

# ECLARE VER 12 CHANGES

## General

The purpose of this document is to draw attention to the areas of the program that have substantial changes. Additionally to depict by menu option side effects of the change / enhancement.

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### FAX SUPPORT <SR2406>

Added support to FAX any report in the program. This requires setting up a FAX Server (supplied with this program). Auto Faxing is also support in selected areas in Gemini and PSClient. Once the FAX Server is installed and the program is properly configured, to FAX a report, you must preview it first. At the preview window along the top there is a button marked FAX. Select fax and enter in the required information. If the FAX button is dimmed out, then the program is not properly configured.

#### File | Exchange | Update Vendor / Cost Code

- Added support for Auto Fax field in vendor.

#### File | Import | Import Vendor

- Added support for import of FAX # & Auto Fax.

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### REMAP KEYPAD "+" AS TAB KEY <SR2407>

Added the ability to remap the "+" key on the keypad for act like a TAB key.

#### File | Terminal Setup

- Added new "Plus Tab" key option to window.

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### EXCEL INTERFACE <SR2732>

Added interface support for Microsoft Excel. This simply calls Excel up and passes the filename of the last file that was exported from Eclare during this run. If nothing has been exported since the program has been started, then Excel will be called with no file given. Note that "Exchange" is not considered to be an export for this option. To use this, you must define the full location of Microsoft Excel in the File | Terminal option.

#### File | Terminal

- Added "Excel Program" to window,

#### File | Excel Launch

- New option to launch Excel and the last "exported" file during current program run.

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### EXPAND VENDOR PRICING TO ALLOW MULTIPLE PRICES <SR2562>

Expanded the Vendor Pricing to allow up to four prices along with an effective date instead of just a single price. When a job is repriced, the user has the option of selecting the date to be priced as of and the program will use the appropriate price. The program uses the closest effective date that is on or prior to the job price date. If none of the prices have an effective date prior to the job date, then the earliest available date is used.

#### Notes:

1. The Job header will show the last "Repriced Date".
2. If partial price update (keeps old prices) is done, then the new item prices use the current job "Price Date" for the effective date.
3. This new pricing information would only be used when repricing a job. None of the other operations would be affected other than the master pricing list which would need to show the multiple pricing information.
4. When pricing a job, if requested date is prior to available pricing, the system will use the oldest price available.

#### **File | Supervisor | Global Job Maint | Job Pricing**

- Add "Price Date" to window for repricing information.

#### **Jobs | Pricing | Pricing**

- System will ask for date to be used for repricing.

#### **Jobs | Pricing | Pricing | Group**

- Uses the job header "Price Date" for pricing of new items.

#### **Maintenance | Master File | Vendors | Edit**

- Changed window for new pricing information.
- When price changes are made, the system will resequence the price information into proper date order when the record is saved. This order is from highest (latest) date to lowest (earliest) date.
- If a unit cost is entered without an effective date, when the OK button is pressed, it will display a message and require a date to be given. If that cost is no longer needed, the date must be cleared as well as the date.

#### **Maintenance | Master File | Vendors**

- Browse will show the "Current" price based on the user login date.

#### **Maintenance | Price Update**

- On browse screen, added "Effective Date" to be used for display & new added prices.
- Cost column will show single price that is effective as of "Effective Date".
- Change button now brings up a popup window instead of using in-line editing.
- The "Effective Date" is the date from the browse window and is what will be used as the new cost effective date. If user wants a different date, they will need to change at browse window.
- The new cost will be placed in either an empty position if available, otherwise it will replace the oldest entry. Exception is if the new date is older than all existing dates, no new entry is made.
- If the cost is zero (or blank), then no new entry is made even if OK button is clicked.
- If another entry has same date as the new effective date, then a new entry will be added if the amount is different. If the amount is the same, no entry is made.
- When the new cost is accepted, the program will resort all of the entries as needed and put them into proper date order (high to low, or latest to earliest)

#### **Reports | Job Price Compare**

- Added new required field "Price Date" to report prompt. This is used to control which price is used for each vendor.

#### **Reports | Master File | Master File Report**

- Added required "Price Date" field, which is used to control the cost shown for the vendors.
- Changed internal logic to use Price Date information for the vendor cost.

#### **Reports | Master File | Item Part Number Ref**

- Added required "Price Date" field that is used to control vendor price shown.

**Reports | Vendor Related | Vendor Price Book**

- Added optional "Show Only Price Date". If given, only the single cost that would be used with that that Price Date is shown. If none is given, then all defined cost is shown.
- Moved "Updated" column to far right and recalled it "Effective". This now shows the effective date based on the vendor information.
- If all cost is shown (no Price Date given), then the additional lines will show only the cost & date.

**File | Export | Export Option Pricing**

- Added "Price Date" to browse list of jobs.
- Export uses whatever pricing is defined within the job export.

**File | Import | Import Vendor Pricing**

- Added required "Price Effective Date" which defaults to user login date. This is used as the effective date in the vendor price record.
- When new prices are imported, the oldest price is discarded and then the new price is added to one of the four buckets.
- If duplicate date and pricing information is found, no changes are made.
- If duplicate date but different pricing is found, a new entry will be added.

