

## Gemini Accounting 20XX TxText Maintenance

### Manual Lien Waiver Conversion Using TxText

This document is required if you are upgrading from Gemini version 18 or earlier to Gemini version 20XX and produce Lien Waivers through the Gemini program.

TxText is a third-party word processing program which was integrated into our Gemini Job Cost Accounting program for Lien Waiver maintenance beginning with version 19/2009. When you upgrade from any Gemini version 18 or earlier to any Gemini version 20XX (versions 2009 and later) and your data is converted, your lien waivers will no longer exist as printable documents until they are manually converted to TxText document format. The end result of the conversion is that you will be able to insert a company logo, use different text fonts and colors, bolding, and so on, in your Lien Waivers.

Although you can add non-Lien Waiver folders and use TxText to create standard business and other documents as desired, the following information details the quickest and easiest method of converting your "old" lien waivers to the new TxText format. It is the only subject we will address in this document.

#### ASSUMPTIONS:

- a. You have upgraded from Gemini version 18 or earlier to version 20XX and you are presently logged into a company whose data has been converted to the newer Gemini 20XX format.
- b. Even if you don't have Supervisor user access, you at least have JC Job List Maintenance security access.
- c. You need both Partial and Final Lien Waiver documents for each of your waivers.

1. If you **ARE NOT** signed in as Supervisor, select **JC | Job List Maintenance**, highlight any job, and then select **Change**. On the **Additional** tab, click on the ellipsis box to the right of the **Lien** field to display the **Lien Waivers** browser list. It's okay if the Lien field is blank.

2. If you **ARE** signed in as Supervisor, select **File | Supervisor | Job Costing | JC Lien Waiver** to display the **Lien Waivers** browser list.

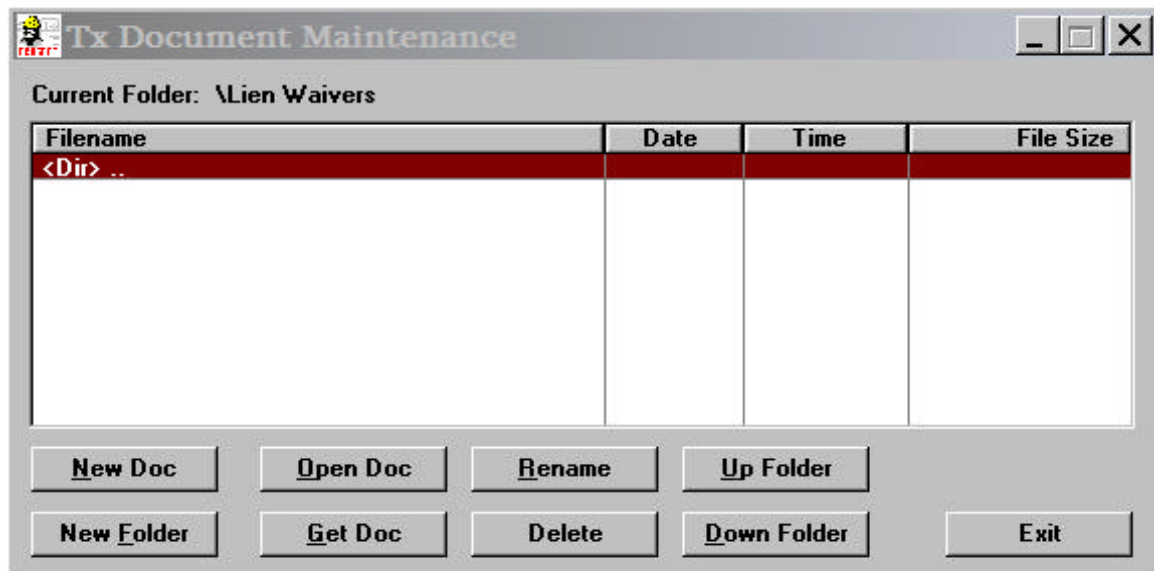
3. Highlight the first Lien Waiver to be updated and select **Change** to display it. We recommend you make note of the Lien Waiver number (1-999) you will be converting.

a. Using either your mouse or your keyboard <Shift> key and either the <Page Down> or the <Down> and <Right> Arrow keys, highlight the lien waiver text all the way to the bottom of the document. Any lien waiver text "below" the bottom of the window will be forced up as it's highlighted.

