

PSCLIENT VER. 16 UPGRADE CHANGES

Important Notice

We are please to present several new features in PS Client 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.

1. Prior to Conversion a decision needs to be made related to the Lot # structure. This release will convert the layout of the lot into up to 3 segments (user definable) with a total available length of 12 Characters.

Note: reports are still labeled as LOT # within the program. We consider internally the entire numbering structure to be a representation of the lot. Since users may create their own concept and usage we are not attempting to extrapolate that information. (See first item below - Software Report: 3297)

2. Prior to Conversion if you are currently using the Lender information in the Client Header, Finance Tab, then you will need to do some preparation BEFORE converting. (See third item below - Software Report: 3404)
3. 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, anytime you are updating a mass of information, backups are very strongly suggested before you start.

Lot Number Changed to Fixed Length

Program(s): PSClient Software Report: 3297

File | Supervisor | Configuration

File | Supervisor | Convert Lot Number

Client | Edit

Client | Lookup by Lot

Client | Lookup by Job Number

Maintenance | Subdivision/Lots Maintenance

Scheduling | Construction Overview

Scheduling | Daily ToDo's Report

Scheduling | Graphs | Construction Graph Report

Scheduling | Job List Report

Scheduling | ToDo Calendar Report

Reports | Change Order Status Report

Reports | Client Detail Report

The lot number has been changed to a fixed length and supports up to three segments. These segments would be typically classified as Area, Block and Lot. The purpose of the segment structure is to help organize and structure the layout of lot inventory for reporting and access.

Importing of Lots

Program(s): PSCClient Software Report: 3457
File | Supervisor | Import | Import Lot Information

Added an option called "Import Lot Information". This as the name implies allows the import of lots from a CSV.

Reconfiguration of Lender Lookup

Program(s): PSCClient Software Report: 3404
Client Maint | Edit
File | Supervisor | Remove Marked Records
Reports | Client Detail
Reports | Client Profile Report
Reports | Management | Management Overview
Reports | Setup | Master Lender Report
Maintenance | Lender Maint
File | Supervisor | Company Mant | Insert Company

To consolidate master file maintenance we have reconfigured the "Lender Lookup" to access the vendor file. If you are currently using the Lender information in the Client Header, Finance Tab, then you will need to do some preparation BEFORE converting. The rules below will be used when converting from version 15 to version 16.

- A. If a vendor exists that is also a lender you will need to modify the Lenders number on the "Lender Maintenance" screen to be the same as the current "Vendor Number" with the addition of and asterisk in front and after the vendor number (i.e.: VEN001 becomes *VEN001*. This will signify that you intend to map the existing LENDOR to VENDOR.
- B. If the Vendor Master File does not contain the "Lender" the system will automatically create a vendor with the information from the Lender file.

Added the Ability to Have Multiple Contacts for Each Vendor

Program(s): PSCClient, Eclare, Gemini Software Report: 3273
File | Supervisor | Company Maint
Maint | Vendor Maint.
Maint | Vendor Maint.
Reports | Vendor Related | Vendor Listing
Scheduling | Trade Contractor Projection
Reports | Warranty | Warranty Request Reports | Warranty | Warranty Summary

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

New Photo Album

Program(s): PSCClient Software Report: 3314
Client | Change | Client Documents | Photo Album

A feature was added allowing the management of pictures taken during different stages of construction. These pictures can then be organized, a description entered, saved and presented to the client in a predefined formatted layout. Additionally the output can be faxed or emailed (if option has been purchased) directly from the system.

Warranty Classes – Punch-out, Orientation and Warranty

Program(s): PSCClient Software Report: 3320
Client | Transactions;
Maintenance | Client Profile Export Maint
Reports | Client Detail Report
Reports | Client Profile
Reports | Warranty | Warranty Request
Reports | Warranty | Warranty Summary
Reports | Warranty | Warranty Activity

Warranty transactions have been expanded to include a class definition. The available classes are "Punch-out", "Orientation" and "Warranty". Classes can be used as filters in the various warranty reports. In addition, the Warranty Request report title will change based on the type (class) of report.

