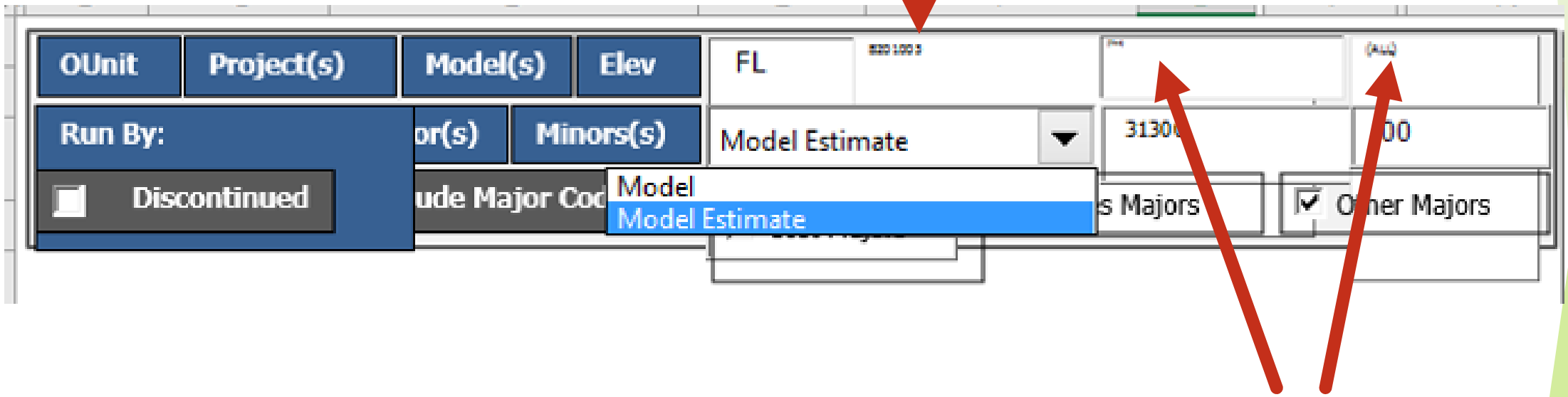
ANALYZER



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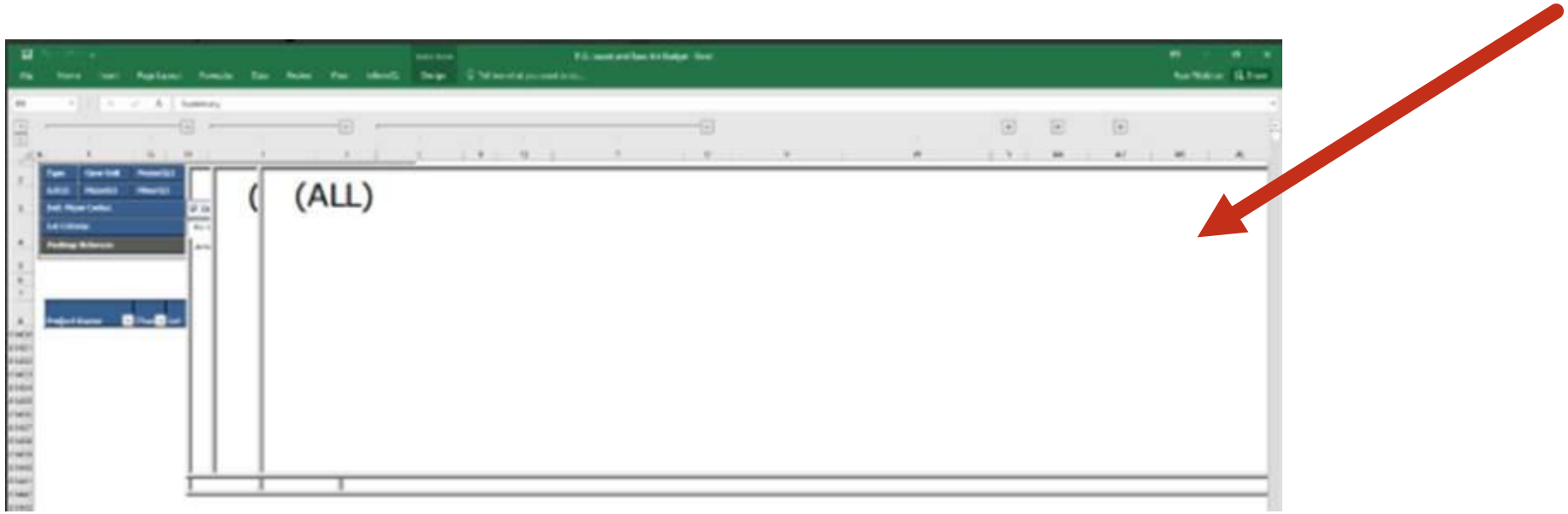
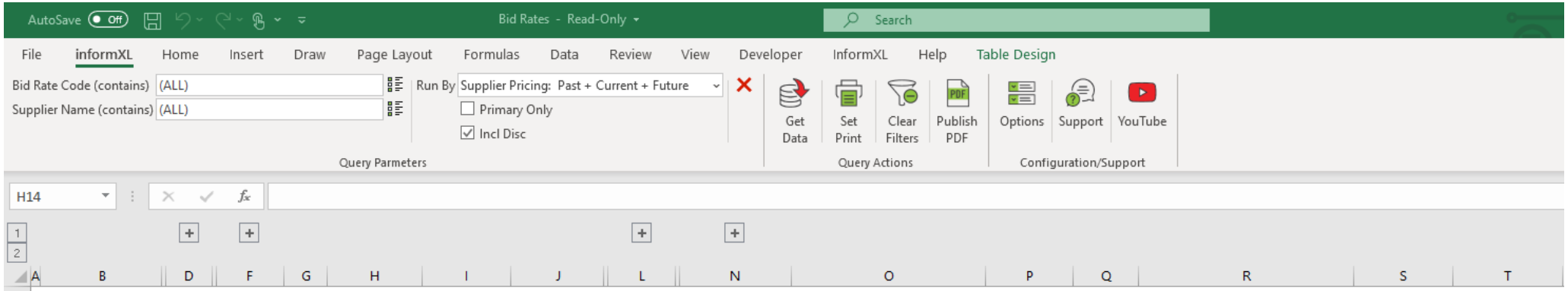
ANALYZER



Bid Rates ANALYZER



Bid Rate Code: (ALL) | **Supplier:** (ALL) | **Run By:** Supplier Pricing: Past + Current + F... | **Primary Only:** X | **Include Discontinued:** ✓ | **Refreshed:** Nov 18 2019 11:33AM

Filtered Count: 9

	Bid Rate Details					Task Details	Supplier						Supplier Pricing	
BidRate Code	UofM	Rate	Tax Cat	Std Measure Code	Std Measure UofM	Task Code	Supplier Is Prima	Supplier code	Supplier Name	Oper Unit	Project Code	Project Name	Effective Da	Supplier Rate
7 Course	LnFt	$0.00		LnFt	LnFt		✗							
71250	SqFt	$0.00		Sq. Ft.	SqFt		✓	SHAIMA	Michael E Griego	0003	0401-1	La Entrada	2/8/2018	$0.40
CON-DRAIN	e	$0.00					✗	COBCON	Cobblestone Concrete, Inc.	0002	0105-1	Stonegate Phase 5 & 6	6/19/2016	$50.00
CON-DRIVE	SqFt	$0.00					✗	COBCON	Cobblestone Concrete, Inc.	0002	0105-1	Stonegate Phase 5 & 6	6/19/2016	$3.00
CON-R&R	E	$0.00					✓	COBCON	Cobblestone Concrete, Inc.	0002	*	Multiple	6/20/2016	$2.95
CON-WALK	SqFt	$3.50		Each	E		✗							
Grad-Base	E	$0.00					✗							
Grad-R&R	E	$0.00					✓	VHGRAD	VH Grading & Excavating, Inc.	0002	*	Multiple	6/20/2016	$2.60
paver	SqFt	$1.00		Each	E		✗	COMGRO	Common Ground Services	0004	0301-1	Prescott Lakes	5/7/2017	$6.00