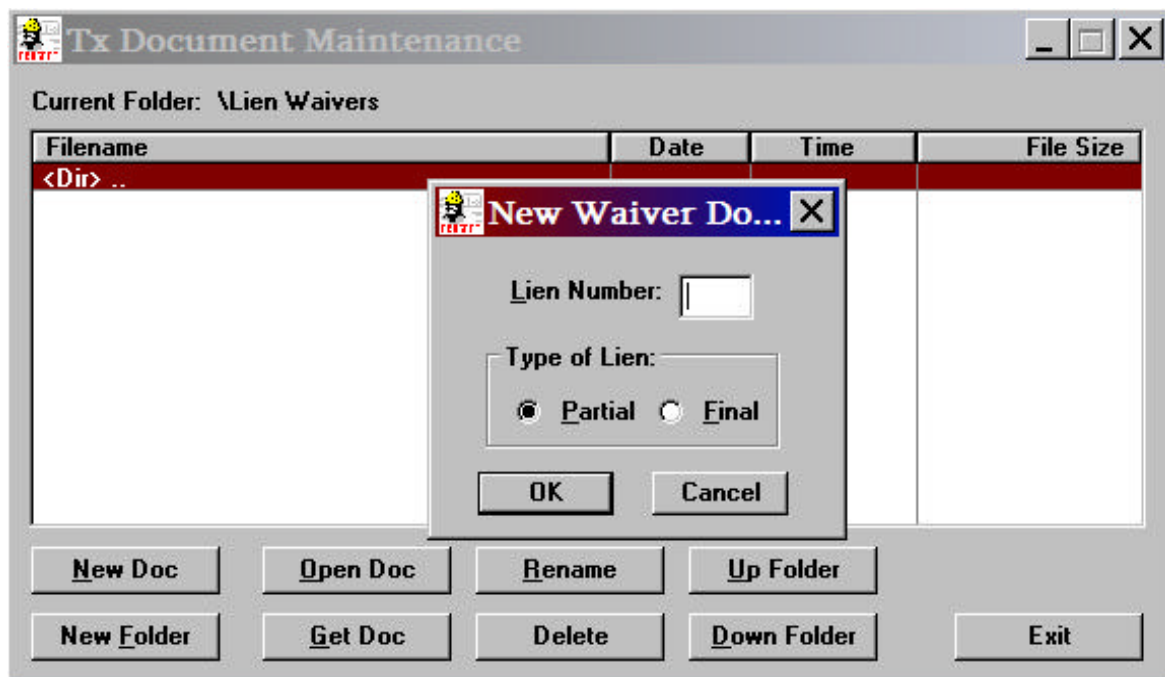
b. Either select **CTRL-C** on your keyboard or *right-click* your mouse anywhere on the lien waiver text window to display a drop-down menu from which you can select the **Copy** option.

c. Select **Cancel/Close** as necessary to return to the main Gemini window. **DO NOT** delete the existing Lien Waiver document.

4. Select **File | TxText Maintenance | Down Folder** to display the **Tx Document Maintenance** window shown below. Depending on your system, it may take a few moments for Gemini to display the first TxText menu the very first time you access TxText Maintenance.



