

Closing Summary Report Enhancement

Program(s): PSClient Software Report: 3918
Reports | Management | Closing Summary (Financial)

Added a new "Include" report option to select either "Sales Associates" or "Real Estate Agent".

Client Detail Report Enhancement

Program(s): PSClient Software Report: 3949
Reports | Client Detail Report

Expanded the report setup options to allow users to select which sections of information they want to print out.

Exchange Payment Approval Report

Program(s): PSClient Software Report: 3953
File | Exchange | Payment Approval Report

Added a new report which will print out approved payment information that will be used when exchanging data to Gemini.

Client Profile Report Enhancement

Program(s): PSClient Software Report: 3957
Reports | Client Profile Report | General

Added a new checkbox, "Skip test if client has no date in a field", to the report setup options. If checked, any blank date fields in the client record will not be tested (i.e., the record will be considered to be within range).

Management Report Enhancement

Program(s): PSClient Software Report: 3961
Reports | Management | Management Overview

Added a new sort option, "Subdivision, Lot Num, Client Name", to the Sort Order pull-down list.

PSClient Work Orders

Program(s): PSClient Software Report: 4011
Clients | Transactions

Added a new checkbox, "Show WO #", to the Client Transaction window. When checked, a new "W/O #" column displays client Warranty Work Order numbers. Also added the ability to print a Warranty Request directly from the Client Transaction Insert/Change Warranty detail window.

Subdivision County Information

Program(s): PSClient Software Report: 4016
Maintenance | Subdivision & Lots

Added a new field, "County", to the Subdivision header. It has also been added to both the MS Word and TxText tokens lists. In the case of MS Word, it is a part of the existing "G" group.

Quick Update Enhancement

Program(s): PSClient Software Report: 4025
Scheduling | Quick Schedule Update

Changed sort logic to return the cursor to its last record position after either the "Change Table" or "Save Changes" options are used. NOTE: Since the "Start Date" is part of the cursor return/repositioning sort logic, if it is changed, the record return point may differ because the new Start Date no longer matches the original sort criteria.

All Programs - "Program Connect" Enhancements

Program(s): PSClient, Eclare, Gemini, Other Software Report: 4030

Help | Check for Updates

File | Backup Company Data | Send to Prosoft

File | Customer Suggestions | Insert/Change | Send to Prosoft

Enhanced the routine(s) which allows users to communicate with our server to download or upload program updates/data/other information via the internet. We also added the capability to send customer suggestions. In order to work, the user computer on which our program is installed must have access to the internet. Internal firewalls and other hardware and/or software protections schemes and programs may interfere with or completely prevent access.

Client Contact Information

Program(s): PSClient Software Report: 4033

Clients | Insert/Change | Alt Contact

Added a new "Alt Contact" tab with a set of alternate contact fields for each client. It allows you to maintain the original contact information on the General tab. If the "Use Alternate Contact" box on the Alt Contact tab is checked, information from the alternate contact fields will be used on reports throughout the program.

Closing Summary Financial Report Enhancement

Program(s): PSClient Software Report: 4060

Reports | Management | Closing Summary (Financial)

Added a new report sort order pull-down, "Date (No Subdivision)". When selected, it will sort the report by the selected date without regard to subdivision. NOTE: Although the report will not be sorted by subdivision, it can still be filtered to include a specific subdivision.

Text Document Maintenance Enhancements

Program(s): PSClient Software Report: 4074

Maintenance | Administrator | TX Document Maintenance

Clients | Change | Client Documents

Client | Change | Contract Tab | Print Contract

Client | Transactions

TX (Text) Control is a new module which replaces the word processing module used in prior versions. TX Control provides additional capability and enhanced interface options (through the use of Tokens) not available in previous Word interfaces. The Microsoft Word** interface is being replaced as a vehicle for managing PSClient documents because of the way the Word interface with other applications is evolving. PSClient version 18 will be the last release which includes the familiar Word interface.

