

Summary Closing & Pipeline Report Enhancements

Program(s): PSClient Software Report: 4319

Clients | Insert/Change | Departments | Finance 2

Clients | Insert/Change | Schedule | Insert/Change | Additional | Link To | Construction Completed

Maintenance | Subdivision & Lots | Insert/Change | Budgets

Reports | Management | Summary Closing & Pipeline Report

Added a new "Exclude Spec Homes" checkbox to the report setup window and expanded the Pipeline Report to also tally "Completed" construction. This is based on a new date field in the Client Header Finance 2 tab which may also be linked to a Schedule Task for automatic update.

Copy Color Selections Window Enhancement

Program(s): PSClient Software Report: 4326

Maintenance | Color Choice | Copy Color Selections

Changed the characteristics of the Copy Color Selections window to allow it to be resized by the user.

Warranty Enhancement

Program(s): PSClient Software Report: 4385

Client | Transactions | Insert/Change | ToDo Type | W:Warranty

Maintenance | Administrator | Tx Document Maintenance | Warranties | Tokens

Reports | Warranty

Added a new "Exempt" checkbox to the client Warranty Transaction window which allows a warranty to be marked as Exempt (not the fault of the vendor). The information is then used to update the Warranty Request, Warranty Summary, and Warranty Activity reports. When unchecked, a new Warranty Activity report setup checkbox, "Include Exempt Warranties", allows the user to exclude those warranties marked "Exempt" to correctly denote that a vendor is not at fault.

A new token, "TxWExempt", has been added for use in warranty letters.

Transactions Browser Window Enhancement

Program(s): PSClient Software Report: 4441

Client | Transactions

Added the primary Co-Buyer name to the browser window (top left).

AP Vendor Expiration Report Enhancement

Program(s): PSClient, Gemini Software Report: 4450

AP | Reports | Vendor Reports | Vendor Expirations

Added a new "Expiration Earliest Date" filter field to the report. If a date is entered, the report will only show vendor expirations on or after the specified date.

Added Client First Name to ToDo Report

Program(s): PSClient Software Report: 4461

Reports | ToDo List

Added the client's first name to the ToDo report using the phone number checkbox option which has been changed to "Show First Name and Phone".

Contract Proofing Report Enhancement

Program(s): PSClient Software Report: 4488

Clients | Insert/Change | Model Options | Change | Notes

Clients | Insert/Change | Contract | Print Contract | Proofing Report

Added Client Notes to the Contract Proofing Report which will output any user-entered Model Option Notes.

Client Model Pricing Enhancement

Program(s): PSClient Software Report: 4494

File | User Maintenance | Insert/Change | Security 2

Clients | Change | Model Options | Reprice Model

Added a new "Reprice Model" button on the Client Header Model Options window. When the Reprice Model button is selected, a browser displays each included option with both current (client) and new price columns. Options eligible for repricing may be individually selected. An addendum is created by "saving" the contract to complete the transaction.

To access the new option, user's must have (new) "Reprice Client" security authority and the client must have a lot assigned on the Finance tab. New prices are extracted from updated Maintenance Master Option List, Subdivision & Lots, and Model options information.

Added Security for Client Status

Program(s): PSClient Software Report: 4508

File | User Maintenance | Client Status

File | Supervisor | Configuration | General Information

Added a new User Maintenance "Client Status" security tab which allows you to specify Client Status maintenance options for a given user. If an existing client's record has a status option which is not in a user's approved list, the Client Status pulldown will be disabled. If the existing client's status is in the approved list (or a new client is being added), then the Client Status pulldown will reflect only the user's approved status options.

Also added a new Configuration "Create Client Transaction on Status Change" checkbox which, when checked, will automatically create status change transaction records.

Vendor List Enhancement

Program(s): PSClient Software Report: 4523

Scheduling | Maintenance | Vendor List | Insert/Change

Clients | Insert/Change | Departments | Finance

Added a "Lender's Only" checkbox to the Vendor List browser header which can be used to restrict the vendor list to just those vendors marked as lenders for quicker selection. The Lender's Only checkbox can be changed on-the-fly when accessed through the Finance tab Construction or Permanent fields.

Vendors are designated as lenders using the Lender checkbox on the Vendor Maintenance General tab.

TxText Maintenance Enhancement

Program(s): PSClient, Eclare, Gemini Software Report: 4527

Eclare and Gemini: File | TxText Maintenance

PSClient: Maintenance | Administrator | TxDocument Maintenance

Added a new token, "VendorContacts" (txVendorContacts in PSClient), that allows pre-defined Vendor Contacts information to be output to TxText documents.

Print Vendor Letters Enhancement

Program(s): PSClient, Eclare, Gemini Software Report: 4528

Eclare: File | Print Vendor Letters

Gemini: File | Print Vendor Letters

AP | Reports | Print Wavier of Lien

Added new logic to handle repetitive user-entered values for multiple tags at report runtime. Runtime user entry fields are created in TxText documents using the File | TxText Maintenance | New Doc/Open Doc | Insert | User Entry option.

TxText Warranty Documents

Program(s): PSClient Software Report: 4529

Client | Transactions | Insert/Change | Print Letter

Changed the program to automatically default to the TxText "Warranties" folder if the current client transaction ToDo Type is Warranty. Once the appropriate Warranty TxText document has been selected, if it is saved, it will still be saved in the Letters folder as before.

Access to Vendors in Transactions

Program(s): PSClient Software Report: 4538

Clients | Transactions | Insert/Change

Added a new "R: Request" fixed Client ToDo Type Transaction which behaves the same as other user defined types except that a Vendor may be selected as part of the transaction creation. It's purpose is to allow a vendor that relates to the transaction type to be selected so that related TxText tokens are available when printing.

