

Area Adjustment for Model Base Price

Program(s): PSClient Software Report: 3500

File | Supervisor | Configuration

Maintenance | Subdivisions and Lots | Edit

Maintenance | Models

This function allows the user to have a dollar figure associated to a subdivision allowing global change in one place that effects all models that are associated to the subdivision. A subdivision must be selected before a model can be selected for a client. Models can now be specific to only certain subdivisions and are defined by subdivision.

New Date Fields in Client Header

Program(s): PSClient Software Report: 3550

Client | Change | Departments

Client | Transaction | Client Header | Departments

In expanding the existing user definable dates from 18 to 72 screen changes were needed. A [Department] button was added that opens a second window containing Construction, Design and Finance tabs. Each classification has specific user definable dates and text boxes. The new information can be exported.

Import Model Option Pricing

Program(s): PSClient Software Report: 3576

File | Super | Import | Import Model Retail Pricing

File | Super | Export | Export Model Pricing

We have added an import and export options for the "Base Model" option pricing.

Contract Token Added

Program(s): PSClient Software Report: 3604

Client | Header | Contract Tab | Print Contract

Maintenance | Administrator | Contract Text Form

A new token "ProposedGrandTotal" has been added to the contract "Y" group. This will give you the same as "Total Amount" on the Client Detail report. This token is also located in the Contract Text edit window.

Added Check Box "Show Only My Entries"

Program(s): PSClient Software Report: 3632

Client | Transactions

A new checkbox "Show Only My Entries" on the Client Transaction window was added, when checked, only transactions that are assigned to you as "To Do", "Warranty Tech" or initially created by you will show.

Deadline Group Filters

Program(s): PSClient Software Report: 3635

Reports | Setup | Master Options Report

Added optional "Deadline Group" filters to the report

New Contract Merge Fields

Program(s): PSClient Software Report: 3637

Maintenance | Administrator | Contract Text Maintenance | Edit

Mail Merge | Contract

Client | Header | Print Contract

Merge field "W" was changed to include Client Job Address (from Construction Tab), Lender Construction, and

Permanent Lender from the Client Header.

Schedule Groups

Program(s): PSClient Software Report: 3641

Scheduling | Model Option link

Client | Header | Schedule | Edit

Maintenance | Master Option | Edit

Maintenance | Schedule Groups

Reports | Setup | Master Option List

Scheduling | Setup Reports | Master Schedule Group

Scheduling | Master Schedule | Schedule

Scheduling | Setup Reports | Master Schedules

Schedule Group replaces the current (V16) linking of scheduling and option list. Instead of a scheduling task pointing to only one option task "Schedule Groups" are used. Within the Master Option list, you can associate each option with one of the groups. Then within scheduling (master and client), the same association can be made.

When a client schedule is updated and a task is encountered that has a schedule group associated with it, the program will check to see if any associated task is active and if so, will also set that schedule task active.

Added Phone and Fax to Warranty Request

Program(s): PSClient Software Report: 3644

Reports | Warranty | Warranty Request

Your company phone and fax number now are shown on all Warranty Request. These two numbers are defined in the File | Supervisor | Configuration option.

Check Box for Certified Realtors

Program(s): PSClient Software Report: 3657

Maintenance | Realtor List

A new field called "Certified" (yes/no) was added to the Realtor file to define if a realtor is a certified realtor.

Computer Name Added to User List

Program(s): PSClient, Eclare, Gemini Software Report: 3666

All Programs

A new column, "Computer Name", has been added to the user list option under the File menu. It displays the specific workstation/computer name a given user is logged in on.

Extended Months Shown for Budgets

Program(s): PSClient Software Report: 3676

Maintenance | Sub Division & Lots | Edit

Budgets have been expanded to show 36 months instead of only 12 months. The pipeline report will use this new budget information in it's reports. We have also expanded the pipeline report to allow for weekly (without budgets) and quarterly periods.

Scheduling Predecessor Processing

Program(s): PSClient Software Report: 3684

Scheduling | Maintenance | Master Schedules | Schedule | Insert/Change | Additional

Changed the predecessor processing so that a valid predecessor date will always over-ride the normal date calculated using the WAC type.

Predecessors Reference Prior Task

Program(s): PSClient Software Report: 3686
Schedule | Master Schedule List | Schedule | Edit | Predecessor

The predecessors may now reference prior task groups. Thus Task C100 can now reference any task in groups "A" and "B" as well as task up to 100 in group "C".

Copy Client Information Expanded

Program(s): PSClient Software Report: 3704
Maintenance | Administrator | Transfer Client Information

This allows you to transfer or copy information from one client to another. You may chose to copy some of the client header information, the client transaction detail, Client Documents folder or any combination of these. This replaces the older option called "Copy Client To Do's".

Internal Notes Added to Master Options

Program(s): PSClient Software Report: 3708
Maintenance | Master Option List | Edit

We have added an "Internal Note" (250 char) to the master option list which will be displayed in the Client Model edit window. The sales person can also change the note at that point if needed. This note will NOT appear on any client paperwork.

