PSCLIENT ver. 12.00

Best Printed with margins
Left 1.25   Right 1.25

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) in order to utilize this feature. Auto Faxing is also support in a few selected areas of Gemini and PSClient were it makes sense. Once the FAX Server is installed and the program is properly configured, to FAX a report, select the preview. At the preview window along the top there is a button marked FAX. Click on this and then enter in the required information as to where to fax it. If the FAX button is dimmed out, then the program is not properly configured.

Maintenance | Vendor List

- Added "Auto Fax" fields to window.

File | Supervisor | Import | Import Vendor

- Added FAX and FaxAuto to fields imported.

File | Exchange | Update Vendor / Cost Codes

- Added "FaxAuto" field to exchange vendor import.

Reports | Setup Reports | Vendors List

- Added "Fax Auto" values to report.

Scheduling | Trade Contractor Projection

- Add "multi-fax" support to report.

Reports | Warranty | Warranty Request

- Add "multi-fax" support to report.

==

PDA SUPPORT OPTION <SR2542>

The program can now interface with PDA's allowing the supervisor to take the client job schedules with them into the field. There, they can update a task status, start date, end date and approve payment. Upon return to the office, the updated field information is then uploaded to PSClient. Note that this is an optional feature. Contact Prosoft at (813) 626-8778 or your sales representative for more details and pricing.

Maintenance | Vendor List

- Added new "Export to PDA" checkbox.

Maintenance | Supervisors

- Added new "PDAPath" variable to window.

Client | Edit | Schedule Tab | Edit Task

- Added new "Approved for Payment" checkbox.

Reports | Setup Reports | Superintendents
- Added "PDA Data Path" variable to report.

Schedule | Superintendent Maintenance
- Added "PDA Data Path" variable to window.

Scheduling | Detail Job Schedule Report
- Added "Approved" column to report.

PDA
- Wrote program to handle PDA side of operations.

==
PDA/SCHEDULE ALERT <SR2687>

Have added a checkbox "Alert Task" in the Client Schedule ToDo Task. This field is also available and can be updated on the PDA. When checked, this task will appear on a new report "Scheduling | Print Task Alerts". This can be used as a way to alert or notify the main office from the field of something that needs attention.

Client | Header | Schedule Tab
- Added new "Task Alert" column to browse.

Client | Header | Schedule Tab | Edit
- Added new "Task Alert" checkbox to window.

Scheduling | Detail Job Schedule Report
- Added new "Task Alert" field to report.

PDA Link
- Added support for new "AlertFlag" (Task Alert) field.

Scheduling | Print Task Alerts
- New report that prints task that are marked as alerted.

==
EXCEL INTERFACE SUPPORT <SR2287>

Added interface support for Microsoft Excel. This simply calls Excel passing the filename of the last file that was exported from PSClient during this run. If nothing has been exported since the program has been started, then Excel will open 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.

==
CLIENT NAME & ASSIGNED LOTS <SR2592>

Changed a number of reports to prefix the client name with the "Assigned Lot" if one existed. This was done because many people know property by lot numbers and not who has bought it.

==

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 utilizes new fields in PSClient to do the cost of retail markups.

Notes:

1. Percent Markup (n5.1) that would be used to markup the Eclare Cost to determine the Retail Price.

2. Retail Rounding (n9.2) that 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. Need to save Old Retail price when updating.

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.

File | Exchange | Retrieve Option Pricing

- New Option
- Program operates in two steps:
    1. The first is a "Proofing" report that shows what will happen but does not actually changing anything.
    2. The second applies the changes but does not print the report again.
- If more than one "Eclare Model Option Price" file exist, this will process each one in date/time order.

Maintenance | Master Option List | Edit

- Added new fields to the window.

Maintenance | Models | Edit | Edit

- Added new fields to the window.

Reports | Setup Reports | Master Model Report

- Added new fields to the report.

Reports | Setup Reports | Master Option Report

- Added new fields to the report.

==

FIELD APPROVAL (PSClient/Gemini) <SR2534>

Added the ability to do "Field Approval" for invoice payments in Gemini by allowing supervisor to mark which jobs/task have been completed. This can be accomplished by using a PDA in the field or directly by entering the information in the client schedule.

NEED MORE EXPLANATION

File | Supervisor | Company Maint

- Updated "Copy Company" for new CPAYCODE file.

