



**JC: Relocate Contract Amount on Job List Report**

Program(s): Gemini Software Report: 5024

JC | Reports | Job List Report

Relocated "Contract Amount" to the job summary line if the "Show Cost to Date" option is checked. The contract amount is rounded to the nearest dollar due to space limitations.

**AP: Lien Waiver Management**

Program(s): Gemini Software Report: 5027

AP | Process AP Checks

AP | Waiver of Lien Log

AP | Reports | Waiver of Lien Log

Changed the Waiver of Lien Log module to more closely integrate with the Process AP Checks module to enable users to more positively manage vendor holds and track lien waivers due in.

Process AP Checks:

- Added a "Check for Outstanding Waivers of Lien" checkbox to the Print Proofing report setup window. When checked, a warning will be printed on the Proofing report if a required waiver has NOT been received (although the amount due to the vendor will still be added to the total check-run amount).

- Print AP Checks

- Added a new "Hold vendors with outstanding lien waivers" checkbox to the AP Checkwriter setup window.

- Added lien holds to the Checkwriter summary area at the top of the setup window ("Warranty/Manual/Lien Holds").

When the "Hold vendors..." checkbox option is checked, affected vendor check(s) will not be printed but their invoice payment selections will remain in the AP Check Run for future release and printing.

Waiver of Lien Log browser window:

- Added a new "R" (Received) column in which an "N" will appear if a waiver has NOT been Received.

- Added a new "Show Received" checkbox.

- Added new "Receive" and "Receive Tagged" buttons which will set the highlighted line and Marked lines, respectively, to Received.

- Added a new "Delete Tagged" button which will Delete all Marked lines.

Waiver of Lien Log Report:

- Added a new "Show Unreceived Only" checkbox.

- Updated report output to show an asterisk "\*" (far left) for liens which have not been marked received.

- Changed window date prompt descriptions to be "... Check Date" instead of "... Doc Date".

**AP, PR: Export AP 1099-MISC and PR W2 Form Data**

Program(s): Gemini Software Report: 5030

AP | Vendor List Maintenance | General

AP | Reports | 1099 Forms / Magnetic

PR | W-2 Operations | Export W-2

AP: Added an "Export 1099" option to the 1099 Forms/Magnetic browser Action dropdown menu. NOTE: Form 1099 "Name" and "Alt Name" information which will be exported depends on the 'Use for 1099' checkbox setting to the right of the 'DBA Name' field in the vendor's Vendor List Maintenance file header. If the 'Use for 1099' checkbox is checked, then the 1099 "Name" will contain 'DBA Name' field information and "Alt Name" will contain Vendor Name field information.

PR: Added an "Export W-2" option to the W-2 Operations menu. In addition to federal tax informaton, State and Local tax information is also exported. The exact columns which are created during data export depends on what is contained within the data file for the selected year. Exported data includes any manual W-2 file changes users have made in the W-2 Operations

When either of the above file export options are selected, a File Location field will appear in which the user must enter the file location and name. Data will be subsequently exported in .CSV (Comma Separated Value) format.

**JC, PO: Require Reason Code for Change Orders / User Document Tracking**

Program(s): Gemini Software Report: 5037

File | Supervisor | Configuration

File | User Maintenance

JC | Change Orders | Insert / Change

PO | Add / Edit Document | Insert / Change

Added a new "Reason Code Required for Change Orders" check box to the JC Configuration tab. When checked, a Reason Code must be entered to be able to save a JC Change Order.

Added a new user "Initials" field to the User Maintenance General tab which will subsequently be used for document tracking in both the JC Change Order and the Purchase Order maintenance modules.

Added new "By" user initials display fields to the:

- JC | Change Orders | Insert / Change window (right of Change Order number). When a user creates a new Change Order, their user ID will be permanently attached to the Change Order document.

- PO | Add / Edit Document | Insert / Change window (left of the Distribution box). The program has recorded this information for PO's for a number of versions but now it is visible.

**PO: New Filter Option**

Program(s): Gemini Software Report: 5048

PO | Maintenance | PO Viewer

Added a new "PO Viewer" research tool option which allows POs to be selected for review using user defined filters. When selected, the PO Viewer automatically opens the new "PO Viewer - Set Filters" window used to define which PO's will be loaded for rev

Filters initially default to include all POs. "Doc Date" and "Approval Date" date fields are mutually exclusive. When either set of date fields are defined, the other set of date fields are dimmed out. Once user filters are defined, clicking on "OK" will force the desired POs to display in the "PO Viewer" browser window.