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ANALYZER

Option Revenue in Start Scrub

Options	Revenue Totals $51,761.00		
Wrap Text			
Product Description	Net Sale	Major Cod	Major De
		72900	Trim Car
Insulate 4' Garage Extension	$180.00	65000	Insulatio
Sound Insulation Batts at Interior Walls	$665.00	65000	Insulatio
Stage 1 Structural Selection Complete	$0.00		
Stoneridge Spanish Scheme 3	$0.00		
Additional Concrete	$300.00	73000	Walks &
R-13 Insulation at Ext Walls of 2 Car Garage	$465.00	65000	Insulatio
Custom Structrual Option #1	$695.00	50000	Framing
		61300	Stucco/S
		65000	Insulatio
		72900	Trim Car
Custom Structural Option #2	$164.00	50000	Framing
		72900	Trim Car
Custom Structural Option #3	$366.00	50000	Framing
		50400	Window
Custom Structural Room Option #1	$0.00		
Custom Structural Room Option #2	$175.00	50000	Framing
		50400	Window
Secondary Bath Custom Option 1	$248.00	60300	Plumbin
		71600	Bath Acc
Custom Kitchen Upgrades #2	$471.00	72900	Trim Car
Custom Structural Room Option #3	$208.00	50000	Framing
		72900	Trim Car
Custom Kitchen Upgrades #1	$175.00	50000	Framing
		50400	Window
		72900	Trim Car

t by Product | Pivot - Margin by Product | Pivot - Part Qty Review | Pivo

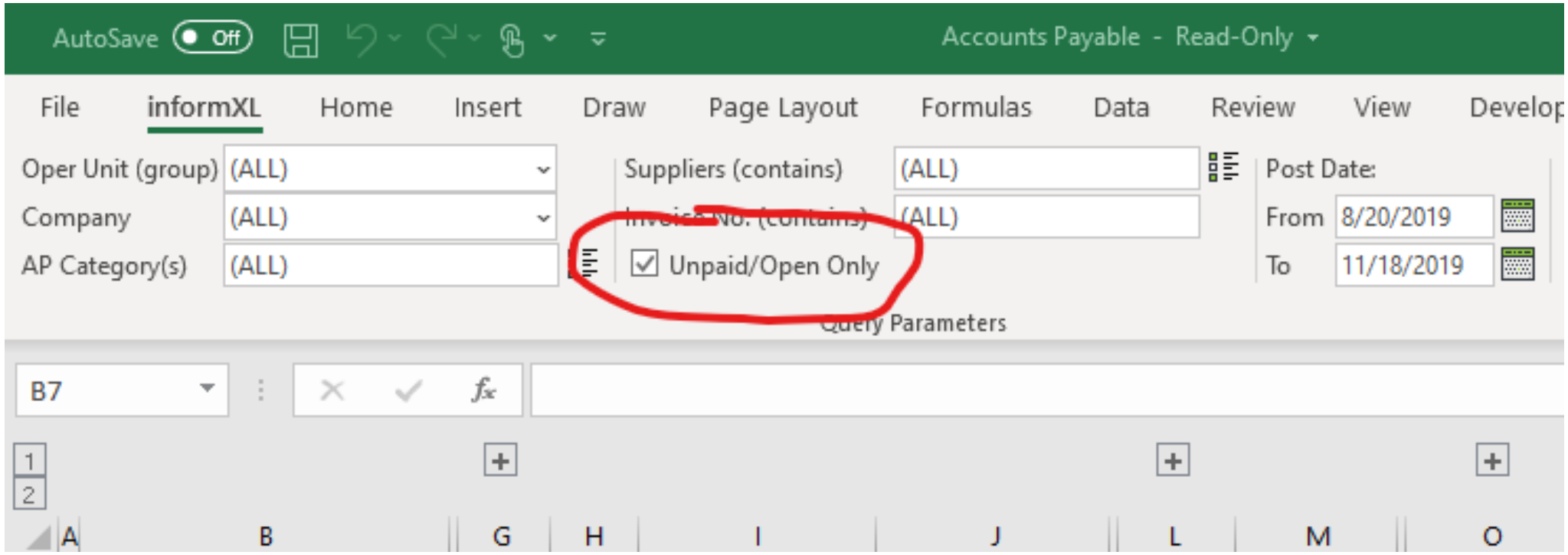
Option Margin Report

OUnit	(All)
Project Code	(All)