Change Description Ability on Addt'l Key

Program(s): PSCClient Software Report: 3330
File | Supervisor | Configuration
Client | General Tab
Maintenance | Check Duplicates
Client | Addt'l Key Tab

You can change the description of the field currently named "Addt'l Key". The new description will then appear on the client maintenance screen and reports. The definition is a supervisor function (Supervisor; Configuration).

ToDo's Now Have a Completed Date

Program(s): PSCClient Software Report: 3354
Clients | Transactions | Change

We have added a "Completed Date" to the Client Transaction window. Once the transaction is marked as done, this new field will be enabled and filled in with the current login date. You can then adjust the date if necessary.

New Auto Reports

Program(s): PSCClient, Gemini Software Report: 3376
File | Auto Reports

"Auto Reports" was added to the program allowing the definition of a set of reports to be run as a group. This provides the user to set up and save multiple report structures. Examples would be daily, weekly and monthly activity reports.

Creating Import Headers

Program(s): PSCClient Software Report: 3387
File | Supervisor | Import | Import Model Options
File | Supervisor | Import | Import Model Pricing
File | Supervisor | Import | Import Vendors

The option to "Create Headers" in the "Import Model Options", "Import Model Pricing" and "Import Vendors" was added. This helps identify the layout required when importing information into the system.

Multiple Scheduling Changes

Program(s): PSCClient Software Report: 3395
File | Supervisor | Configuration | Scheduler Tab
File | Exchange | Update Master Vendors / Pay Code / Reason Codes
Client | Change | Schedule | Edit Task

We have made a number of changes to the scheduling option within the program. Please see the manual for full details. (The manual is in electronic format on the CD that was part of the installation.) Changes include; updating a scheduling task will create ToDo transactions; tasks can be dependent on up to 5 non sequential prior tasks; Reason Codes are assignable by task. Reports have also been enhanced to show the additional information.

Enhancement to Doc Folder

Program(s): PSCClient Software Report: 3406
Client | Change | Client Documents

The client document folders (Docs) have been enhanced to contain five predefined folders allowing a better structure for management of documents with a client.

Reporting with More Features

Program(s): PSCClient Software Report: 3418
PSCCLIENT | Maint | Vendor List
PSCCLIENT | Reports | Vendor List
PSCCLIENT | Reports | Warranty | Warranty Summary
PSCCLIENT | Reports | Warranty | Warranty Summary Report

We have added a new sort option that will allow you to print this report by Vendor/Technician and then by Due Date. Also have added the ability to Auto Fax or Auto Email reports to the vendors.

New Fields Added for Lot Maintenance

Program(s): PSCClient Software Report: 3435
Maintenance | Subdivision/Lot Maint | Lot Inventory | Edit
Reports | Lots Master Report
File | Supervisor | Change Lot Number Format | Update

We have added "MLS #", "Area", "Lot Size", "Market" and "Finder" as new fields in the Lot record and added these fields to the export structure.

Grouping of Client Options by Deadline

Program(s): PSCClient Software Report: 3451
File | Define Toolbar
Maint | Option Deadline Groups
Reports | Setup Reports | Order Group
Maint | Master Option Maint
Schedule | Master Schedule List | Schedule | Change
Schedule | Setup Reports | Print Master Schedule
Client | Change | Schedule

We have added a new way to group together client options by deadline. The purpose of this feature is to prevent changes (color or selections) to options if they have reached a stage in construction that would prevent the change. You can set up "Deadline Option" groups and then assign each Master Option to one of these groups depending on when a decision has to be made by the client. The process of updating scheduling on a job prevents selections from being changed offering a more precise control of client selection of options and colors. These Deadline groups can be "Exchanged" in stages to Eclare.

Client Contract Tracking

Program(s): PSCClient Software Report: 3452
Client | Header Edit | Save Contract

Each time the "Save Contract" button is selected a "snapshot" of the current changes (since the last save) are recorded within the system. The addition of this feature allows for multiple selections from the "Standard Option List". Additionally, the saved

documents are handled as addenda to the original contract. "Custom Changes (change orders) can be attached to specific addenda.

Option Reference Report

Program(s): PSCClient Software Report: 3468
Reports | Sales Analysis | Option Reference Report

A new report was added that allows you to get an overview of which clients purchased any given option. The report limits the clients to status of "Sold", "Spec" or "Model". You can also limit the clients further by either Contract Date or Add Date.