The "Update View" button reopens the PO Viewer - Set Filters window to allow the user to redefine PO selection filters. If just reaccepted with no changes, the current list of POs will reload.

The "Edit PO" button performs the same function as "Change" on the PO | Add/Edit Document window. It allows the user to view full PO detail as well as make changes. NOTE: Existing POs can only be viewed and changed, they cannot be deleted nor can new POs be inserted (you must use the PO | Add/Edit Document function for these actions).

- Clicking on the "OK" button, will update a changed PO as well as all related master/addendum POs.
- Changes only apply to edited documents. Other document changes will not be reflected in the list until a new "Update View" is done.
- Clicking on a given column header will sort on that column and the selected column header title will turn blue. For all except first two columns (Doc Num and Adn [Addendum]), POs will be sorted based on whatever information is in the selected column and sub-sorted by Doc Num & Adn.
- The Adn column sorts by Addendum number only. Therefore, related documents may not appear together.
- "Records: ####" in the lower right corner of the viewer browser window displays the number of documents that are current

**ALL: New Pop-up Calendars**

Program(s): PSClient, Eclare, Gemini Software Report: 5050

Eclare: All

Gemini: All

PSClient: All

Updated pop-up calendar window features in all locations within all programs as follows:

- Displays previous and next month's dates as space permits.
- Clicking on a day within a Previous / Next month will move to and display that month's calendar.
- Double-clicking on a day within a Previous / Next month will select it and close the calendar.
- Keyboard Left, Right, Up, and Down arrows change the Day/Date focus.
- Shift Left / Right arrows will change the Month while Shift Up / Down arrows will change the Day (previous/next, respectively).

(previous/next

- The calendar will move backward or forward a month if the end of the display range is reached. This is primarily for mouse users who have a wheel which will change calendar Day values.
- Added a "Today" button which, when clicked on, will instantly reset the calendar to the current computer date.

#### **AP, AR: Add Invoice # Tabs to Payments Browsers**

Program(s): Gemini Software Report: 5053

AP | Vendor List Maintenance | Payments

AR | Customer List Maintenance | Payments

AP: Added an "Invoice #" tab to the Payments window browser which displays information in invoice number order.

AR: Added an "Invoice #" tab to the Payments window browser which displays information in invoice number order.

NOTE: Invoice numbers in both modules are considered to be "string" data and are sorted accordingly. Therefore, invoice number "5" would be sorted after/below invoice number "100" (because "5" comes after "1").

#### **PO: Price Book Description Search**

Program(s): Gemini Software Report: 5057

PO | Add/Edit Document | Insert/Change | Insert/Change | Price Book #

PO | Price Book

Added a "Search" filter field to the Price Book browser window. If a value is entered, the browse list will be restricted to those items whose Description contains the specified case insensitive value. For example, "2X8" would match "1x2x8" as well as

#### **All: Company Log in**

Program(s): PSClient, Eclare, Gemini Software Report: 5063

Changed the information window that appears if other users are active when the supervisor tries to log in. The window will now show a list of users in a browse list.

#### **PO: Add New Columns to Browser Window**

Program(s): Gemini Software Report: 5085

PO | Add/Edit Document

Added three new columns to the PO documents browser window, "Rcv Date", "Rcv Invoice", and "Rcv Amount". Additional columns are hidden by default but can be unhidden by right-clicking in the PO documents browser area and selecting 'Select Columns to Show' on the menu which will appear. Column comments:

- "Rcv Date": If a PO has been received into AP, the date it was received. Will only display if a payment has been received into AP. If one or more payments have been made against a given PO, a plus sign "+" will appear after the date but only the first payment will display. If the PO has been paid in full, the plus sign will be omitted.
- "Rcv Invoice": Received AP invoice number.
- "Rcv Amount": Amount of the first invoice received into AP.

**GL: Job Closeout Accrual**

Program(s): Gemini Software Report: 5088

GL | Job Closeout Accrual

Added a new "Save Worksheet" button which provides the ability to save the Job Accrual Work Sheet "User Amount" information. If there is already a Work Sheet saved for a given job, a prompt will appear asking if the user wants to load it when they select that job.