Color Choices Added to Proposals and Contracts

Program(s): PSClient Software Report: 3709
Client | Header | Contract Tab | Print Contract
Reports | Client Proposal

We have added the option to include Color Choices on both the Client Proposal and the Client Contract, both the Non-MS Word format. We are unable to add this feature to the MS Word interface due to linking limitations.

Sales Activity Report Summary

Program(s): PSClient Software Report: 3713
Report | Sales | Activity Report

Activity summary by subdivision was added to the Sales Activity Report.

Classes Further Define Option List

Program(s): PSClient Software Report: 3720
Maintenance | Master Option List | Insert/Change

"Option Class" pull down has been added to the Master Option List, used to classify each option into groups. This new "Class" is then used in the Master Model Report as a filter. Additional filters ("Color Group", "Option Deadline" and "Option Type") have been added to the report.

Quick Updating of Schedules

Program(s): PSClient Software Report: 3737
Scheduling | Scheduling Quick Updates

Scheduling Quick Updates - This feature allows schedule updates of multiple jobs on a single screen by superintendent.

Construction Stages Linked to Schedules

Program(s): PSClient Software Report: 3738

Scheduling | Maintenance | Master Schedules

A new link added to the Master Schedule and the Client Schedule to reference the "Construction Stage" list. When a task becomes non-Pending, the program will automatically update the client header "Construction Stage" to the proper value.

Contract Tokens for Spouse Changed

Program(s): PSClient Software Report: 3758

File | Supervisor | Contract Text Maintenance

As a result of screen changes we have added the new token "CoBuyerFirstName" and "CoBuyerLastName" to both the internal contract form and the MS Word merge. These are equivalents to "SpouseFirstName" and "SpouseLastName". Either can be used with the same result.

Individual Controls on Sharing Vendor Data With Other Programs

Program(s): PSClient, Eclare, Gemini Software Report: 3760

Gemini: AP | Vendor List Maintenance

File | Exchange | Send Vendor / Paycode List

Eclare: File | Exchange | Update Common Information

PS Client: File | Exchange | Update Master Vendors / Paycodes / Reason Codes

Two new checkboxes, "Send PSClient" and "Send Eclare" have replaced the "Local Only" checkbox on the Gemini Vendor List Maintenance General tab. When the appropriate box(es) are checked, vendor data can be sent to the PSClient and/or Eclare program(s) via the optional Exchange module.

Exchange Enhancement

Program(s): PSClient, Eclare, Gemini Software Report: 3763

PS Client: Client | Header | Exchange

Eclare: File | Exchange | Retrieve Jobs

Gemini: File | Exchange | Retrieve Jobs

Lender information entered in PSClient is now part of the Exchange function. Also, Eclare now contains the "Lender" field.

Order Lead Days

Program(s): PSClient Software Report: 3765

Scheduling | Quick Schedule Update

If you enter a "Order Lead Date" into a task, you will now see a task appear within the schedule at the point you should place the order. The displayed task is not a real task but will allow updating of order status.

Superintendent Restrictions for Users

Program(s): PSClient Software Report: 3766

File | Supervisor | User Maintenance | Edit

Superintendent Restriction. - If active (filled in) then the user will only be able to change jobs (they may still be viewed) that have the Superintendent assigned in the client header (Construction tab). This restriction applies to the "Schedule Quick Update", "Client Schedule" and "Job Schedule Maintenance".

Color Selecting Using Barcode Scanner

Program(s): PSClient Software Report: 3769

Color Selection by Scanner

An optional feature was added that allows you to use a barcode scanner to make client color selections. This manages the

printing of the labels to be scanned and of course to support actual scanning of those labels to make color selections.

Warranty Request Printing

Program(s): PSClient Software Report: 3771

Reports | Warranty | Warranty Request

Home Owner Copy of warranty will always be sent to the printer.

Warranty Summary Report - New Option

Program(s): PSClient Software Report: 3774

Reports | Warranty | Warranty Summary

A new option "Show Job Address instead of Lot #" was added to the Warranty Summary. If checked, the lot number is replaced with Job Address from construction tab.

Option Selections Screen - Color Attribute

Program(s): PSClient Software Report: 3777

Client Model Option Screen

Valid option selections (non zero qty) can be displayed in a user definable color. Note: this color will override the individual special option color.

Viewing E-Mail Attachments

Program(s): PSClient, Eclare, Gemini Software Report: 3783

File | E-Mail / FTP Manager | Show

Added a new button called "View Attachment" to the 'Show' window. Attachments are in .PDF format. If Adobe Acrobat Reader (TM) or other appropriate reader/viewer is installed and properly associated with the .PDF file extension, selecting the View Attachment option will launch the reader/viewer and display the attached e-mail file. NOTE: Requires optional PDF/EMail module.

User Pre-Defined Send Modes for Reports

Program(s): PSClient, Eclare, Gemini Software Report: 3785

Reports Preview / Batch Mode

Made a number of changes regarding how certain previewed reports are to be printed and/or sent to vendors via FAX, E-mail and/or FTP using the new "Send" option. "Send" combines multiple distribution options within a single function. In Vendor File Maintenance | Contacts, each vendor's record now contains structure which allows users to pre-define how reports are to be distributed. NOTE: Requires optional PDF/EMail module.