Project > Lot> Product	Product Description	Net Sale	Total Cost	Margin $	Margin %
Stonegate Phase 7		**$51,761.00**	**$39,072.48**	**$12,688.52**	**24.51%**
00775					
ST-SU0103	Optional Casita	$20,565.00	$14,696.25	$5,868.75	**28.54%**
ST-DO0100	Garage Service Door 2868	$913.00	$594.26	$318.74	**34.91%**
ST-GA0130	4' Garage Extension @ 2-Car Garage	$2,156.00	$1,672.00	$484.00	**22.45%**
ST-BA0150	Bay Window at Breakfast	$1,735.00	$1,465.00	$270.00	**15.56%**
ST-DE0105	Den ILO Dining	$678.00	$589.48	$88.52	**13.06%**
EN-IN0251	Insulate 4' Garage Extension	$180.00	$36.00	$144.00	**80.00%**
EN-IN0160	Sound Insulation Batts at Interior Walls	$665.00	$477.00	$188.00	**28.27%**

informXL ANALYZER

“Unpaid” in Accounts Payable



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ANALYZER

XDF Module (enhanced UDF's)

NEWSTAR Enterprise, Version 2019.3.00, Database = C:\NSTARDB\hblive10G\sHBLive10G - (1/100)

File Tools Help

- Homebuilder Enterprise
  - Home Production
  - Production Master
    - System Masters
      - Job Types
      - Minor Codes
      - Major Codes
      - Draw Codes
      - Craft Codes
      - Room Codes
      - Standard Measures
      - Part Usage Codes
      - Sales Types
      - Finance Types
      - Industry Types
      - Note Types
      - Builders
      - Project Phases/Floors
      - User Defined Fields
      - XDF Labels
      - XDF Value Import
      - GL Company Interface
      - GL Job Interface
      - Closing JE Templates

XDF Labels

Group Name	Seq No	Type	Label	Inactive	Filter Value 1	Filter Value 2
Address	00.00	Yes/No	Current	no		
Company	00.00	Memo	Region	no	*	*
Customer	00.00	Memo	Alternate Email	no		
Home Sale	00.00	Yes/No	Investment Property	no	*	*
Lot	00.00	Date	Design Appointment Date	no	*	*
Lot	00.00	List	Lender	no	*	*
Project	00.00	Date	Open Date	no	AZ	*
Project	00.00	Memo	Region	no	*	*
Project	00.00	Memo	Plat Date	no	AZ	SR,RANCH,MAPLEF
Project	00.00	Numeric	Margin %	no	*	*
Project	02.00	Date	Site Plan Approved	no	*	*
Project	04.00	Yes/No	Costed	no	*	*
Supplier	00.00	Date	Agreement Date	no		

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DATAMART 5.1

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ANALYZER

- Accounts Payable
- Checks
- GL Balance
- Job Cost Details
- Job Scrub
- Lot Details
- Lot Options
- Lot Schedules
- Model Estimate
- Parts
- PO Details
- Sales Summary NSE
- Sales Summary NSS
- Start Scrub
- Subcontract Details
- Suppliers
- Takeoff Margin
- Warranty Details

DATAMART

- dbo.AccountsPayable
- dbo.Checks
- dbo.GLBalance
- dbo.JobCostDetails
- dbo.JobScrub
- dbo.LotDetails
- dbo.LotOptions
- dbo.LotSchedules
- dbo.ModelEstimate
- dbo.Parts
- dbo.PODetails
- dbo.SalesSummary_NSE
- dbo.SalesSummary_NSS
- dbo.StartScrub
- dbo.SubcontractDetails
- dbo.Suppliers
- dbo.TakeoffMargin
- dbo.WarrantyDetails

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DATAMART

- Accounts Payable
- Checks
- GL Balance
- Job Cost Details
- Job Scrub
- Lot Details
- Lot Options
- Lot Schedules
- Model Estimate
- Parts
- PO Details
- Prospects
- Sales Summary NSE
- Sales Summary NSS
- Start Scrub
- Subcontract Details
- Suppliers
- Takeoff Margin
- Warranty Details

MY CUSTOM ANALYZER

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DATAMART

New in DATAMART 5.1

- 30+ new *helper* SQL Views
  - helper.GLBudgets
  - xmple.SalesAndInventory
  - xmple.MilestoneDaysBetween

