

Additional Contact Fields Added

Program(s): PSClient, Eclare, Gemini Software Report: 3941
Gemini | Accounts Payable | Vendor List Maintenance | DBA Tab
PS Client -- Clients | Transactions | Client Header
PS Client -- Scheduling | Maintenance | Vendor List
Eclare -- Maintenance | Vendor

Added the ability to select a specific contact on reports and documents Send options when multiple contacts are available.

Color Selection "Addendum"

Program(s): PSClient Software Report: 3974
Clients | Transactions | Client Header | Model Options | Color Choice | Select Colors

Added the ability to mark Client Color Selections as being Color Addendums using a new "Color Addendum" checkbox. Once color selection changes are completed, one or more Change Orders with the new color information will be created. The Change Orders can then be saved as part of the Client Contract as a record of those changes.

Warranty Bulk Updating

Program(s): PSClient Software Report: 4010
ToDo's | Warranty Updating

Added a new "Warranty Bulk Updating" function to the "ToDo's" menu. Although it's dealing with warranties, the way it operates is very similar to the Quick Schedule Update function under Scheduling.

Recalculation Button Added For Model Option Cost Plus Markup

Program(s): PSClient Software Report: 4034
Maintenance | Models | Insert/Change | Change

A "Recalc" button was added to the right of the Retail Price field. When clicked, the retail price is recalculated based on the cost and markup information either at the master option level or model level if it is marked to override.

Vendor Auto Contacts

Program(s): PSClient Software Report: 4059
Gemini -- AP | Vendor List Maintenance | Insert/Change
Eclare -- Maintenance | Vendors | Insert/Change
PS Client -- Scheduling | Maintenance | Vendor List | Insert/Change

Added two new default "Auto Contacts" to the vendor maintenance Contacts tab, "Punch-out" and "Orientation". Both are for PSClient Warranty use but both the Gemini and Eclare programs have also been updated to handle vendor data Exchange operations between the programs.

New Status Sold-Contingent

Program(s): PSClient Software Report: 4093
Clients | Transactions | Client Header

Added a new "Sold-Contingent" customer status. Several reports support the new status.

TxText Usage Added for Warranty Request

Program(s): PSClient Software Report: 4153
Reports | Warranty | Warranty Request

Expanded the Print Warranty Request option to be able to use TxText documents. This will allow more user control over the appearance of the Warranty, Punch-out and Orientation Request reports. Note that each type of document uses it's own TxText document (Warranty.tx, Punch-out.tx and Orientation.tx respectively) so that it may be further customized.

Warranty Contact

Program(s): PSClient Software Report: 4228
Reports | Warranty | Warranty Request

Added vendor contact information to the Warranty Request report. Contact information will be used if it has been entered. Otherwise, the vendor's name is used.

Vendor Listing Report

Program(s): PSClient, Eclare Software Report: 4257
Eclare -- Reports | Vendor Related | Vendor Listing
PS Client -- Reports | Setup Reports | Master Vendor List

Added report filter options to the Vendor report to, effectively, allow a shorter report. New filter checkbox options are "Show Vendor Full Address", "Show Linked Contacts", and "Show non-Linked Contacts".

ToDo List

Program(s): PSClient Software Report: 4264
ToDo's | ToDo List

Changed the program to display a message, "Work Order is marked as done." when the ToDo type is set to Warranty and a work order number which has been marked as "Done" is entered in the W/O # field. Users with proper security can subsequently view/edit the work order.

Expanded Phone Fields for Customer

Program(s): PSClient Software Report: 4269
File | Supervisor | Configuration | Misc Info
Clients | Transactions | Client Header

Added a third phone number field to the Client header and changed all phone number labels to be user definable.

Warrant Request Form

Program(s): PSClient Software Report: 4278
Clients | Transactions | Client Header | Model Options
Reports | Warranty | Print Warranty Request

Added a new "Plan Number" field to the upper right side of the report header. It is defined on the Model Options window.

Construction Graph Calculations

Program(s): PSClient Software Report: 4286
Scheduling | Graphs | Construction Graph Report

Added new formula which assumes that all incomplete tasks are proceeding as planned. To use the calculation method used in version 18 and prior software versions, select the report option "Base Actual on Completed Construction".

