PSCLIENT VER. 15 UPGRADE CHANGES

Best printed with margins set to left 1.25 and right 1.25.

General | Deleted Item Handling - SR3021

Added a "Show Deleted" check box to most maintenance module browser windows which will allow items marked deleted to be hidden. Also changed Lender, Realtor and Option Group master list reports to not print deleted items.

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Scheduling; Daily ToDo Report - SR3026

Added a column to the Scheduling Daily ToDo Report that shows the number of days scheduled for each task.

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Client Maintenance Doc button - SR3070

Added the ability to create, access and organize customer documents in a dedicated customer file folder.

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Maintenance | Copy Client ToDo's - SR3118

Added a new option to copy an existing client's ToDo's to another client. It neither erases nor overwrites any existing original client information. It does not copy anything other than ToDo information and will neither erase nor overwrite existing ToDo's even if they are duplicates.

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Maintenance | Master Option List - SR3125

Added a "Model" button that will show all models and the "Include" status of this option within that model. You may change any or all models include status from this window.

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Subdivision / Lot Maintenance - SR3126

Added a new field for "Job Number". This can them be used at the Client browse window to look up a client by that number. Each Job Number must be unique.

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Client Proposal - SR3134

Added "LotGarage" export item that contains the Garage string from the CLOTS.

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File | Supervisor | Mark Inactive Clients - SR3141

We have added a new option to allow your to mark clients as "X" based on inactivity.

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Lot Status Codes - SR3142

Added an additional 9 "Lot Status" descriptions to bring total descriptions up to 18.

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Copy Color Selections - SR3144

Added an option ("Maintenance | Color Choice | Copy Color Selections") that allows you to copy color selections from one model to other models.

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Client "No Mail" checkbox expanded - SR3145

Expanded the "No Mail" checkbox in the Client header. There are now three separate No Mail options, one for each type of mail (Pre-Sale, Post-Sale and Final Close). When existing data is converted, if the original "No Mail" flag was checked, then all three of the new No Mail options will also be checked.

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Source Documents - SR3146

Changed the way source documents used by MS Word are handled within the program. The first time you log into a company after upgrading to version 15, a series folders will be created within the "PSClient\Docs" folder. The folders will be named "COMPANY###" (where "###" is the company number). Within each COMPANY### folder, additional folders will be created for each subdivision that has been defined within that company.

When PSClient subsequently uses a document ("LETTER1" for example), it will first look in the subdivision folder the current client has assigned in the Client Header. If the document does not exist there, it will then look in the "PSClient\Docs\Company###" folder, and then finally the "PSClient\Docs" folder. This allows various documents to be customized by company and subdivision as desired. If you don't need this customization capability, then just leave your documents in the "Docs" folder and the program will continue to work as before.

In order to support these multiple documents, two program options, "Warranty Request" (when using MS Word to print) and "Mail Processing" will now automatically print the documents.

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Print Master Option List - SR3159

Added new option, "Print Headers Only", to the report setup window to allow printing a quick reference list consisting of Option Headers only.

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Master Model Report - SR3164

Added a new Subdivision filter to the report setup window. If a subdivision is specified, only models that have been assigned to that subdivision will be printed.

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Client Change/Custom Orders - SR3175

Added a new checkbox option, "Rejected", on the Change Order and Custom Order window in client transactions. This allows you to specify that a customer has rejected/refused/delayed a decision on a change/custom order.

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PDA | Superintendent Sync - SR3177

Added ability to change construction stage via the PDA.

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Scheduler ToDo Report and Calendar - SR3179

Added the Client Lot # to both reports.

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Export Model Options Comparison - SR 3181

Added a new option that will export Cost, Price, and some other model related information to a spreadsheet for a side by side comparison. Note that the exported cost used is the cost sent to Eclare via the Exchange process and not the master option list cost.

Also extended the option "Cost" to the model level. If defined in a model, that cost will be shown or used. If not defined at the model level, then the master option cost will be used.