Client Purge Date

Program(s): PSClient Software Report: 4554

File | Supervisor | Configuration | General Information tab

Clients | Insert/Change | Add'tl General tab

File | Supervisor | Remove Old Clients

Added two new fields, a "Days Before "X" Client is Purged" on the Configuraiton General Information tab and a "Purge Date" field on the Clients Add'tl General tab. When a client's status is changed to "X", the purge date will automatically be set to the current date plus the number of days, if any, entered in the 'purge days' field.

The Purge Date is subsequently used in conjunction with the Purge Through Date field in the Remove Old Clients option. The underlying concept is that client history can be maintained for a given minimum period of time before it is deleted.

Expanded Check for Duplicates

Program(s): PSClient Software Report: 4555

Maintenance | Administrator | Check Duplicates

Added a new client Duplicate Check option, "One Client Only (Name, Co-Buyer and Phone)", designed to see if a specific client has any other duplicates. Both the Client's and the Co-Buyer's last names are cross-checked against each other as well as Phone1.

Contract Addendums

Program(s): PSClient Software Report: 4563

Clients | Insert/Change | Departments | Finance tab

Clients | Insert/Change | Contract tab | Version

Added a new "Addendum Base" option on the Finance Tab. When the new "Set Base" button is selected, you may select which Addendum number should be considered to be base or zero. Once selected, the Base Addendum will subsequently be reflected on the Contract Proofing Report and will also be available as a new "AddendumAdj" TxText token.

NOTE: To be able to save a new Addendum Base choice, you must first save the client record at the prior window.

Maintenance | Administrator | Transfer Client Information

Program(s): PSClient Software Report: 4635

Added a new option, "Omit "Visit" Client Transaction Detail" to the Items to Copy box. When checked, no "V" records will be copied during Client information transfer.

Import Model Pricing - Update Color Only

Program(s): PSClient Software Report: 4639

File | Supervisor | Import | Import Model Option Pricing

Added a new check box option, "Update Color Codes Only (No Price Updates)" to the option setup window. When checked, NO PRICING IS UPDATED during data import. The purpose of the new option is to allow color selection information to be quickly updated without affecting pricing.

Relocate Program .INI File Location

Program(s): PSClient, Eclare, Gemini Software Report: 4656

Changed the Eclare, Gemini, and PSClient initialization (.INI) file default location to be the user's Documents and Settings folder. For example, C:\Documents and Settings\User Name\My Documents\Prosoft\Gemini.INI. The change will improve Prosoft's program compatibility with Windows XP*, Vista*, and the newer Version 7* (tentatively scheduled for release in October 2009) Operating Systems.

*Windows, XP, Vista, and Windows Version 7 are trademarks/registered trademarks of the Microsoft Corporation, Redmond, WA.

Corrected "Other Contingency Reason" Data Type

Program(s): PSClient Software Report: 4658

***** POST-RELEASE PROGRAM CHANGE/UPDATE *****
***** Program Version: 2010.00 Released: 18 Sep 09 *****

Clients | Transactions | Client Header | Departments | Finance | Contingency, Reason
Reports | Client Profile Report
Reports | Client Profile Report | Export

Corrected the "Other Contingency Reason" field type in the intermediate data file FLATFILE.TPS. The field data type was changed from date to string to correct the Reason field output.

Data Conversion Call Correction

Program(s): PSClient, Eclare, Gemini Software Report: 4660

***** POST-RELEASE PROGRAM CHANGE/UPDATE *****
***** Program Version: 2010.01 Released: 1 Oct 09 *****

Eclare, Gemini, PSClient

Corrected the single company Data Conversion call from the affected program to properly handle file pathing on some computers when the path contains blank spaces.

Add Initialization File Location to Program "Target" Path

Program(s): PSClient, Eclare, Gemini Software Report: 4666

***** POST-RELEASE PROGRAM CHANGE/UPDATE *****
***** Program Version: 2010.01 Released: 21 Oct 09 *****

Eclare, Gemini, PSClient Programs

Added a new "INIPATH" call that checks the program's desktop icon "Target" field for it's initialization file (Eclare.INI, Gemini.INI, or PSClient.INI) location during program launch. Required for some network installations, if "INIPATH" is present in the Target line, the specified .INI file location will override the program's default location.

The initialization file should normally be located on the user's C drive. When required, the "INIPATH" call is entered after the program's launch command. It must be enclosed within paired quotation marks (" "), must be followed by an equal (=) sign, and cannot contain a space immediately before or after the equal sign. For example, assume a Gemini program is located on network drive P in a folder named Gemini and that you have a C drive but your network is set up to use a common network user folder. To have Gemini access it's .INI file in a folder named ProsoftINI on your C drive, the Target field in your Gemini desktop icon would be changed to read, "P:\Gemini\Gemini.EXE" "INIPATH=C:\ProsoftINI".

Changed Data Transfer and FTP Communications Protocol

Program(s): PSClient, Eclare, Gemini, Other Software Report: 4668

***** POST-RELEASE PROGRAM CHANGE/UPDATE *****
***** Program Version: 2010.02 Released: 21 Oct 09 *****

Eclare, Gemini, PSClient Programs

File | Backup Company Data | Send to Prosoft
File | Supervisor | Restore Company Data | Retrieve from Prosoft
Help | Check for Updates
Help | Prosoft Server

PSFTPClient Program (Located on Prosoftinc.com Website)

Changed internal PSLink communications program to access our server(s) through our web address instead of a hard-coded, fixed IP address. It will allow us to change ISPs or otherwise move and/or update our communications server(s) as needed without having to change our programs to accomodate fixed IP address changes.