Trade Contractor Projection Report

Program(s): PSClient Software Report: 4295
Scheduling | Trade Contractor Projection Report

Added a new feature, "Show Changed Tasks Only", to the Trade Contractor Projection Report setup window. When selected, the new option narrows the report output to show only those tasks that have changed since the last report.

Master Options Print Groups

Program(s): PSClient Software Report: 4309

Maintenance | Master Options | Insert/Change

Changed logic to allow setting a "Print Group" when editing "Lot" type items.

Customer Deposits

Program(s): PSClient Software Report: 4320

Reports | Management | Customer Payment Report

Added a new "Include Deposits Due" checkbox option to the report setup window which, when checked, will print a line showing the four possible deposit amounts and due dates.

Warranty Summary

Program(s): PSClient Software Report: 4322

Reports | Warranty | Warranty Summary

Changed the sort by "Vendor/Tech" to sub-sort by "Subdivision" before the due date. Also added subdivision name to sub-headers if sorted on third option (by vendor/tech).

Send Color Selections

Program(s): PSClient, Eclare Software Report: 4323

Eclare -- Maintenance | Setup Maintenance | Master Product Groups

PS Client -- Reports | Color Selection | Send Color Selections to Vendors

Added a new option that will allow you to "Send" a client's Color Selection information to your vendors. The vendors are determined by schedule task vendor assignments and a new checkbox option in the Product Group called "Send Color Selections."

The new report will use the "Send" functionality within the "Gemini: P.Orders" Vendor Contact information.

"+" Key to Act as Tab Key

Program(s): PSClient Software Report: 4327

File | Terminal Setup

Added a "Use Keypad Plus Key as Enter" checkbox option to the terminal configuration General tab. When checked, the numeric keypad "+" key is treated as if it were a Tab key. Changes to the checkbox do not take effect until the program is exited and restarted.

Client Emails

Program(s): PSClient Software Report: 4338

Client | Transactions | Insert/Change

Added a new "EMail" button to the Transactions window that will call the Windows default EMail program and send the transaction text as the body of the EMail. Note, after transaction text is sent to the EMail, changes made to it in the body of the EMail will not be updated in the client transaction.

Picture Sub-directories

Program(s): PSClient Software Report: 4346

Maintenance | Subdivison & Lots | Insert/Change | Image Maint | Insert/Change

Changed the Subdivision Image Maintenance option to allow you to store images in sub-folders as well as the "Pictures" folder.

Email, FAX and FTP Support for TxText Documents

Program(s): PSClient, Eclare, Gemini Software Report: 4349

Eclare -- File | Print Vendor Letters

Gemini -- File | Print Vendor Letters

PS Client -- File | Print Client Letters

Added a new utility to allow users to either EMail, FAX, and/or FTP documents and letters directly from their program. Users will also have the option to print address labels for any letters.

Warranty Report

Program(s): PSClient Software Report: 4354

File | User Maintenance | Insert/Change

Added a phone number field to the "User" record. When entered for your Warranty Tech, the phone number will appear next to the Warranty Tech's name on Warranty Requests.

Quick Schedule Updates

Program(s): PSClient Software Report: 4355

Schedule | Quick Schedule Update | Preview

Added a "Preview" button to provide the ability to preview and, if desired, print the Quick Schedule information.

Co-Buyers Information

Program(s): PSClient Software Report: 4357

Client | Transactions | Client Header | Co-Buyers

Added two additional sets of "Co-Buyer" fields to a new "Co-Buyers" tab. Co-Buyer fields located on the General tab in previous versions have been moved to the new tab. Added new Co-Buyer field contract tokens to the TxText module.

Send Client Letters

Program(s): PSClient Software Report: 4358

File | Print Client Letters

Maintenance | Administrator | Tx Document Maintenance

Added an option to send letters to clients using TxText. Once customers are tagged you will be able to print the letters, labels, and/or e-mail the documents to them.

Warranty Request Report

Program(s): PSClient Software Report: 4366

Reports | Warranty | Warranty Request

Changed the "Superintendent" label on the report signature line to say "Work Approved By" to better handle the different types of reports.

Last Saved Contract

Program(s): PSClient Software Report: 4379

Clients | Transactions | Client Header | Contract

Added a new value to the upper right side of the Contract tab called "Last Saved Contract". The non-editable field contains the amount of the contract the last time that a "Save Contract" operation was performed in the Contract tab. The value is also available in the Client Profile Export file and as a TxText document token.