Scheduling Reports - New Features

Program(s): PSCClient Software Report: 3474
Scheduling | Construction Overview

We have changed (corrected) this report to exclusively use the "Active" schedule checkbox within the client schedule header.

Scheduling | Lob List Report

There is a new pull down option "Sold, Model or Spec" to status list. When selected, all three will be included on the report.

Change Order and Custom Options Text Maintenance

Program(s): PSCClient Software Report: 3485
Client | Transactions | Edit- \$C and \$O types

The ability to copy the text from a Master Option into a Client Change Order or Custom Option was added. This only copies the Description and does not link the transaction in any other way to the Master Option. This eliminates having to re-type a description.

Auto Save Letters in Clients Individual Folder

Program(s): PSCClient Software Report: 3486
File | Supervisor; Configuration
Client | Edit Header | Contract Tab
Client | Transactions | Edit

The programs supervisor configuration option now has a check box to turn on the option to automatically save any MS Word document created in Contract (Client Header; Contract Tab), Letter (Client Transactions] and Change Order (Also Client Transactions). The documents are saved in the specific clients "Docs' folder.

Exchange of Client Information

Program(s): PSCClient, Eclare Software Report: 3487
File | Supervisor | Company Maint
Clients | Edit Header | Exchange

PSCClient now allows you to exchange a client's information to Eclare in multiple stages by using the new "Option Deadlines" (see report 3451). Each time you Exchange in PS Client, you will be presented with a list of Option Deadlines and their current status.

Option to Hide Zero Quantities in the Model

Program(s): PSCClient Software Report: 3491
Client | Header | Model Tab

We have added a checkbox "Hide Zero Qty" to upper right part of window. When checked this will hide all options, excluding headers, having a quantity of zero. Also, added a "Search" button that will look up options by description (or partial description). For example if an option contains the word "fixture" and that was entered as a search key, the system would return any with the word "fixture" in the description field.

Limitation to Change Sales Associate in Customer Header

Program(s): PSCClient Software Report: 3499
Client | Edit | Sales Associate

New change that will restrict the Sales Associate field from being changed after a client has been added. Only the Supervisor, or a user defined with Administrator security, and the user that originally added the client is able to change this field.

Multiple "Details" class in Export Contract to Word and Internal Contract Printing

Program(s): PSCClient Software Report: 3501
File | Supervisor | Contract Text Maint.
Maintenance | Master Option List
Reports | Setup Report | Master Option List
File | Supervisor | Import | Import Model Options
Client | Header | Contract Tab | Print Contract
Reports | Client Proposal
Client | Header | Contract Tab | Print Contract

When exporting a contract to word the system allows for the detail to be broken into a maximum of 9 groups. This allows for the contract to have sub totals by each of the detail groups. Prior to this update all options were in one group.

Photos at Subdivision Level

Program(s): PSCClient Software Report: 3508
Maintenance | Subdivision/Lot Maint
Maint | Subdivision/Lot Maint | Edit

Added the capability of associating pictures to subdivisions; this works similar to the way pictures are assigned to models.

Calendar - Show Lot Number

Program(s): PSCClient Software Report: 3510
Schedule | Trade Contractor Projection

A new checkbox was added that allows you to show on the calendar report a client lot number (which will be the full extension of the newly defined structure) instead of their client ID.

Date Information in Backup File Name

Program(s): PSCClient, Eclare, Gemini Software Report: 3523
File | Supervisor | Configuration | General Tab
File | Backup Company Data
File | Supervisor | Restore Company Data

The ability to set the maximum number of backup files saved to any given location was added. Each file will be automatically named to include a backup date. During the restore process you can select from the specific backup files. The file name in the past on a backup was labeled PSCxxx.zip, where xxx was the specific company number. This naming convention caused backups to overwrite older backups. The new feature allows for users to structure the system to maintain multiple copies. Backup file name will now be APPxxx-yyyy-mm-dd-hh.zip where APP = application ECL, GEM, PSC, xxx = company number, yyyy = year, mm = month, dd = day, hh = hour. For this feature to work you will need to define the maximum number of backups, otherwise the existing concept of overwriting will continue.

Model Options – Window Expansion

Program(s): PSCClient Software Report: 3524
Client | Edit Header | Model Tab

The "Model Option Selections" window on the client maintenance screen has been changed to a full size (expandable) window. This allows a salesperson to see more options when making selections.