File | Exchange | Update Vendors

- Updated this routine to include getting "PayCode" information from Gemini.

File | Exchange | Send Scheduling Approvals

- New Option to send Scheduling Pay Code Approvals and Ending Dates to Gemini.
- If multiple task have the same paycode, the earliest ending date is used and if any task is marked approved, the paycode is approved.
- Jobs (client) are excluded that are marked "X", "Delivered", "Deleted" or not assigned superintendent.

Client | Header | Schedule Tab

- Added "Approved" status to schedule browse list. Codes are as follows, Y=Approved; N=Not Appoved w/pay code; BLANK=No Paycode, not approved

Client | Header | Schedule Tab | Edit Task

- Added new "Pay Code" field to window.
- New "Approved" field already exist from PDA change.

Client | Header | Schedule Tab | Load Schedule

- Modified to copy new Pay Code field from Master Task list to client list.

Scheduling | Master Schedule List Maintenance | Schedule | Edit

- Added new optional "Pay Code" field to window. Linked to CPAYCODE.

Scheduling | Setup Reports | Master Schedule Report

- Added new "Pay Code" field to report.

==

EXPORT/IMPORT MODEL PRICING <SR2564>

Added the ability for PSClient to export to spreadsheet the model pricing information and then later import that same information back in.

File | Supervisor | Import | Import Model Options

- Add two new fields to end of line. (Exchange Markup % and Exchange Rounding)
- Update "Import Order" popup for new fields.

File | Supervisor | Import | Import Model Pricing

- Added 4 new column to import. (Default Qty, Override Master, Exchange Markup % and Rounding). The "Default Qty" was added due to use of this for file building.
- Updated "Import Order" with new headers and field descriptions.
- Added checkbox "Do Not Update Extended Information". If checked, the program will not change the "Default Qty" and the three new exchange fields. This is to prevent overwriting or zeroing of this information by later price updates if this information is not present.

File | Supervisor | Export | Export Model Pricing to CSV

- New Option
- Import headers and order is the same as "Export Model Pricing".
- Browse list of models excludes models marked as "Deleted".
- User can mark which models to export.

==

CLIENT IMPORT - ADDED NEW FIELDS <SR2704>

Have updated Client Import to allow more information to be imported. If the headers are used, not all fields are required. It is recommend that a working file is made using the "Create Header" and then use that to build the information that will be imported.

File | Supervisor | Import | Import Client

- Added new import fields and updated "Create Header".

==

IMPORT CLIENT <SR2663>

Added a "Create Header" button on the Import Client option. When this is clicked, it will write to the specified import filename in the import header. This header contains the "ID" for all fields that are imported in the proper order.

File | Supervisor | Import | Import Client

- Added "Import Order" button to window.

==

MODEL OPTION GROUPING <SR2524>

In the Model Options, we have added several new features to assure that the proper combination of options are selected. The first is the new Option Type of "Assembly Header", if selected the program selects all options defined in the assembly list.

The second is the "Option Group" field and is defined in "Maintenance | Option Group Maintenance". It allow you to define how all items that share the same option group interact. Each group has two options that can be checked. If "At least one must be selected" is checked, then at least one of the options for the current model must be selected. If "Only one may be selected" is checked, then no more than one option may be selected. Selecting both will require that one and only one option be selected.
Note that the validation is only done when processing options. If the rules are changed after a client option has been selected, it will not be affected unless those options are edited again.

Client | Header Edit

- Added logic to support the new Assembly Type.
- If the header qty is non-zero, then all related options will be set to qty equal to Assembly qty and the price will be set to default retail. This will overwrite any other selections.
- If the header qty is zero, then all related options will be reset to zero regardless of previous values.
- Related options can be changed as desired (set or cleared) after Assembly Header has been set. However be aware as indicated above, changing the header will overwrite related options.
- Added new "GA" column to browse list on Model Tab. This will show an "A" if an option is an assembly header and a "G" if the option is a member of a group.
- Before "Print Contract" (Model Tab) is done, all group relations are checked.
- When an option is selected (model tab), if that option is part of a group that is marked as "Exclusive" and more than one option in that group has been selected, then the group error box will appear.
- When the client header is saved regardless if any options have been changed, all option group restrictions are checked and error box shown is needed.
- The Option Group Error box may be cancelled without correcting the restriction. However the next time the header is saved, it will continue reporting the error.
- Added "View" button to Model Tab that will show "Assembly List" for an assembly header or the Option Group List for an option that is related to a group. Note that the option group list can be used to select or unselect options within that group, however the assembly list is list only (no changes).