Sales Representative and Mail Merge

Program(s): PSClient Software Report: 4083

Maintenance | Administrator | Sales Associates | Insert/Change

Added two new Sales Associate fields, "Cell Phone" and "Email". Both fields have also been added to the mail merge areas as necessary.

AFE Fax Server Update

Program(s): PSClient, Eclare, Gemini Software Report: 4087

A newer version of the AFE Fax Server program is now included with our programs. It may be launched from either the program CD or, after the program upgrade has been installed, from the program folder.

Client Header - New Fields

Program(s): PSClient Software Report: 4088

File | Supervisor | Configuration | Misc Information

Added two new user definable fields, "Description for Addtl Key 2" and "Description for Addtl Key 3" for use in the client header.

Clients Browser Enhancement

Program(s): PSClient Software Report: 4089

Clients | Insert/Change

Added a "Subdivision" filter option to the Clients browser window. If a Subdivision is selected, only the clients within that Subdivision will display. If no Subdivision is selected, all clients will display.

Client Profile Report Enhancement

Program(s): PSClient Software Report: 4112

Reports | Client Profile Reports | Transactions

Added a "Skip Client Done Transactions" checkbox to the report setup options. When checked, completed transactions will be suppressed.

Construction Overview Report Change

Program(s): PSClient Software Report: 4124

Scheduling | Reports | Construction Overview

Added a new "Subdivision, Lot Number" sort option to the Report Order pull-down.

PSClient/Eclare Model Price Updating

Program(s): PSClient, Eclare Software Report: 4135

Maintenance | Models | Insert/Change

File | Exchange | Retrieve Model Option Costs

Added a new "Eclare Link" field to the Model Maintenance browse window. When exchanging model pricing information with Eclare, the program will use information in the Eclare Link field instead of the PSClient model name.

User Maintenance Enhancements - All Programs

Program(s): PSClient, Eclare, Gemini Software Report: 4184

Eclare, Gemini, and PSClient: File | User Maintenance | Security

Added a new "User Maint" checkbox to the User Maintenance Security tab and moved the User Maintenance option from under the Supervisor menu to the File menu. When checked, the "User Maint" option allows trusted users access to the User Maintenance area. If a user's security options are changed while that user is logged in, he/she must either exit the program or log out and then log back into that company before the change(s) will take effect.

E-Lead Retrieval

Program(s): PSClient, Other Software Report: 4196

Maintenance | Administrator | E-Leads Configuration

Maintenance | E-Leads Retrieval

Added a new option that will allow email customer leads generated through your website to be imported into PSClient. Also added a new client status called "E-Lead". NOTE: Customer website must be configured to provide the required data.

Client Transaction Duplication

Program(s): PSClient Software Report: 4202

Added the ability to duplicate most existing Client Transactions and repeat it to the same client for a number of "To Do By" users or to multiple clients with a single "To Do By".

Client Proposal Report Enhancement

Program(s): PSClient Software Report: 4204

File | Supervisor | Configuration | Misc Information

Added user report setup options to either print a Company Logo and/or to "Print Company Header" on the Client Proposal report in a new "Client Proposal Options" box. If both options are set up/selected, the Company Header information automatically prints to the right of the Company Logo.

If using multiple company logos, each company's logo file must have a unique name and be physically located in the PSClient programs folder. Logo files must also be in the .JPG, .JPEG, .BMP, or .GIF file format and the filename cannot exceed a total of twenty characters including the file extension type (for example, MY LOGO FILENAME.JPG).

Quick Schedule Update

Program(s): PSClient Software Report: 4209

Scheduling | Quick Schedule Update

Added a new "Sort by" pull-down which allows tasks to be sorted by Task ID instead of Start Date.

Print Single Envelope

Program(s): PSClient Software Report: 4216

Clients | Transactions

Replaced the Print Label button used in earlier versions with an "Envelope" button which will allow single envelopes to be printed on demand. When the "Envelope" button is selected, a "Print Envelope" window will appear with the default "To Address" filled in. It may be edited as desired prior to printing.

