PSCLIENT 14.00

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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External E-mail Support <SR2517>

Added support to program to interface externally to Outlook Express(tm) or Outlook(tm). This feature is available either at the Client Header or the Client Transaction Detail. Depending on the version of windows there may be inherent limitations.

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Mail Processing <SR2697>

Added a new set of automatic documents for "Final Closing" that is based on the Final Closing Date in the client header. The document names are "FinalC#", where "#" is replaced with a number corresponding to which letter to send.

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Maintenance - Model Photographs <SR2722>

Added a new "Image Maintenance" option button to the model maintenance window that allows photographs or other images to be associated with a given model (Maintenance; Models; Insert; Image Maintenance). Image files must be copied into the \PSCLIENT\PICTURES folder and must conform to the standard windows .BMP, .GIF, or .JPG image formats.

Also added a new "View Image" option button to allow users/clients to subsequently view model photographs/images.

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Scheduling Departments <SR2728>

Added ability to define departments "A" through "Z" in program configuration (File; Supervisor; Scheduler 2). Once defined, departments can subsequently be assigned to a schedule and used to filter To Do reports, export data to the PDA, and so on.

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Client Transactions - Private Flag <SR2759>

Program Change - If a Client Transaction is marked as "Private", only the user (originator) who entered it or the person to whom the ToDo was assigned is able to view or change the transaction. A new "Show Private" security option in the user maintenance will also allow specific users to view all transactions regardless of the private flag. In addition the Supervisor still has access to all transactions.

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File - Supervisor Login <SR2762>

Changed the login function so that when a supervisor attempts to log into a company that has active users, it will:

1. Display a list of all users who are currently active and who need to logout before the supervisor login can finish.
2. Block and prevent any additional users from logging in. As users log out, they will be prevented from returning as long as the supervisor login attempt continues to be active.
3. Automatically log the supervisor in as soon as the last user logs out.

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Added Warranty Codes <SR2815>

Added the ability to define and assign "Warranty Codes". Warranty codes will be used to classify warranty work into groups. The Warranty Summary report can be filtered on the newly defined codes.

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Scheduling Times <SR2821>

We have added a "Lag Time" to the scheduling task window. If given, this will cause the current task start date to be delayed by the given number of work days.

A new report "Scheduling Order Requirements" has been added. This report provides information on when items need to be ordered. This is based on a new field within the scheduling task.

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Clients - Finance Tab "Home Discount" <SR2832>

Added a new field in the Client Header Finance Tab for "Home Discount". This allows you to enter a dollar amount that the house will be discounted. Also the "Contract Group" export has been enhanced to include this new value. The calculated value for "ProposedTotal" and "$$ProposedTotalLot" values have been changed to take into account the "Home Discount".

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Model Maintenance - Add Subdivision field. <SR2839>

In "Model Maintenance", added a new field for "Subdivision". This can be used to restrict the selection list of models to a client. If a client has a selected subdivision, then only those models that are assigned to the subdivision. In Model Maintenance, selecting a subdivision will restrict the list to models assigned to the subdivision.

If a model is not assigned to a subdivision it will be available to all subdivisions.

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Salesperson Maintenance <SR2843>

Added a new field "Subdivision Restrict" which when given, clients records are limited to the subdivision assigned to a salesperson unless they were previously assigned to a different subdivision.

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Clients <SR2844>

Changed access method to speed up access when a Salesperson is specified and either the "Name" or the "AdKey" tab is selected.

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Raw Traffic Report <SR2855>

Changed the report to show information broken down by subdivisions.

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Raw Traffic Report <SR2890>

Added the ability to get the Raw Traffic Report for all visits, 1st time only or repeat visit only.

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Warranty Summary Report <SR2891>

Changed the report to print by subdivision and allow filtering by subdivision.

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Model Options <SR2892>

Added a new description in the Model Option maintenance area. This description is appended to the end of the Master Option description where ever displayed or printed.

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Trade Contractor Projection Report <SR2893>

Added a "Calendar View" to the Trade Contractor Projection Report.

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Subdivision Maintenance <SR2895>

Added new "Long Name" description for the Subdivisions which is 80 characters long. This will be used instead of the short reference name on most reports.

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Subdivision <SR2896>

Added City, State and Zip Code fields to subdivision. This along with the client job address can be used in export & mail merge to create a full address.

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Client Status Addition <SR2897>

We have added two new options in Client Status, "Model" and "Spec.". These are used to better define the construction process.

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Calendar Report <SR2898>

Added the ability to limit the Calendar Report to just one User Initials.

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Scheduling ToDo List <SR2901>

Complete re-write of this section for enhanced operation and speed.