5. When the above window appears, select the **New Doc** button to display the **New Waiver Document** window, below.



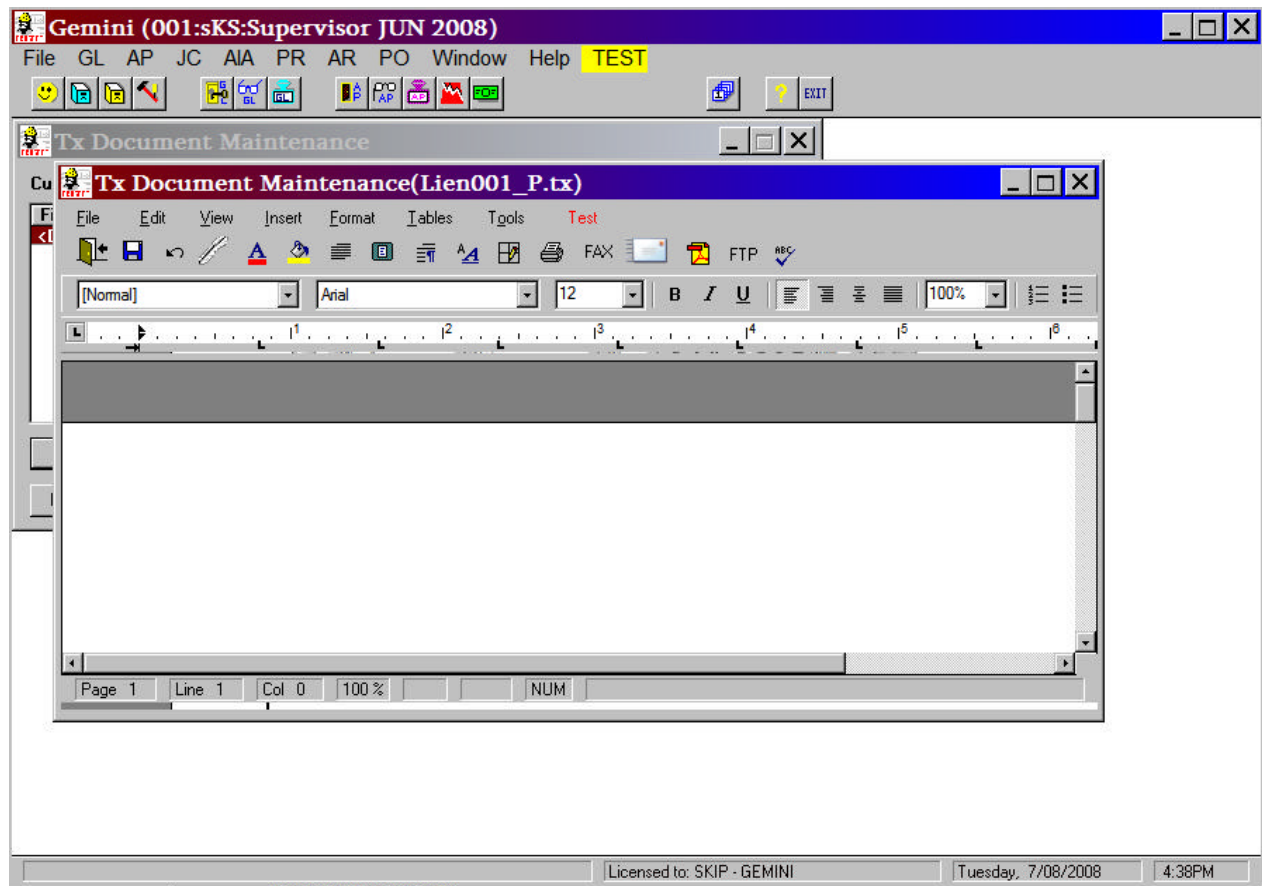
**WARNING:** This is a *critical* step in the creation of your lien waivers. If the TxText Document Maintenance window (as shown in Step 6, below) appears *instead of the New*

**Waiver Document** window, above, **STOP NOW!** Exit back to the main Gemini window and retrace your activities beginning with step 4, above, to insure you've correctly followed instructions.