Current Vendor Contacts (and Reports) with Send Functionality:

GEM:AP Open (AP Open Items Report)

GEM: P.Orders (Purchase Orders Report)

PSC:Warranty (Warranty Request Report)

PSC:Project (Trade Contractor Scheduling Report)

Option Display Groups

Program(s): PSClient Software Report: 3794

Maintenance | Master Option Maintenance | Edit | Option Display Group

A new field has been added to the Master Option record called "Option Display Group" and references a user definable list. The purpose of this is to control what is displayed in the Client Model Option list.

If an option is assigned to a group, it will only appear in the list if one of the following is true:

1. It is the first option by number in the group. The first option will always be displayed.

2. If not the first, but the first option in the group has a non-zero quantity, then the current option will be displayed.
3. If the current option has a non-zero quantity, then it will display regardless of what the first option in the display group has.

User Security Related to Option Selections

Program(s): PSClient Software Report: 3795

File | Supervisor | User Maintenance | Option Classes Access

We have added the ability to restrict by user which options they will see when in the Client Model selection window. These choices are made in the File | Supervisor | User Maintenance window. When your data is converted to version 17, all users have full access to all Option Class.

Expanded User Security

Program(s): PSClient Software Report: 3798

File | Supervisor | User Maintenance

We have overhauled the security in PSClient to allow for much more selectivity. Please see the version 17 manual (located on your Upgrade 17 CD) for a complete explanation.

Image Display Changes

Program(s): PSClient Software Report: 3801

Maintenance | Model | Images

The image control has been changed to scale (maintain aspect ratio) images according to the original picture.

Color Codes - Import / Export

Program(s): PSClient Software Report: 3810

File | Supervisor | Export | Export Model Option Pricing

File | Supervisor | Import | Import Model Option Pricing

We have added "color codes" to the Import and Export of Model Pricing. This will allow you in a spreadsheet to modify the color choices that are assigned to different model options.

Copying Text from Option for Change Orders

Program(s): PSClient Software Report: 3815

Client | Transactions | Change (Change Orders)

This allows you to 'duplicate a standard option text' with the click of one button.

Remapping of Users Dates Expanded

Program(s): PSClient Software Report: 3824

File | Supervisor | Remap User Dates / Entries

This utility has been expanded to handle text in addition to the newer dates in this release.

Exchange Information Company Number Required

Program(s): PSClient, Eclare, Gemini Software Report: 3828

PS Client - Maintenance | Subdivisions & Lots | Lot Inventory

Eclare - Jobs | Job Maintenance

You must now define in both PSClient (subdivision and lots area) and Eclare (job header area) which company number Exchanged information must go to.

**** WARNING**:** VERY IMPORTANT! YOU MUST PROCESS ALL PENDING EXCHANGE INFORMATION BEFORE

UPGRADING TO VERSION 17. Information that's been exchanged but not retrieved prior to upgrading will be lost.

Client Profile Choices Increased

Program(s): PSClient Software Report: 3835

File | Supervisor | Configuration | Client Profile | Edit

Client Profile selections increased from 9 to 26 entries.

Color Selection from Client's Model Options

Program(s): PSClient Software Report: 3847

Client | Change | Model Options | Color Choice

"Color Selection" button was added on the Client's model option detail window. When clicked, this will bring up the color selections related to the specific option.

Activity Report Check Box

Program(s): PSClient Software Report: 3852

Report | Sales | Activity Report

Added a new checkbox "Prefix Job Address with Lot Number" to report prompt.

Client Profile Report Enhancement

Program(s): PSClient Software Report: 3854

Reports | Client Profile

The filter for "Client Status" has been expanded to allow the selection of more than one status for report. Thus eliminating the need to run a separate report for S,D,H,M etc.

Warranty Summary Report - Sort Changed

Program(s): PSClient Software Report: 3855

Reports | Warranty | Warranty Summary

There is a new sort option to show the report by subdivision, Client Name and Due Date.

ToDo List Shows Client Information

Program(s): PSClient Software Report: 3907

ToDo List

The "Show Client" button was added to give flexibility in changing/updating the ToDo's. This feature interacts when accessing a client transaction or client header. Depending on the security settings you may not have access to the [Go To] button specifically where transactions are related to warranty updates.

Scheduling Structure Allows for Multiple Units in a Building

Program(s): PSClient Software Report: 3952

Clients | Change | Schedule | Multi-Unit Primary Job

A new structure has been established allowing a scheduling job (Building) to have additional scheduling jobs (units) to be associated together. The purpose of the function is to promote a method to release payments of specific units within a building while maintaining the information at the building level. Specifically a "Task" in a building schedule will automatically update the same related task(s) within all units.

Warning Message Upon Pending Model Option Changes

Program(s): PSClient Software Report: 3973

Client | Header | Exchange

We have added a warning message PRIOR TO EXCHANGE if a client has pending Model Option changes that have NOT been saved.