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DATAMART

helper.GLBudgets

	Column Labels											
	January			February			March			April		
GL Account	Budget	Actual	Over/Under	Budget	Actual	Over/Under	Budget	Actual	Over/Under	Budget	Actual	Over/Under
401K Company Match	$7,917	$15,477	$7,560	$7,917	$19,388	$11,471	$7,917	$15,482	$7,565	$7,917	$9,306	$1,389
Accounting Fees	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,500	$1,500
Accrued Pension Expense	$12,171	$14,718	$2,547	$12,171	$14,718	$2,547	$12,171	$14,718	$2,547	$12,171	$14,718	$2,547
Advertising	$21,720	$16,978	($4,742)	$20,970	$22,161	$1,191	$18,660	$21,324	$2,664	$22,947	$22,181	($766)
Advertising & Promotion	$1,250	$1,593	$343	$1,250	$834	($416)	$1,250	$2,553	$1,303	$1,250	$71	($1,179)
Allocated Lot Costs - Homes	$11,520	$8,190	($3,330)	$12,310	$18,225	$5,915	$13,020	$17,455	$4,435	$13,960	$8,015	($5,945)
Amort of Model Home Furniture	$28,932	$10,403	($18,529)	$21,625	$24,449	$2,824	$25,479	$25,883	$404	$25,462	$8,749	($16,713)
Appraisal/Inspection	$667	$325	($342)	$667	$25	($642)	$667	$575	($92)	$667	$325	($342)
Audit & Tax	$1,292	$1,250	($42)	$1,292	$1,250	($42)	$1,292	$1,250	($42)	$1,292	$3,267	$1,975
Bank Charges	$9,322	$7,399	($1,923)	$10,894	$10,178	($717)	$15,873	$13,178	($2,695)	$17,176	$33,459	$16,283
Banquet Labor	$3,668	$2,476	($1,192)	$4,113	$2,656	($1,457)	$9,146	$7,541	($1,605)	$11,695	$8,750	($2,945)
Banquet Rental Revenue	-$2,429	-$1,828	$601	-$2,202	-$1,331	$871	-$11,748	-$15,131	($3,384)	-$16,301	-$18,199	($1,898)
Banquet Sales	-$13,540	-$14,128	($587)	-$8,102	-$5,348	$2,755	-$40,547	-$34,269	$6,278	-$49,965	-$46,406	$3,558
Bar	-$4,356	-$4,728	($372)	-$6,866	-$9,912	($3,046)	-$14,337	-$14,628	($291)	-$12,802	-$14,218	($1,416)
Beverage Cart / Snack Bar	-$8,141	-$6,443	$1,698	-$13,266	-$13,561	($295)	-$23,845	-$26,674	($2,829)	-$29,482	-$30,219	($737)
Bldg Maintenance & Repair	$722	$0	($722)	$722	$20	($702)	$722	$0	($722)	$722	-$100	($822)
Broker Activities	$83	$0	($83)	$83	$0	($83)	$83	$0	($83)	$83	$0	($83)
Broker Materials	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building/Office Rental	$22,592	$33,627	$11,035	$22,592	$34,427	$11,835	$22,592	$33,627	$11,035	$22,592	$32,004	$9,412
Bunker Sand	$2,275	$1,483	($792)	$0	$0	$0	$1,475	$2,388	$913	$0	-$33	($33)
Business Meetings	$575	$279	($296)	$575	$193	($382)	$1,042	$34	($1,008)	$575	$481	($95)
CAM Maintenance	$689	$1,721	$1,032	$689	$0	($689)	$689	$0	($689)	$689	$0	($689)
CAM Reimbursement	-$1,965	-$3,910	($1,945)	-$1,965	-$3,910	($1,945)	-$1,965	-$3,910	($1,945)	-$1,965	-$2,821	($856)
Capitalized Benefits	-$9,073	-$9,074	($0)	-$13,269	-$13,268	$0	-$9,073	-$9,074	($0)	-$9,073	-$9,074	($0)
Capitalized Interest - Homes	$86,426	$97,470	$11,044	$64,474	$183,912	$119,438	$82,149	$228,333	$146,184	$74,870	$119,982	$45,112
Capitalized Interest Expense	-$62,500	-$415,441	($352,941)	-$63,995	-$351,918	($287,924)	-$65,502	-$160,302	($94,799)	-$67,023	-$157,641	($90,618)
Capitalized Salaries	-$25,924	-$25,924	($0)	-$37,910	-$37,910	$0	-$25,924	-$25,924	($0)	-$25,924	-$25,924	($0)
Cart Lease	$16,158	$16,158	($0)	$16,158	$16,158	($0)	$16,158	$16,158	($0)	$16,158	$16,158	($0)
Cart Rental	-$65,404	-$45,513	$19,891	-$89,102	-$84,950	$4,152	-$150,564	-$141,882	$8,681	-$153,158	-$150,191	$2,967
Cash Over/Short	$8	$6	($2)	$8	$106	$98	$8	$30	$22	$8	$108	$100
Cellular Phones	$6,190	$4,461	($1,729)	$6,190	$4,287	($1,903)	$6,190	$4,301	($1,889)	$6,190	$3,804	($2,386)
Chemicals	$3,050	$1,045	($2,005)	$2,550	$1,885	($665)	$7,600	$6,509	($1,091)	$8,800	$14,397	$5,597