Client Proposal – Lot # & Subdivision Information

Program(s): PSCClient Software Report: 3528
Reports | Client Proposal

The Client Proposal report now will show the subdivision and lot numbers.

Construction Overview - Sort Options

Program(s): PSCClient Software Report: 3529
Scheduling | Construction Overview

The Construction Overview Report now can be sorted by either Construction Start Date or Promised Date, in addition to Subdivision.

Scheduling Lost Days & Reason

Program(s): PSCClient Software Report: 3533
Scheduling | Lost Days/ Reason Report

We have added a new report that will show days lost on a job based on the current schedule. This report is available by vendor.

Management Overview – New Sort Options

Program(s): PSCClient Software Report: 3548
Reports | Management | Management Overview

We have added an option to sort report by "Subdivision, Client", "Subdivision, "Estimated Done" or "Subdivision, Promised Date".

Closing Summary – Hide Contract Price

Program(s): PSCClient Software Report: 3549
Reports | Management | Closing Summary [Financial]

An option was added to "Hide Contract Price". If checked, the contract price information will not show on the report.

Lot Master Report – Hide Lot Premium

Program(s): PSCClient Software Report: 3552
Reports | Lot Master Report

The Lot Master Report now allows the option to "Hide Lot Premium" on report.

Closing Summary Financial – Additional Sort Options

Program(s): PSCClient Software Report: 3553
Reports | Management | Closing Summary Financial

We enhanced the sort option on the Closing Summary Financial by "Client" (current method) or "Date". When sorting by date, the program further allows selections.

Trade Contractor Projection – View By Lot Number or Client ID

Program(s): PSCClient Software Report: 3554
Scheduling | Trade Contractor Projection Report

The option to "Show Lot #" instead of "Client ID" was added. This only applies to detail and not the calendar view (which already has the option). This uses the lot assigned on the Finance Tab. If no lot is assigned, then "No Lot" will appear on the report (assuming Show Lot # ... has been chosen).

Client Proposal – Hide Pricing

Program(s): PSCClient Software Report: 3555
Reports | Print Client Proposal

You may now select the option to "Hide Pricing" on the report.

Contract Mail Merge - New Merge Fields

Program(s): PSCClient Software Report: 3559
MSWord Merge - Contract Group

Three new mail merge fields have been added to the "Contract Group" when merging to MSWord.

1. ContractAmt - Contract Amount (entered on lower left Finance Tab in client header)
2. DepositCO - Total of all Change Order deposits (Client Header, Finance Tab, Deposits)
3. DepositNonCO - Total of all NON Change Order deposits (Client Header, Finance Tab, Deposits)

Model Options

Program(s): PSCClient Software Report: 3560
Maintenance | Models | Change
Maintenance | Models | Change | Edit
Client | Header | Model Tab

We have added a new checkbox "Option No Longer Avail" in the model level option list. This allows you to hide an option in a given model. This will not hide the option if a client selection includes the option.

ToDo Alerts

Program(s): PSCClient Software Report: 3590
PSCClient ToDo Alert

We have changed to "To Do" alert from a pop-up window to an indication on the main menu bar. If you have a "To Do", the "To Do List" menu option will show with a red background instead of the normal color. Also, the first time an alert occurs, the program will play the standard windows "Exclamation" sound that can be defined in the Windows | Control Panel | Sound and Audio Devices | Sound.

Master Option List – Viewing Options

Program(s): PSCClient Software Report: 3629
Maintenance | Master Option List

We have added two new options to this list. The first is "Show Headers Only" which when checked will display only the header lines. The second is a "Filter" field. If a description is entered the display will be limited to options that contain that description anywhere within the option description.

Job Schedule – Lot Numbers on Browse List

Program(s): PSCClient Software Report: 3634
Schedule | Job Schedule

The Lot Numbers was added to the browse list.

Administrator Security Level

Program(s): PSCClient Software Report: 3654
File | Supervisor | User Maint; Edit
Client | Header | Edit
File | Supervisor | User Maint | Print Users

We have added a new security level in User Maintenance called "Administrator". With this authority, a user has the ability to change the sales person at the client level. In the past only the "Supervisor" or the person that originally added the client had the authority.