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Warranty Request Report <SR2902>

Added Microsoft Word (ability to take a standard word processing file and merge the warranty specifics) support to the program as related to printing Warranty requests. This allows you to use word processing features (bold, underline, etc) within a defined warranty document. All fields that are available on the internal (warranty report) are available within mail merge.

The "Mail merge Data File (WarrantyMergeData.CSV)" is located in the PsClient\Export directory.

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Document Maint <SR2903>

Added new token "#" for export which contains the values for a Client Detail record. Note that this will only have values when called from Client Transaction processing ("Letter").

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Client Transaction Detail

Increased the text size for the Client Transaction detail from 1000 characters to 4000 characters.

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Color Selection <SR2924>

A new "Color Selection" process has been added to the program. The color attributes are attached to specific model options. This feature supports reports by room and by trade.

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Client Header - New Type "CX" <SR2926>

Added a new Client Status of "CX (Cont Cx)". This can be used for clients that cancelled contracts.

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Client Header - 6 New Entry Fields and 6 New Date Fields on Contract Tab. <SR2946>

We have added 6 new user defined description fields and 6 user defined date fields in the client header on a new "Contract" tab. These values are exported to MS Word as a part of the "Y: Contract Group" of values.

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Client Transaction Detail <SR2947>

Added a new field just after the Due Date called "Grouping". This can be a number from 0 to 255 and will further sort the transaction detail within the same Due Date.

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Client Proposal Report - Added Disclaimer Text <SR2948>

Added a user defined "Disclaimer Text" to the end of the report. This text is defined in "File; Supervisor; Proposal Disclaimer Text" option.

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Scheduling Job List Reports <SR2955>

Added new filter for "Past Due only" that if given, will limit report to only jobs that have an open task (non "Done") with an ending date prior to the user entered date.

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Client Detail Type "$" (Change Order)

We have extended the "$" Change Order type into two types, "$C" and "$O". The changes through out the program are as follows:

1. $C = "Change Order" . This behaves as if the old Contract Flag was not checked.
2. $O = "Custom Option". This behaves as if the old Contract Flag was checked.
3. On the Client Transaction window, the "Type" column has been changed slightly to accommodate the newer Change Order and Custom Option. for these types only, it will show the two character code followed by a colon and then optionally "A" for accepted and "P" for printed. The old "C" code for contract no longer applies.
4. On the Client Transaction Edit window, the "Contract" checkbox on a Change Order type record no longer exist. The type now determines the effect that was controlled before by this checkbox. (See above)
5. In most places in the program, the "Change Order" can be interchangeable with either of the two new codes.
6. In the Flat File (Client Profile) and CSV export, the old "TxContract" field still exist however it is

redundant to the ToDo Type code. This will be set to "True" if ToDo Type is "$C", otherwise will set false.

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Pipeline Report <SR2966>

Added "Ending Period" to report.

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Mail Merge <SR2967>

Added to MS Word and Client Profile export the availability of additional Realtor information.

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Warranty Summary Report - New Filter <SR2978>

We have added a filter on the "ToDo By" field allowing the printing of the warranty summary for one person.

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Conversion Report Calculations <SR2979>

Changed this report to calculate results as follows:

Number of Visits = This is the total of ALL visits made during the period regardless of if the client bought or not. The Visit Due Date is used for the date range test.

Number of Contracts: This is the number of clients who has a "Contract Signed" date with the given range and does not have a Contract Cancelled date.

Avg # Days: There is not changed in this value. It is the average of the number of days between Client Add Date and Contract Signed Date.

Approx $ Generated: This is the total by client of the Model Cost, Options selected and any Change Orders that are approved and are NOT marked as contract.

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Warranty Code <SR2981>

Added a new Warranty Code for use in Client Warranty records.

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Warranty Activity Report <SR2982>

Added a new report for Warranty Activity. The following notes apply to this report.

1. For weekly report, end of week is whatever day is given by the user.
2. For monthly report, the user date is always forced to the end of the month.
3. All detail records of a client that is marked deleted will be skipped.

4. The "Started Date" (first line count) is based on the Entry Date.
5. The "Completed Date" (optional second line) is based on the Due Date.
6. "Open" is any warranty that is not marked as done regardless of date.

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Scheduling <SR2983>

We have added a "Sub Sort" to the scheduling which will allow you to control the order or grouping of task that have the same date. This is primarily for keeping multiple related task together in the list.

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Vendor Report <SR3004>

Added new "Include Deleted Vendor" checkbox to report prompt. If this is not checked, then any vendor that has its "deleted" checkbox marked will be excluded from the report. Also if deleted vendors are included in the report, they will show a message "Deleted" under their vendor number.

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User Security <SR 3015>

Added a new security called "9: Allow Edit of All Warranty ToDo's" which when checked will allow that user to edit any Warranty ToDo transaction regardless of who wrote it or who the ToDo is for. This only applies to ToDo's with a "W" code.

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