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DATAMART

xmple.SalesAndInventory

Ounit Code	%
Project Code	%
As of Date	10/24/2015

GET DATA

Sum of StatCount	Column Labels				
Row Labels	7-DAYS	30-DAYS	CURRENT YEAR	12-MONTHS	TTD
Sold	**19**	**43**	**349**	**374**	**480**
Stonegate II	14	26	205	205	205
Indian Ridge III	3	8	60	85	191
Las Casitas IV	2	9	84	84	84
Cans		**3**	**25**	**34**	**56**
Stonegate II		2	9	9	9
Indian Ridge III			8	17	39
Las Casitas IV		1	8	8	8
Closed	**4**	**26**	**128**	**165**	**180**
Stonegate II	3	20	44	44	44
Indian Ridge III	1	6	84	121	136
Grand Total	23	72	502	573	716

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xmple.MilestoneDaysBetween

A	B	C	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
					Avg Days		Avg Days		Avg Days		Avg Days		Avg Days		Avg Days	
					20.6		20.1		3.3		41.0		23.5		7.1	
OUnit Code	Project Code	Lot	FOUND		FOUND to FRAME	FRAME	FRAME to DRYWL	DRYWL	DRYWL to PAINT	PAINT	PAINT to CLEAN	CLEAN	CLEAN TO WALK	WALK	WALK TO CLOSE	CLOSE
0002	0105-1	00327		11/18/2014	19	12/13/2014	21	1/12/2015	7	1/20/2015	69	4/25/2015	33	6/10/2015	3	6/13/2015
0002	0105-1	00328		1/19/2015	18	2/11/2015	9	2/23/2015	3	2/25/2015	45	4/28/2015	29	6/6/2015	2	6/9/2015
0002	0105-1	00329		1/19/2015	17	2/10/2015	12	2/25/2015	8	3/8/2015	38	4/29/2015	26	6/3/2015	4	6/8/2015
0002	0105-1	00330		10/25/2014	16	11/17/2014	16	12/8/2014	10	12/20/2014	60	3/15/2015	17	4/7/2015	39	5/31/2015
0002	0105-1	00331		10/26/2014	16	11/17/2014	18	12/10/2014	8	12/21/2014	60	3/14/2015	16	4/6/2015	41	6/1/2015
0002	0105-1	00332		10/27/2014	17	11/18/2014	16	12/9/2014	10	12/22/2014	61	3/16/2015	57	6/2/2015	-1	6/2/2015
0002	0105-1	00333		10/29/2014	16	11/19/2014	24	12/22/2014	5	12/27/2014	63	3/25/2015	48	5/30/2015	3	6/3/2015
0002	0105-1	00334		11/1/2014	15	11/23/2014	21	12/22/2014	7	12/30/2014	56	3/17/2015	59	6/7/2015	0	6/6/2015
0002	0105-1	00335		11/10/2014	25	12/14/2014	25	1/18/2015	1	1/19/2015	53	4/1/2015	44	6/1/2015	5	6/7/2015
0002	0105-1	00337		11/30/2016	8	12/11/2016	20	1/8/2017	2	1/10/2017	34	2/26/2017	20	3/26/2017	5	4/2/2017