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Warranty Summary Report - SR3203

Added an option to sort by "Subdivision, Due Date, Vendor #" with the oldest date showing first.

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Warranty Request Report - SR3205

Added "Lot Number" to the Job Address Line as well as "Job Number" to the upper right area next to Warranty Expires. MS Word export has been updated with two new fields ("CLotNum" and "CJobNum") which contain these two items.

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PDA | Warranty Tech Sync - SR3206

Added menu item to allow Warranty Techs to sync warranty TODOs with a PALM OS PDA.

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Warranty Technician - SR3207

Added a "Warranty Technician" to the Warranty ToDo that allows a user who will be the warranty technician to be selected. The Warranty Summary and Activity report may then be filtered on that technician.

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Reports - SR3212

Changes on most reports the page number to a "Page of Pages" display.

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Range Entry Fields - SR3214

Have changed programs to automatically fill in the second entry of a related pair of fields with the first value. An example of this would be on reports that allow specifying a lower and upper account number. Whenever the lower entry is changed, the upper will also be changed to that value. Once the lower is entered, you may then changed the upper or clear it if not desired.

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Client Load ToDo Codes - SR3215

Added a new "Default ToDo Load" in the File | Terminal Configuration window. If a ToDo code is selected as the default, it will be used whenever the "Load ToDo" option is selected in Client Transactions.

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Client Pre-qualification - SR3228

Added to the client header the ability to call an Excel spreadsheet to pre-qualify a client. A description list for up to ten forms can be defined in File | Supervisor | Configuration. The spreadsheets can be global to all companies, specific to a given company, or specific to a subdivision within a company depending on which folder the spreadsheet file is saved in. This function loads the predefined spreadsheet and does not merge any data fields from the client record.

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Master Option Maintenance - SR3251

Added four miscellaneous display colors which can be assigned to individual option lines to allow groupings by color. Import Model Options and Update Master Option Numbers utilities now include the display colors.

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Realtor Maintenance - SR3253

Added the ability to duplicate an existing realtor record by highlighting the record to be duplicated in the list of realtors and by then clicking on the "Duplicate" button. This will insert a new realtor record containing all the information from the highlighted record with the exception of the realtor name. You can then make corrections to the new record as desired.

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Lots Inventory - SR3275

Added a new "Purchased Date" to the lots maintenance window. The new field is used in the Client Profile Report, Master Lot Report, and Lot Maintenance/Selection browse list.

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Date Analysis Report - SR3278

Added a new "Date Analysis Report" that allows selection of specific dates to be included on the report based on the client file. The report structure can be saved for later use. Filters are available at the time of printing reports.

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Reports | Management Report | Summary Closing & Pipeline Report - SR3281

The "Ending Period" prompt has been changed to "Ending Date". This allows you to restrict the included activity to a date before the end of the last month, thus making it easier to match up this report with others even while new entries are being made.

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PDA | Superintendent Sync - SR3293

Optional upload of Change Order information to PDA.

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Import Clients - SR3296

Added information from client contract tab, six user defined contract dates and six user defined contract descriptions to client import.

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User Report - SR3307

Added a button on the User Maintenance window that will preview a report of all users for that company along with their security assignments. Once previewed, the report can then be printed.

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Encrypted Backup and Restore - SR3321

Added the ability to create and restore an "encrypted" backup file in all applications.

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Customer Suggestions - SR3322

Added a new option to each application's FILE menu to allow users to submit and maintain suggestions for improvements to Prosoft software.

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Reports | Warranty | Warranty Summary - SR3327

Added the ability to mark multiple Warranty Codes to be included in the report.

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Scheduling - SR3332

Corrected global tag function to update both Start and Done dates if the task is being globally marked as done.

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Master Option List - SR3335

Added a new Master Option Type called "Standard - Fix Retail". This is similar to the original "Standard" except that the retail price can not be changed in the client model area.

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PDF Support - SR3359

We now have an option (requires purchase of option) that allows you to export any report that can be previewed as an Adobe PDF format. Along with this, you can also E-Mail this file .