New Fields in Header

Program(s): PSClient Software Report: 4380

Clients | Insert/Change

Clients | Transactions | Client Header

Added new fields to the Client header area as follows:

1. General tab -- Marital Status (M/S field) for primary buyer
2. Co-Buyers Tab -- Marital Status (M/S fields) for the three Co-Buyers
3. Model window -- Plan Number
4. Departments | Design Date tab -- Two user defined time fields
5. Departments | Finance Date Tab -- Two user defined time fields

Client Header Additional User Fields

Program(s): PSClient Software Report: 4381

File | Supervisor | Configuration

Client Browser

Reports | Client Detail Report

Reports | Client Profile Report

Added label fields for six new user defined links on the Configuration User - General, User - Construction, and User - Finance tabs. Added a new "User Ref" filter field to the top of the Client browser window. When a specific user is selected, only those clients referenced by that user in one of the User related fields will display. Client fields that are checked are the Estimator, Closing Agent, Designer, Co-Designer and the six new user defined user links. Also updated TxText tokens for the new fields.

Client Header - Lender Representative

Program(s): PSClient Software Report: 4382

Clients | Transactions | Insert/Change | Departments | Finance

Added new fields associated with each of the two lender fields on the finance tab. These fields are free form entry (you can type whatever you want) or they can be filled in from the contact list of the selected lender.

Client "Loan Type"

Program(s): PSClient Software Report: 4383

Maintenance | Administrator | Loan Types

Previous version client "Loan Type" was changed to be a full user defined list, removing the restriction of allowing only nine loan types.

Client Transaction To-Do Codes

Program(s): PSClient Software Report: 4392

Maintenance | Administrator | To-Do Descriptions

Reports | Setup Reports | Master Client To-Do Types

ToDo's | ToDo List

Clients | Transactions | Insert/Change

File | Supervisor | Global ToDo Maintenance

Expanded the Client To-Do Type codes to add user defined ToDo Types 001 through 999. The new ToDo Type codes will supplement the existing reserved codes (\$, W, etc) currently in use by the program and provide greater user flexibility.

Warranty Entry using Barcode Scanner

Program(s): PSClient Software Report: 4394

ToDo's | Warranty Updating

Added support to use a barcode scanner to receive Client Warranty Requests and mark them Done.

Warranty Web Portal

Program(s): PSClient Software Report: 4409

File | Supervisor | Configuration

File | User Maintenance | Insert/Change

File | View Web Access Control

Clients | Insert/Change

Clients | Transactions | Insert/Change (Warranty)

Clients | Transactions | Insert/Change | Notes

ToDo's | New Transaction Notes

Reports | Warranty | Warranty Summary

Scheduling | Maintenance | Vendor List | Insert/Change

Added support for new "Web Portal" software option. It will allow vendors, technicians and homeowners to access warranty requests through the internet. Through use of this powerful tool, customers can see the status of warranty issues while vendors/technician can print and accept warranties.

Data Location

Program(s): PSClient, Eclare, Gemini Software Report: 4455

File | Select Data Path

Changed all our programs to allow program and data files to be located separately. However, we still require the program's data structure to remain together. This includes all the DATA### company folders as well as a few of the program's root files--COMPANY.TPS and Gemini's COLINK.TPS files, for example.

TxText Documents

Program(s): PSClient Software Report: 4457

File | Mail Processing - Legacy

Maintenance | Administrator | Contract Text Form

Maintenance | Administrator | ToDo Tasks

Maintenance | Administrator | Document Maintenance - Legacy

Reports | Setup Reports | Master File Mail / ToDo Tasks

Removed all Microsoft Word* links and references from the program.

* Microsoft and Word are registered/copyrighted trademarks of the Microsoft Corporation.

Display Order of Client Documents

Program(s): PSClient Software Report: 4464

Clients | Insert/Change | Client Documents

The clients' list of documents can now be sorted by Filename or Date/Time.

Export Profile

Program(s): PSClient Software Report: 4481

Reports | Client Profile Report

Added two more output fields to the export section of the Client Profile Report, "Pre-Qualify" and "Web User".

Ability to Edit Saved Contracts

Program(s): PSClient Software Report: 4487

File | Supervisor | Configuration | General Information tab

Clients | Insert/Change | Contract tab | Print Contract

Added an "Allow Contract Edit" option to the General Information configuration window. If checked, it allows the user to edit

the contract prior to printing it.