Why? At this point, you *could* save TxText Lien Waiver documents in a different TxDocs folder but, if you did, Gemini would **NOT** use them. Lien Waivers **MUST** be in the specified folder **AND** they **MUST** follow our internal naming convention (**LienNNN\_P.tx** for **Partial** waivers and **LienNNN\_F.tx** for **Final** waivers where **NNN** = waiver number 001 to 999), **AND** the waiver number **MUST** be the same for both documents.

6. On the **New Waiver Document** window, enter the lien number you are converting in the **Lien Number** field (it will accept lien numbers from 1 through 999), specify whether it is a **Partial** or **Final** lien document, and, if you are satisfied with your choices, click on **OK** to accept.

Regardless of which document *type* you select for creation, Partial or Final, a minimized Tx Document Maintenance window similar to the one shown, below, should appear. For convenience and ease of use, we recommend you click on the document window's *maximize* button in the upper-right corner of the window:



7. From this point on, unless otherwise noted, TxText command button references (File, Edit, View, and so on and the row of command button icons) pertain specifically to the **Tx Document Maintenance (...)** window located immediately *below* the main Gemini command buttons.

a. Click anywhere in the white text area of the TxText Document Maintenance window--a flashing cursor will appear at the upper-left side of the blank document.

b. Either use your mouse to select **Edit | Paste** from the TxText command button bar or select **CTRL-V** on your keyboard to paste your Lien Waiver text into your new document.

c. Select **File | Save** to save the file. Even though it's unusable at this point, you should now have a saved TxText copy of the original lien waiver. It's unedited "boilerplate" text as well as pre-Gemini 20XX tokens should be displayed in your TxText Document Maintenance window. You are now ready to begin editing.

**NOTE:** If you have other Lien Waivers you need to convert, you can complete Steps 1 through 7 for each of them now or you can copy, paste, and edit them later at your convenience.

8. **Editing the Lien Waiver:** Please refer to the *Lien Waiver Token Conversion Chart* at the end of this document for help with converting old tokens to new. Please remember that, at this time, we are only interested in quickly creating and converting your version 18 and earlier Lien Waivers. Text can be edited and enhanced at a later time. Also, since you will now have separate Partial and Final Lien Waiver documents, each can be completely changed to be more specific for the type waiver being printed.

a. As you review the existing document, you will note that the "old" lien tokens are easy to recognize because they begin with two dollar signs (\$\$). For example, your company name would be represented by the old token, "\$\$CNAME".

b. Place the your mouse cursor immediately to the left of the first dollar sign of an old token. For example purposes, let's assume you are replacing the old \$\$CNAME token. Now, please refer to Attachment 1. In the **V18 AND EARLIER TOKEN** column, find the \$\$CNAME token. To the left of it, the new replacement token, «CoName», will be shown in the **V20XX TOKEN** column.

c. Either click on the "Feather" command button above the text box or select **Insert | Insert Token**. The **Please select token to use** browser window containing all the Lien Waiver tokens will appear.

**WARNING:** The next step is *critical* to the correct conversion of your lien waivers. Tokens must be *inserted -- NOT typed in*. If they are *typed* in, they **will NOT** work.

d. Locate and highlight the new token--CoName or **Company Name** in this example--and either double-click on it or select/click on the **Select** button at the bottom of the browser window to *insert* the new token into the document. In this example, if you inserted the new «CoName» token correctly, the text would actually appear as «CoName»\$\$CNAME in the document.

#### **TXTEXT TOKEN EDITING NOTES:**

1. For users familiar with text overwriting functions in word processing and other programs, there's no need to highlight text to be replaced by a token--the overwrite function will not work. When you insert a token, if any existing text is to be replaced by it, the text is merely pushed to the right when the token is inserted; *whether it is highlighted or not*.