Maintenance | Option Group Maintenance

- New option for maintenance of "Option Groups" to be used with master option list.

Maintenance | Models

- Updated for new "A" (Assembly Header) type.

Reports | Setup Reports | Master Option

- Added new option to print related Assembly Detail to report prompts.

Reports | Setup Reports | Master Option Groups

- New report to print out the new Option Groups.
- Related Option only shows first part of description to save space.

Maintenance | Master Option List

- Added new Group Code field on edit window.
- Added new "Type" of "Assembly Header". When selected, the "Assembly List" button is active. Note that only "Standard" options can be added to an assembly list.

==

VENDOR ADDRESS <SR2683>

Expanded vendor address to include a 2nd address line.

File | Supervisor | Import | Import Vendors

- Added vendor 2nd address to import following original address.

Maintenance | Vendor List

- Added vendor 2nd address to edit window.

File | Exchange | Update Vendor/Paycodes

- Added support for 2nd address line in vendor.

Reports | Warranty | Warranty Request

- Added vendor 2nd address line support.

Reports | Setup | Master Vendor List

- Added vendor 2nd address to listing

Scheduling | Trade Contractor Projection

- Added vendor 2nd address line support.

==

LOT BROWSE LIST <SR2738>

On the Lot Browse list, added the client name if one is assigned to a given lot. This only applies to "Assigned Lot" on the client finance tab and not the "Quoted Lot".

Maintenance | Subdivisions/Lots

- Added client name if assigned to that lot.

==

FINANCE LOT PRICING CHANGES <SR2745>

Added a global configuration for "Model Include Lot". If checked, then the base lot price based on subdivision would be added to model price and shown as a single price. Any lot premium would still be shown individually.

Client | Edit

- Model Tab

- "Base Price" should also include Subdivision lot price if "Base Includes Lot" is selected otherwise it would be model base price only. This would need to use "client header" if appropriate.
- "$$SUB" detail line needs to show dollar amount in the browse list (not on detail form) that would be either Subdivision cost plus Lot Premium or just lot premium based on "Base Include Lot" switch.
- "Total Price" does not include "Custom Options"
- Added new fields to Finance tab. Would be filled in when the lot is first selected or when a new lot is selected. These would NOT change as the related reference amounts are changed but would require that the user alter the amounts manual if they want.

Client | Model Tab | Contract
- Update logic for both "Model Includes Lot" and "Finance Lot" pricing.

Maintenance | Client Profile Export Maintenance
- Updated to agree with changes needed to flat file for new fields.

Reports | Client Detail Report
- Updated report with the two new "Finance Lot" related amounts from the client header.

Reports | Client Proposal
- Added change for global "Model Includes Lot" option. If that is selected, then the "Base Price" has the "Lot Base Price" added to it and the standard lot line does not print.
- Change report to use the lot on the Finance Tab if given, instead of the currently used quoted lot.
- If Finance Lot is used, then the prices from the client header would be used instead of the reference Model/Subdivision prices.
- Shows warning if Financial Lot is selected, but goes ahead and uses that information.

Reports | Client Profile Report
- Need to update export portion to include the new Finance Lot client header dollar amounts.

==

OPTION PICTURES <SR2512>

Added the ability to have a picture related to an Master Option item that would be displayed on the option window in client header (Model Tab).

Notes:

1. The picture files must be located in the directory "Pictures" located under the program folder.

2. The picture filename must be named the same as the option number without any leading zeros. For example the image for option 1002 would be named "1002.jpg" or whatever the proper extension should be for the file type. (See next item for file types)

3. File types supported are: (listed order is from best file type to o.k.)
JPG JPEG (will work best)
GIF Graphic Interchange Format
PCX Paintbrush
WMF Windows metafile
BMP Bitmap

4. If more than one file type is in the directory, the program will use the first type found based on the order of the types listed above.

5. If no corresponding file is found for an option, the program will use "NotAvail.JPG" instead. This file must be named exactly as shown with the JPG extension. If this file does not exist, then the text message "Not Avail" will appear in the picture box on the window.

