

ECLARE VER 16 CHANGES

Important Notice

We are pleased to present several new features in Eclare version 16. Some of the new features are very powerful – and we strongly recommend training and a thorough review of the functionality in a “Play” database prior to actual utilization in your real company database.

Global Job Maintenance

Program(s): Eclare Software Report: 3440

Maintenance | Global Job Maintenance | Global Take-Off Maintenance

It is recommended that this feature is thoroughly reviewed in a “Play” database prior to utilization in your real company database.

The intent of this feature is to give the estimator the ability to make changes to multiple Model Templates – by copying those changes from a single template to a selection of (multiple) templates. This functionality existed to a limited extent in prior versions. This new feature allows a much more precise level of making global changes to multiple templates.

The Global Job Maintenance screen will allow changes to be made to all of the fields at either the Take-Off header area or the Take-Off detail area. As an example – you go update the P.O.Package field – on a single ITEM in a specific Take-Off Number across all model templates at once.

It is VERY IMPORTANT that you read and understand how to use this before attempting to update your live data. We strongly recommend using this in a play area until you are comfortable with what and how this works. Also, as with anytime you are updating a mass of information, backups are very strongly suggested before you start.

New User Security Level (Administrator)

Program(s): Eclare Software Report: 3440

File | Supervisor | User Maintenance

This new security level will allow users to limit access to the new Global Job Maintenance functionality. Due to the fact that this new Global Job Maintenance can be so powerful and make significant changes to many job/model templates at once – we decided to also add a new security level. It is intended that a select few individuals will have access to the Administrator level security. It is possible to log in as Administrator and perform certain global functions – while other users are logged in and using Eclare.

PO Price Book access - Non-Supervisor

Program(s): Eclare, Gemini Software Report: 3221
File | Export | Export Gemini Price Book

We have moved the PO Price Book export (Eclare) and import (Gemini) to menu locations where you do not need to be logged in as supervisor to access them.

Added the ability to have multiple contacts for each vendor

Program(s): PSClient, Eclare, Gemini Software Report: 3273
File | Supervisor | Company Maint
Maint | Vendor Maint.
Maint | Vendor Maint.
Reports | Vendor Related | Vend

The vendor file structure now allows multiple contact names each with their unique title, phone, fax, cell and email address.

Enhanced the Change Order Process

Program(s): Eclare, Gemini Software Report: 3373

This feature should be reviewed in conjunction with PSClient, Eclare and Gemini as the functionality is greatly improved in all applications.

Eclare

We have added a "Change Order" number in the Job Take-Off Header. This is used by several areas to allow you to control what is included in the exchange of the job to Gemini. It is possible to send only specific take-off's (those indicated with a Change Order number) into Gemini through the Exchange process.

Gemini

We have added a new checkbox "Update CO Budgets" in the Purchase Orders header that when checked will create a linked Change Order (JC; Change Orders). Committed cost will still be updated, but if you have the global "Orig. Budget Updated by POs" checked (File; Supervisor; Configuration) original budget will not be updated for that specific PO.

Job Take-Off Criteria

Program(s): Eclare Software Report: 3431
File | Supervisor | Set Up | Job Criteria (set up screen)
Jobs | Take Off | Change (at Take-Off header)

The Job Take-Off Criteria is a way to globally set each take-off at the take-off header level to an ALTERNATE or INCLUDE status. If a Take-Off header is set to ALTERNATE – the entire Take-Off will be ignored in terms of inclusion in the overall cost. This feature is designed to assist those builders that use Eclare to calculate the BASE HOUSE costs, as well as all of the OPTION costs on a particular model or plan, and additionally use this cost structure to update the Option costs in PSCient.

Typical Job Criteria set up could be:

Base House
Elevations
Area (Community)
Series (or other)

This structure will allow the user to print a take-off report – for Base House only – by setting the Job Take-Off Criteria to only base house. Additionally the builder could print a series of reports for a stated criteria – Base House – Elevation A. This feature will also allow the user to create a Pro-Forma estimate based on specific criteria.

Expanded the ITEM DESCRIPTION and Vendor Part DESCRIPTION Fields

Program(s): Eclare, Gemini Software Report: 3442
Maintenance | Master File | Insert or Change

We have expanded the description for the Item number and Vendor Part Number description in Eclare to 60 characters. Likewise, in Gemini the Purchase Order detail line description and the Price Book has also been expanded to 60 characters.

Job Comparison Report

Program(s): Eclare Software Report: 3443
Reports | Job Comparison Report

This report will now accept up to 9 vendors for comparison instead of just three and the information may be exported to a CSV file. Note that the 4th through 9th vendor selected will only be exported to the CSV file and will not appear on the report.