2. If you accidentally select the wrong token and wish to delete it, you *must* use your mouse cursor to “hover” over the unwanted token until the cursor changes to a small “Up Arrow”. You can then *double-click* on the token to activate a popup menu from which you can select an option to delete it.

e. If you are satisfied that you have selected the correct replacement token, simply edit and delete the old **\$\$\$NAME** portion of the text. In our example, when you are finished, you are left with the token «**CoName**». We recommend you not delete an old "\$\$" token until after you have inserted its replacement.

f. You may have been using the old **\$\$\$STATUS\Partial\Final** token in the Lien Waiver document title and, perhaps, using it in the body of the text. There is no replacement for it because the document itself is now either the Partial or Final document type. Be sure to delete the portion of the token you don't need for the document title you are currently editing. For example, a common Lien Waiver document title is "**\$\$\$STATUS\Partial\Final** Affidavit and Waiver of Lien". If you are creating a "Partial" lien waiver, simply edit the title so that it reads "Partial Affidavit and Waiver of Lien".

g. Go through your document and replace all the old “\$\$\$...” tokens with the new ones. If you aren't sure if all the old tokens have been found and replaced, move the text cursor to the top left corner of the first page of the document. Select **Edit | Search** to display the **Find** window. Enter \$\$ in the **Find what** field and select **Find Next**. If there are any more old tokens left in the document, the Find option should locate them.

h. When you've finished updating the Lien Waiver document with all the new tokens and are satisfied that it reads correctly for the type document it is (Partial or Final), select **File | Save** to save the document.

i. Immediately after the document has been saved, Select **File | Save As**. In the **File name** field at the bottom of the file maintenance window, edit the file name to save the document as the other required document (Partial or Final). For example, if the existing filename were **Lien001\_P.tx**, you would change it to be **Lien001\_F.tx**. Edit the document title (as explained in 8f, above) and other text as necessary to be sure it agrees with the *type* document you are working on (Partial or Final). Use the **Edit | Search | Find** option if necessary to locate and change text as needed. When finished, select **Save** to save the new document and return to the TxText window.

9. Up through Gemini version 18, each Gemini company had it's own separate lien waivers and often used the same Lien Waiver number in each company. Some users never used the company tokens to extract company information from the company's database. Company names were manually typed in for each company. In Gemini 20XX, any Lien Waivers in the Lien Waiver folder are, essentially, master documents used for *all* companies. If you have this situation in your system, you may wish to contact Prosoft Support for assistance.

10. If you have additional Lien Waiver documents that need to be updated and have not already copied and saved them in TxText, please repeat Steps 3 through 8 for each remaining Lien Waiver until you have converted all of them.

If you have already copied and saved them in TxText without updating the tokens, select **File | TxText Maintenance** to display the **Tx Document Maintenance** window. Either double-click on the **Lien Waivers** folder or highlight it and click on the **Down Folder** button to display all the Lien

Waiver documents. Either double-click on the appropriate Lien Waiver or highlight it and click on the **Open Doc** button to display and edit it. Repeat Step 8, above, to update the document tokens and save the corrected document.

11. Congratulations! You have completed updating your Partial and Final Lien Waiver documents. Now they can be edited to enhance their appearance at your convenience. Please refer to either the TxText Maintenance section of your manual or online Help function for further assistance as needed.

### Lien Waiver Token Conversion Chart

**CONVERSION CHART NOTES:**

1. There is no equivalent replacement for the old **\$\$STATUS\Partial\Final** token. In previous versions, it was used to determine the *type* of waiver to use, Partial or Final. In Gemini 20XX, the document filename tells Gemini whether it is a Partial or Final waiver.
2. The **\$\$REQWAIVER\Prefix\Suffix** token has been replaced by the new token **<<WLReq>>**. If you are using this token, you must be able to log in as supervisor to finish setting it up. Select **File | Supervisor | Configuration | AP Adtl** to enter the equivalent **Prefix** and **Suffix** text used in earlier waivers in the **Lien Token “WLReq”** box at the bottom of the AP Adtl tab.

**NOTE:** If you are already logged in as supervisor, you don't need to close the TxText Document window to access the **AP Adtl** tab.