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DATAMART

DATAMART Enterprise

- Enhanced Active Refresh
- Data Snapshots
- Budget Upload

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DATAMART

Datamart Enterprise: "*Enhanced* Active Refresh"

Prior Tables	NEW Tables
Accounts Payable	Job Scrub
GL Balance	Lot Details
Job Cost Details	Lot Options
PO Details	Model Estimate
Takeoff Margin	Sales Summary NSE
	Suppliers

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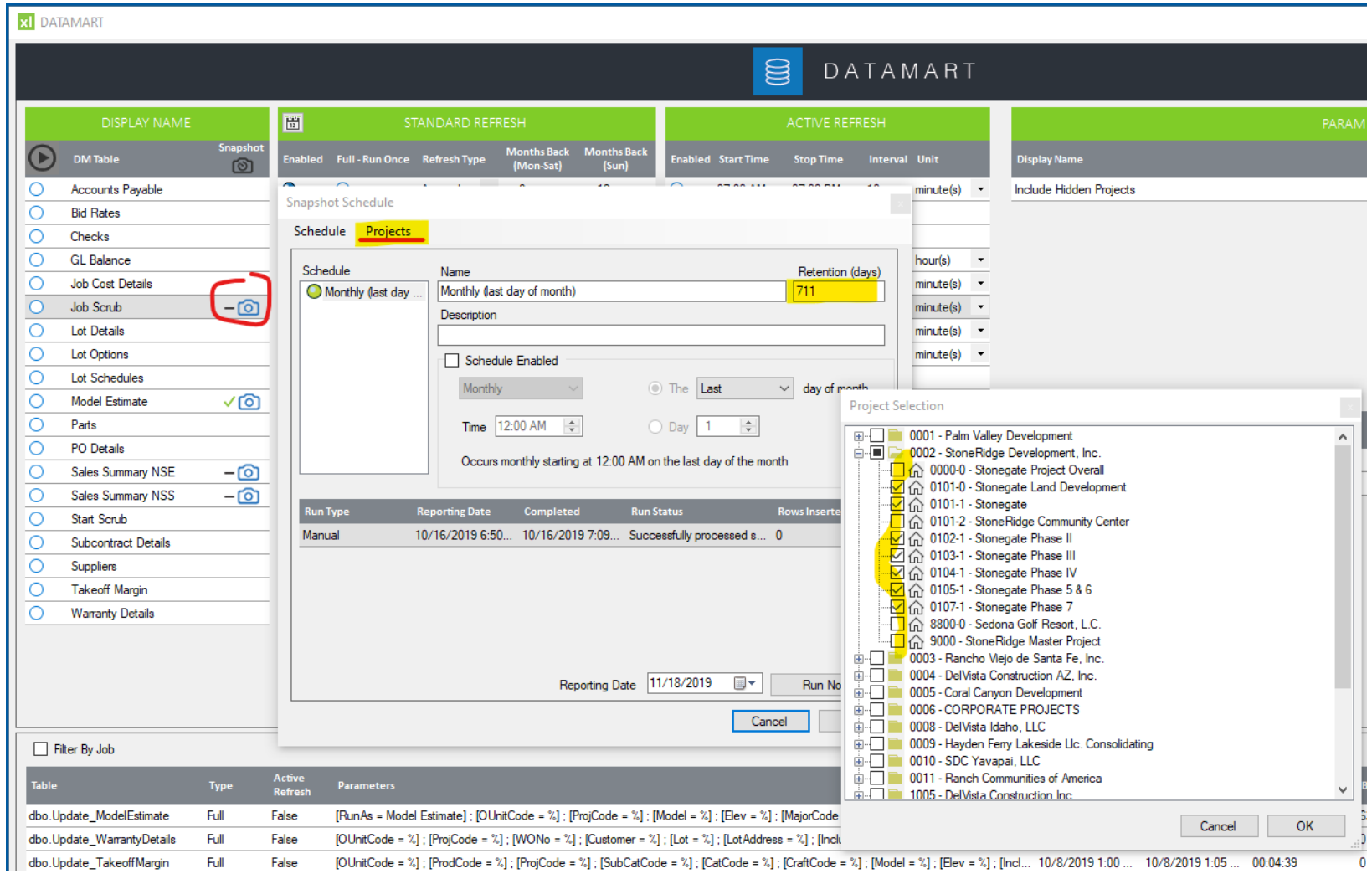
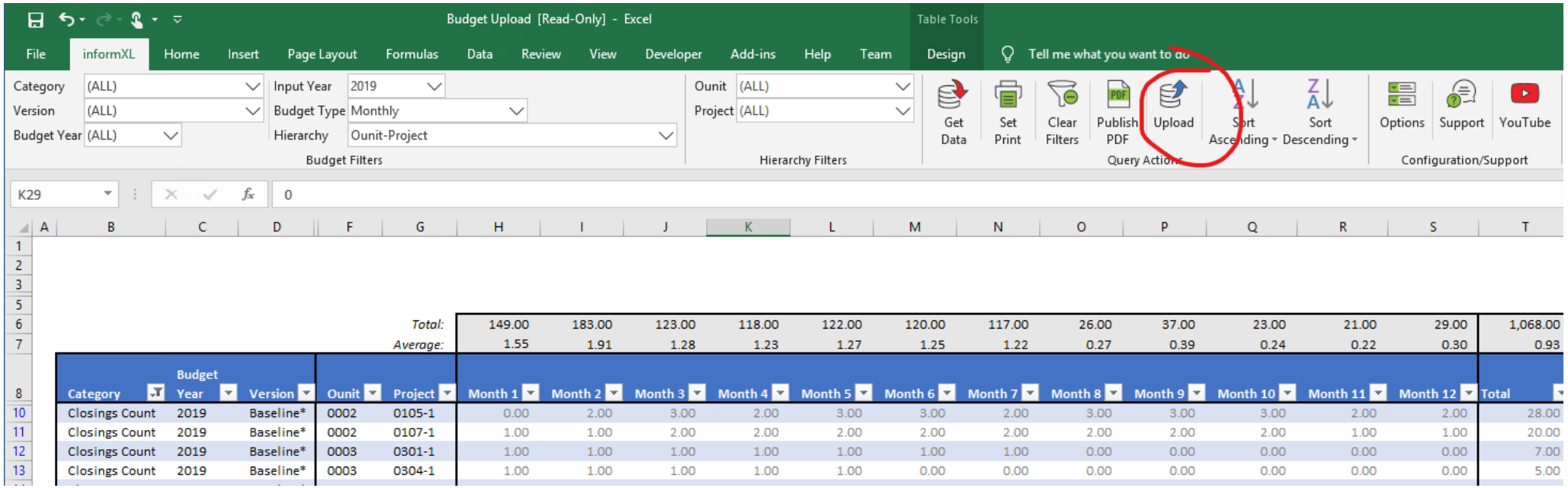
DATAMART