Pro Forma

Program(s): Eclare Software Report: 3444
Jobs | Pro Forma

This feature will allow a builder to generate What-if projections based on a set of stated criteria. The structure works in conjunction with the Job Take-Off Criteria. A builder can establish a table for a specific community and project costs at a model level and vendor level.

The builder can develop a table that depicts the expected build out for a specific community. As an example – if the community offers 5 different products (plans) and each with 3 elevations with a possible 500 lots; the table can be set up to depict the total expected sold volume of each plan and each elevation.

<u>Model Elevation</u>	<u>Qty</u>
Plan 1 A	20
Plan 1 B	20
Plan 1 C	30
Plan 2 A	50
Plan 2 B	70
Etc	

The results will produce a report and export file – with the total costs per plan, as well as the detail costs per vendor. It becomes an excellent tool to forecast and negotiate with potential vendors and subs.

Take-Off Types and the custom library

Program(s): Eclare Software Report: 3447
Jobs | Take Off | Change (at Take-Off header)
Reports | Take-Off Type Usage

We now have a globally defined "Takeoff Type" list that can be assigned in the job Takeoff Header. Using this, you can then limit the display of takeoffs in the "Jump" to takeoff window within the Job Takeoff screen.

When an estimator is developing a custom quote (example Master Bath in a specific plan), they can create the complete estimate in a single take-off and label the take-off with a "Take-Off Type = Master Bath". The take-off can then be stored in a single job (Custom Quote-Library Job). This allows the estimator to go back at any time – and review / filter / all of the previously completed custom quotes.

The next time a master bath is requested, the estimator can pull up the library job – and filter the Take-Off Type = Master Baths – and all of the previously completed Master Baths (and only the Master Baths) will show up in the Job Take-off screen. This will allow the estimator to review and select / copy a specific quote from an old job to a new job.

Additionally it is possible to report and quantify how many custom quotes are generated from a date – to – a date. This will assist the builder / estimator in the management of their Standard Options verses their Custom Options.

Have added an option to export the new Job Takeoff Criteria and Take-Off Type

Program(s): Eclare Software Report: 3466

File | Export | Export T/O Compare

This is an enhancement to the existing export feature. It now includes the selection for the new Take-Off Criteria and the Take-Off Type fields. This export functionality is designed to allow the builder to review (via export) all of the structural aspects of their take-offs. (Review all plans side by side, to insure consistency in how each template was built).

Item Custom Color

Program(s): Eclare Software Report: 3472

File | Terminal Set up (Custom Color configuration at each work station)

Maintenance | Master File | Insert / Change

We have expanded the "Item Custom Color" from one to three different colors. Also in the items where you before had a simple "Use Custom Color" choice, you may now select any of the three colors.

Exclude Alternate ITEMS

Program(s): Eclare Software Report: 3478

Reports | Take-off Detail Report

We have added a new option "Exclude Alternate Items" to the report. This allows you to exclude items that are marked as "Alternate" without the need to change the global configuration.

Duplicate Jobs and Reset OPTIONS to Alternate

Program(s): Eclare Software Report: 3479

Jobs | Duplicate Jobs

We have added a new option which will allow you to reset only "Alternate" status flags on items/assemblies that have an option number attached. The qty value will not be changed, the status will be set to "A".

New Exchange from PSClient to Eclare (Client-Job information)

Program(s): PSClient, Eclare Software Report: 3487

File | Supervisor | Company Maint

Clients | Edit Header | Exchange

PSClient now allows you to exchange a client's information to Eclare in multiple stages by using the new "Option Deadlines". Each time you Exchange in PSClient, you will be presented with a list of Option Deadlines and their current statuses.

If a builder's process requires additional time in the customer design area for the selection of upgrades and custom options, the builder can define the selection process in stages. An example would be the selection of all structural components (Stage 1) and then remaining selections (Stage 2).

Stage 1 selections can be processed through to the release of purchase orders even though Stage 2 selections are not completed in PSClient. The system will control the process and "lock" all standard options in the Stage 1 area – to prevent any changes at the client record.

Exception report – when option number is not found in Eclare

Program(s): Eclare Software Report: 3488

File | Exchange | Retrieve Jobs

When Exchanging a client's information from PSClient into Eclare – an exception list is presented – showing any option numbers that were NOT updated in the Eclare template. This operation has been changed to now show the option number exceptions to a preview window that you may print out for later reference.

Archiving Backups

Program(s): PSClient, Eclare, Gemini Software Report: 3523

File | Backup Company Data and Restore Company Data

Added the ability to set the number of backup files saved and restore from a choice of different backup files.

Cursor position at the Take-Off delete ITEM screen

Program(s): Eclare Software Report: 3605

Cosmetic - Changed cursor position to remain in same position when deleting within takeoffs.