- A. Information extracted from your operating system's date and time function.
- B. Information extracted from Gemini's company configuration information (File | Supervisor | Configuration).
- C. Information extracted from vendor file records (AP | Vendor List Maintenance).
- D. Information extracted from Lien Waiver file(s) created during the check writing function.
- E. Tokens annotated with this Note (E) CANNOT be used concurrently with the **Waiver List of Jobs/«WLJobList»** token (see Note F, below).
- F. When used, the **Waiver List of Jobs/«WLJobList»** token can only be used by itself. None of the tokens annotated with Note E, above, can be used concurrently with it.
- G. Information extracted from job header records.

SEE  
NOTE

<u>ABOVE</u>	<u>WAIVER TOKEN DESCRIPTION</u>	<u>V20XX TOKEN</u>	<u>V18 AND EARLIER TOKEN</u>
1	Conditional on Status	- - - - -	\$\$STATUS\Partial\Final\
A	Current Date when printed	«DatePrinted»	- - - - -
A	Current Time when printed	«TimePrinted»	- - - - -
B	Company Name	«CoName»	\$\$CNAME
B	Company Address	«CoAddr»	\$\$CADDR
B	Company City	«CoCity»	- - - - -
B	Company State	«CoState»	- - - - -
B	Company Zip	«CoZip»	- - - - -
B	Company City, State Zip	«CoCSZ»	\$\$CCSZ
B	Company Phone	«CoPhone»	- - - - -

B	Company Fax	«CoFAX»	- - - - -
B	Company Email	«CoEMail»	- - - - -
C	Vendor Number	«VenAN»	\$\$VNUM
C	Vendor Name	«VenName»	\$\$VNAME
C	Vendor DBA Name	«VenDBAName»	- - - - -
C	Vendor Contact	«VenContact»	- - - - -
C	Vendor Street	«VenStreet»	\$\$VADDR
C	Vendor Street 2	«VenStreet2»	- - - - -
C	Vendor City	«VenCity»	- - - - -
C	Vendor State	«VenState»	- - - - -
C	Vendor Zip Code	«VenZipCode»	- - - - -
C	Vendor City,State Zip	«VenCSZ»	\$\$VCSZ
C	Vendor Email	«VenEMail»	- - - - -
C	Vendor Phone	«VenPhone»	- - - - -
C	Vendor FAX	«VenFAX»	- - - - -
C	Vendor Worker Comp Expires	«VenWCExp»	- - - - -
C	Vendor Insurance Expires	«VenInsurExp»	- - - - -
C	License Number	«VenLicense»	- - - - -
C	Vendor License Expires	«VenLicenseExp»	- - - - -
C	User Defined 1 Entry	«VenUser1Entry»	- - - - -
C	User Defined 1 Date	«VenUser1Date»	- - - - -
C	User Defined 2 Entry	«VenUser2Entry»	- - - - -
C	User Defined 2 Date	«VenUser2Date»	- - - - -
C	User Defined 3 Entry	«VenUser3Entry»	- - - - -
C	User Defined 3 Date	«VenUser3Date»	- - - - -
DE	Waiver Check Number	«WLCkNum»	\$\$CKNUM
DE	Waiver Check Date	«WLCkDate»	\$\$CKDATE
DE	Waiver Check Amount	«WLCkAmt»	\$\$AMT
2DE	Waiver Requirement	«WLReq»	- - - - -
2	Additional Waiver Required	- - - - -	\$\$REQWAIVER\Prefix\Suffix\
DF	Waiver List of Jobs	«WLJobList»	\$\$JOBLIST1
G	Job Number	«JobNum»	\$\$JN
G	Job Description	«JobDesc»	\$\$JOBDESC
G	Job Legal	«JobLegal»	\$\$LEGAL
G	Job Lien County	«JobLienCounty»	\$\$COUNTY
G	Job Lien State	«JobLienState»	\$\$STATE
G	Job Address	«JobAddr»	\$\$JOBADDR
G	Job City/State/Zip	«JobCSZ»	\$\$JOBCSZ