**File | Supervisor | Global File Maintenance | Vendor Price Export**

- Changed to export all prices & dates
- Export order is now: VendorID, Item #, Vendor Part #, Description, Purchase Unit, MinOrder, Increment Order, Cost1, Cost Date1, Cost2, Cost Date2, Cost3, CostDate3, Cost4, Cost Date4

**File | Supervisor | Global File Maintenance | Vendor Price Import**

- Changed import to handle new import order. See Vendor Price Export for values.

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**EXPORT COST CODE <SR2750>**

Changed the Eclare Export Cost Code option to include the new header "Cat. Closeout" if "Write Gemini Header" is selected. This does not change the actual detail information written by Eclare, only the header gets changed. The reason for this is that Gemini now imports this field as well and this will provide the proper header for those wanting to update all information before importing to Gemini.

**File | Export | Export Cost Codes**

- Added "Cat. Closeout" to "Gemini Header".

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**EXPORTED PO DESCRIPTIONS <SR2523>**

When exchanging or exporting PO's from Eclare to Gemini, have added the "PO Package Number Description" as the PO description in Gemini.

**File | Export | Export Job PO's**

- Removed old Procap / Gemini 9.1 support.
- Added "Ver 12" support for PO Pack Description.

**File | Jobs | Edit | Exchange**

- Changed to version 12 & added PO Pack Description.
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## **EXCHANGE MODEL PRICING INTERFACE BETWEEN ECLARE & PSCLIENT <SR2563>**

Added the ability to "Exchange" model pricing information between Eclare and PSClient directly through the exchange option. This utilizing new fields in the PSClient to do the cost to retail markups.

### **Notes:**

1. Percent Markup (n5.1) would be used to markup the Eclare Cost to determine the Retail Price.
2. Retail Rounding (n9.2) would determine the increment step of the retail price. For example, if this was entered as \$10.00, the resulting Retail Price would always be rounded to nearest \$10.
3. Old Retail price is saved during update.
4. In PSClient "Exchange Get Model Cost", if the option "Update Master Option Cost Also" is checked, then the related Master Option Cost will be updated as well as the Model Pricing.

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## **JOB COST CODE ADJUSTMENTS <SR2285>**

Added a new tab called "Adjustments" to the Job Header screen. This allows you to enter in Cost Code adjustments, which are added to the cost codes when they are exported to Gemini or other programs. Normally these adjustments would be Revenue Items, but they can also be made to expense cost codes as well.

### **File | Export | Export Job Budgets**

- Added support for "Job Budget Adjustments".

### **File | Export | Export Cost Code Compare**

- Added support for "Job Budget Adjustments".

### **Jobs | Edit**

- Added "Adjustment" tab for Direct Budget Adjustment information.

### **Job | Edit | Exchange**

- Added support for "Adjustments" to budget section.

### **Jobs | Delete**

- Changed Delete Job to also remove new JOBADJ file.

### **Reports | Take Off Report**

- Added "Direct Budget Adjustment" Information to end of report.

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## **HIDE JOB CHECKBOX <SR2329>**

In the Job Header, added a new checkbox called "Hide Job". When checked, the job will not be listed in the browse list unless the "Show Hidden Jobs" is checked.

Note that the four Global Job Maintenance options (File | Supervisor | Global Job Maint) all INCLUDE the hidden jobs. There is no option to exclude hidden due to nature of there use.

### **Jobs | Job Maintenance**

- Added support for new "Hide Job" checkbox.

**File | Supervisor | Export | Export Option Pricing**

- Added support for new "Hide Job" checkbox.

**File | Supervisor | Global Job Maintenance | Job Pricing**

- Added support for new "Hide Job" checkbox.

**Reports | Job List**

- Added support for new "Hide Job" checkbox.

**Maintenance | Setup Maintenance | Show Item References**

- Added support for new "Hide Job" checkbox.

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**ECLARE CHECK LIST - TAKEOFF NOTES <SR2721>**

In the Check List browse list, added a "hot field" for the takeoff notes under the scroll window. This will show the notes of the takeoff line highlight in the browse list above it. This notes field is read only and does not allow changes.

**Jobs | Checklist Qty**

- Added "Notes" display to browse list.

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**ADDED 2nd ADDRESS LINE TO VENDOR <SR2682>**

Added a second address line to the vendor record.

**Maintenance | Vendors**

- Added 2nd address line to vendor screen.

**File | Import | Import Vendors**

- Added support for vendor 2nd address line.

**Reports | Vendor Orders**

- Added support for vendor 2nd address line.

**Reports | Vendor Related | Vendor Listings**

- Added support for vendor 2nd address line.

**File | Exchange | Update Vendor / Cost Code**

- Added support for vendor 2nd address line.

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**TAKEOFF DETAIL REPORT - ZERO ORDER QTY <SR2695>**

Changed handling of the detail line extension if the "Purchase Qty" is zero. In this case, the report will use the "Takeoff Qty" instead. This can occur when a line has a quantity, however the over all job quantity for that item is zero due to it being backed out elsewhere.

**Reports | Takeoff Report**

- Changed line price extension to handle zero Order Quantity.