6. When the cursor is over an existing picture, the cursor will change to the zoom cursor. Double clicking on the image will open another larger window (resizable) showing just the picture.

Client | Edit Header | Model Tab | Edit Option

- Added Option Picture

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CLIENT HEADER MODEL TAB <SR2665>

Changed browse list to drop the "Retail Price" and add to the far right "Sold Price" column.

Client | Header | Model Tab

- Removed "Retail Column" and added "Extension" column.

==

NON-WORD BASED CONTRACT & CLIENT BASED NOTES <SR2733>

Added the ability to print a contract without using Microsoft Word. Although this does not have the format ability of Word, those that do not want to deal with MS Word may find this helpful. To use this, you need to define the Contract Text in "File | Supervisor | Contract Form Text". The defined forms will appear in the same "Contract" list as the standard MS Word documents except will be letter instead of a number.

Also added in the Client Model List, the ability to add a note of up to 500 characters for each option. This will be appended to the Option Description when it is printed.

File | Supervisor | Company Maint | Insert Company

- Added logic to copy new CCONTEXT file as needed.

File | Supervisor | Contract Form Text

- New option to maintain non-Word Contract.

Client | Model Tab | Print Contract

- Changed handler to call correct routine based on selected type.
- New print option to handle non-Word contract print.

Client | Model Tab | Edit Option

- Add new "Notes" (500 char) field to window.

Report | Print Customer Proposal

- Updated report to include new client option notes.

==

CLIENT MODEL TAB OPTION LIST <SR2738>

On the Client header Model Tab, added an option to jump to a specific option without having to page through the list to find it. To use, enter the desired option number in the field and then tab off of it.

Client | Model Tab

- Added an entry lookup for option number to top of window. The "entry" type lookup requires entering the desired number and then tabbing off the field.

==

LOAD MASTER TODO LIST - ASSIGN TODO BY <SR2396>

Added an optional "ToDo By" field to the Master ToDo List that allows you to pre-assign who is responsible for a given task. Also added the ability when loading the task, to specify a different ToDo user then the person actually loading the task.

When a task if loaded, it will be assigned to the user specified in the Master ToDo Task if given, otherwise it will use the user specified on the "Load Scheduled ToDo Task" window. If a Master ToDo Task has a user defined that is no longer valid (they have been deleted), then the program will treated it as if no user was specified.

Client | Transactions | Load ToDo's

- Add logic to load Master ToDo list "ToDo By" if given.

Maintenance | Scheduled ToDo Task

- Added "ToDo By" field to master list.

Reports | Setup Reports | Master ToDo Task List

- Added new "ToDo By" to report.

==

JOB ADDRESS ON CLIENT SCHEDULE TAB <SR2548>

When selecting the "Assigned Lot" on the Finance tab, the system will fill in the "Address" area with the Lot Address if no description exists, if one exists, it does not replace it.

Client | Change | Schedule Tab

- Job Address change from Lot Address if given.

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LOCK MODEL & OPTION SELECTIONS <SR2321>

Added a checkbox "Lock Model & Options" on the Finance Tab in the Client Header. When this is checked, it prevents users from changing either the model or selected options. Note that this will not prevent remote site changes that have already been made prior to receiving the update client information from the master site.

Clients | Edit | Finance tab

- Added "Lock Model & Options" checkbox to Finance tab.
- When above checkbox is checked, the model (Model Tab) can not be changed and the option window will open but will not allow any changes.

Clients | Edit | Options

- Added support for "Lock Model" checkbox in client header. See Client edit above.

==

CLIENT FINANCE WARRANTY PERIOD <SR2598>

Added "Warranty Ends" date in the client header on the Finance Tab. This information is used when entering Warranty request and printing Warranty Reports. See below for detail of the action in the various areas.

Clients | Client Header | Finance Tab

- Added "Warranty Ends" date field to Finance Tab.

Client | Transactions | Warranty Type

- Added "Close Date/Warranty Exp" to upper right of window above "Print" box. If Warranty Date is defined in client header, it will be shown otherwise Final Close Date is used if it is given. If neither date is given, then "No Close Date" is shown.
- Warranty Date information will show in red if expiration exceeds "Login Date" date, the remaining days will show in parenthesis.

Reports | Warranty | Warranty Request

- Changed form layout per request.