Datamart Enterprise: “Data Snapshots”



Datamart Enterprise: “Budget Upload”



	Category	Budget Year	Version	Ounit	Project	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Total
6					*Total:*	149.00	183.00	123.00	118.00	122.00	120.00	117.00	26.00	37.00	23.00	21.00	29.00	1,068.00
7					*Average:*	1.55	1.91	1.28	1.23	1.27	1.25	1.22	0.27	0.39	0.24	0.22	0.30	0.93
10	Closings Count	2019	Baseline*	0002	0105-1	0.00	2.00	3.00	2.00	3.00	3.00	2.00	3.00	3.00	3.00	2.00	2.00	28.00
11	Closings Count	2019	Baseline*	0002	0107-1	1.00	1.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	1.00	1.00	20.00
12	Closings Count	2019	Baseline*	0003	0301-1	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	7.00
13	Closings Count	2019	Baseline*	0003	0304-1	1.00	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.00

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DATAMART

Report Writing Services

HMS

CORNERSTONE

SOLUTIONS

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DASHBOARD 5.1

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DASHBOARD

NEW Dashboard Templates

- Library of 30 pre-built Dashboard widgets
- Fast-tracked reduced cost implementation
- Self-service personalized

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Ready to schedule your **5.1** upgrade?

Email: support@center6.com