When checked, a "Show Detail" checkbox on the Print Envelope window allows the user to either select from a list of pre-defined form/envelope sizes or to define a custom form/envelope. Another checkbox, "Do not print return address", allows printing of the Return Address to be suppressed.

TX Text User Entry Group Enhancement

Program(s): PSClient Software Report: 4229

Increased the number of user entry values in TX Control from 9 to 99.

TXText Integration

Program(s): PSClient Software Report: 4230

Where applicable, the TX Control function has been moved to be the primary word processing option since the Microsoft Word** interface will be removed in the next release.

PS Client Mail Merge Enhancement

Program(s): PSClient Software Report: 4231

File | Supervisor | Configuration

Client | Insert/Change

Maintenance | Administrator | Mail Processing Task Maintenance

Maintenance | Administrator | Mail Processing Task Maintenance | Convert

File | Mail Processing

Reports | Setup Reports | Mail Processing Task

TX Control is now the required method for auto mail processing; a new level has been added in this section and the number of mailings per level has been increased. Additional support has also been added for email transactions. NOTE: Requires the optional PDF/Email module.

Client Scheduled Deposits

Program(s): PSClient Software Report: 4233

Clients | Insert/Change | Departments | Finance | Deposit Detail

Added new "Amount" and "Due" (date) fields to a new "Scheduled Deposits" box on the Client Deposits window which allows up to four deposit payments to be pre-scheduled. The new fields are available in the Client Profile Export and Client Detail areas and have also been added as TxText tokens for documents.

Program Update Installation Enhancement

Program(s): PSClient, Eclare, Gemini, Other Software Report: 4236

Help | Check for Updates

Added user notification when an update has been downloaded from the internet but has not yet been installed. The first time a user with "Administrative" security logs into any company, he/she will be asked if they wish to install the update. If they do wish to install it, they must make sure all users are out of the program before answering "Yes" to the prompt.

Print Envelope

Program(s): PSClient, Eclare, Gemini Software Report: 4243

Eclare: Maintenance | Vendors | Contacts

Gemini: AP | Vendor List Maintenance | Contacts

AR | Customer List Maintenance | Contacts

PR | Employee List Maintenance

PSClient: Scheduling | Maintenance | Vendor List | Contacts

Added an "Envelopes" button to the various programs and menu options noted, above, which will allow single envelopes to be printed on demand. When the "Envelope" button is selected, a "Print Envelope" window will appear with the default "To Address" filled in. It may be edited as desired prior to printing.

When checked, a "Show Detail" checkbox on the Print Envelope window allows the user to either select from a list of pre-defined form/envelope sizes or to define a custom form/envelope. Another checkbox, "Do not print return address", allows printing of the Return Address to be suppressed.

New Option Detail TXText Tokens

Program(s): PSClient Software Report: 4305

Maintenance | Administrator | Mail Processing Task Maintenance

New tokens were added to TX Control that allows printing of detail with and without quantity and/or dollar amounts.

TxText Contract Document

Program(s): PSClient Software Report: 4307

Added two new tokens to PSClient Contract TxText documents. The first, "ContractPriorToAddenda", shows the total of contract prior to the currently printed contract. The second, "ContractAfterAddenda", shows the total of the contract after the currently printed contract.

Color Selection Report Enhancement

Program(s): PSClient Software Report: 4308

Reports | Color Selection | Color Selection Report

Made changes to the header to improve report usability.

MS Word Disable Capability

Program(s): PSClient Software Report: 4314

File | Supervisor | Configuration | General Information

Added a button, "Disable MS Word"**, which provides the capability to completely disable the Microsoft Word interface once users have converted to TX Control.

Client Deletion Enhancement

Program(s): PSClient Software Report: 4316

File | Supervisor | Configuration

Added a new checkbox option, "Client may only be deleted by Administrator" to the General Information tab. This is a Global Configuration option which, when checked, will only allow users with Administrator authority to delete a client.

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