Reports | Warranty | Warranty Summary

- Added "Warranty Date" and "# Days" to report. The number of days is equal to Login Date minus Entry Date if request is not done. If request is done, then number of days is equal to Due Date (Done Date) minus Entry Date.

==

CLIENT TRANSACTIONS - CHANGE ORDERS <SR2570>

We have made some changes in the client Change Order to help better control these items. Two new checkboxes "Contract" and "Accepted" have been added as well as renaming the "Inc. Proposal" checkbox to "Print" which function has not changed.

If the "Contract" checkbox is checked, the change order will be included when the contract is printed, otherwise it will not. The "Accepted" checkbox indicates if the change order has been accepted by the client and should be included in pricing or if it is just a proposal (and excluded).

NOT SURE OF ABOVE OPERATION

Clients | Transactions (Change Order)

- Added two new checkboxes, "Contract" and "Accepted".
- Changed existing checkbox "Inc. Proposal" to "Print".

Reports | Print Client Detail Report

- Changed handling of "Printed Flag" for change orders.
- Changed transaction "ToDo" type for change orders to include indicators for "Print", "Contract" and "Accepted" using first letter of each type.

Reports | Print Client Proposal

- Changed handling of "Printed Flag" for change orders.

Reports | Warranty | Print Warranty Request

- Changed handling of "Printed Flag" for change orders.

Maintenance | Master Option List

- Changed wording on help prompts from "marked included" to "marked print".

Reports | Change Order Status Report

- Changed report for new "Type" checkbox information. (Contract & Accepted).

==

CLIENT TRANSACTIONS <SR2738>

Expanded the type "$" code on the Client Transaction browse list to include which check boxes are marked.

Clients | Transactions

- Added logic to expand type "$" to include codes for the check boxes within that transaction. They will be listed in the order of "C"ontract, "A"ccepted and finally "P"rinted.

==

CLIENT DETAIL REPORT <SR2589>

Made a number of small changes requested on this report. Also added a option in the "File | Supervisor| Configuration" for "Model Cost includes the Lot". If this is checked, then the model price will have the "Lot Base Price" (excluding premium) added and the lot base price will be zero.

File | Supervisor | Configuration

- Added new checkbox on "Misc" tab for "Model Includes Lot".

Reports | Client Detail Report

- Changed "Options" amount in first block to include transaction change orders ("$" type) that are marked as "Inc Proposal".
- In Finance Header section added new "Change Order" amount. This is the total of change orders that are marked as "Inc Proposal".
- In Finance Header section, added new "Paid" amount just to right of "Deposit Required". This is total amount of ALL deposits made by customer.
- If global "Model Includes Lot" is checked then the "Model Cost" will show the total of the Model Cost and the Lot Cost. Lost Cost will be hidden on the report.

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LOT STATUS REPORT <SR2591>

Added totals by subdivision to the report.

Reports | Lot Master Report

- Added "Status Totals by Subdivision" to report.

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WARRANTY REQUEST REPORT <SR2613>

Made several changes to report:

1. Added Vendor FAX Number to the form so user can fax them out.

2. Rearranged form to fit properly into a window envelope.

3. Added print option to print a "Client Copy". If selected, then the vendor copy will be printed along with second copy to be sent to Client. Note that the information is slightly different in address area, etc.

==

REPORT - CLIENT PROFILE EXPORT <SR2618>

Have expanded the available fields for export to include the client transaction detail in addition to the header information. Note that if transaction is exported then one line per transaction will be sent instead of just one per client. The client header information will be repeated on each detail line sent.

Maintenance | Client Profile Export Maint

- Updated with 2 missing Client fields
- Added support for Client Transaction fields.

Reports | Client Profile Report

- Update report/export for new client fields and client transactions.
- Note message on "Transaction" tab about filters on that tab.

==

SUMMARY CLOSING AND PIPELINE REPORT <SR2668>

Added a "Year-to-Date" totals under the "Month Total" that is a running total by month.

==

REPORT - WARRANTY REQUEST - CLIENT ADDRESS <SR2684>

Added new "Residence" line just below the "Job Location". This contains the client mailing address, city and state if the client is set to "Delivered". If status is not delivered, then residence will be blank.

Reports | Warranty | Print Warranty Request

- Added "Residence:" line for client actual address.

==

OPTIONS ANALYSIS REPORT <SR2706>

Added new report.

Reports | Sales Analysis | Options Analysis

- Added new report