**GL, AP: Copy Header Description to Detail Description**

Program(s): Gemini, Other Software Report: 5090

File | Supervisor | Configuration

GL tab: Added a new "Default GL Header Desc to Detail Desc" checkbox. If it is checked and a new Detail line is inserted, information in the Header Description field will automatically be copied to the Detail Description field for subsequent editing if desired. Please note that the Detail Description will be truncated to the first 30 characters of the Header Description (which can subsequently be edited if desired).

AP tab: Added a new "Default AP Header Desc to Detail Desc" checkbox. If it is checked and a new Detail line is inserted, information in the Header Description field will automatically be copied to the Detail Description field for subsequent editing if

**File: Exchange**

Program(s): Gemini Software Report: 5091

File | Exchange | Retrieve Jobs

Added a warning message if the "Update Job Budget" checkbox option on the Retrieve Jobs setup window is checked. The concept is to prevent/protect Gemini jobs that have already been budgeted from being updated/changed when using the Exchange option to import Purchase Orders from Eclare.

**JC: New Reason Code Report**

Program(s): Gemini Software Report: 5094

JC | Reports

Added a new "Change Order by Reason Code" report. This allows the ability to classify change orders based on the user definable classification. This change also relates to another enhancement which allows the user to group the reason codes. "Reason Codes" are defined and effect both Change Orders and Purchase Orders

**JC: Lien Waiver Report Enhancement**

Program(s): Gemini Software Report: 5096

AP | Reports | Waiver of Lien Log

Added a new "Job Number" field to the report setup window. If a job number is entered, only waiver log entries for that job will be printed.

**JC: Change Order Type Numbering**

Program(s): Gemini Software Report: 5098

File | Supervisor | Configuration | JC

JC | Change Orders | Insert/Change

JC | Reports | Change Order Cost Code Summary Report

JC | Reports | Change Order Detail Report

Replaced the JC Change Order Insert button used in previous versions of Gemini with two different insert buttons titled "Insert Customer C/O" and "Insert Administrative C/O". The "Insert Customer C/O" creates Change Orders numbered 001 to 999 while the "Insert Administrative C/O" creates Change Orders numbered 1000 and up (higher starting numbers can be specified by the

A new button has been added to the Change Order entry/edit window which will read either, "Insert Customer C/O" or "Insert Administrative C/O", depending on an existing C/O's type or the "Insert..." option selected. When selected, it causes the Change Order number sequence to automatically change to the new Change Order type numbering.

CONCEPT: The new "Insert Customer C/O" option is relegated to Change Orders created "outside the company" which are signed/accepted by the customer or his/her representative. For example, the customer wants to upgrade from laminate to granite countertops. The "Insert Administrative C/O" is relegated to Change Orders created "inside the company" to deal with 'internal' issues. For example, persons unknown have damaged a finished wall which must be repaired and repainted.

Auto-numbering for both Change Order types are handled as Change Order numbering has been handled in previous versions. When checked, a new "Auto Change Orders uses Administrative Numbers" configuration check box on the JC tab would cause all Automatic Change Orders (including POs) to use the high range of numbers. Otherwise, low range.

A new "C/O Type" pull-down menu option has been added to both the Change Order Cost Code Summary Report and the Change Order Detail Report which allows the user to specify the report C/O output type.

### **JC: Import New Jobs**

Program(s): Gemini Software Report: 5102

File | Supervisor | Data Maint | Master Files Import

Added a new option to import Job headers which conform to the .CSV (Comma Separated Value) file format.

### **All Programs: TxText Editor**

Program(s): PSClient, Eclare, Gemini Software Report: 5106

Eclare and Gemini: File | TxText Maintenance

PSClient: Maintenance | Administraor | Tx Document Maintenance

Updated the TxText Editor "Insert Token" option menu. A new "tabbed" browser menu consolidates tokens into Source groups and makes searching for a given token much easier.

Source group token lists can, effectively, be further reduced by entering text into a new "Search" field and tabbing off, leaving only those tokens that contain matching text in either the "Token" or "Description" columns.

### **JC: Job Closeout List Change**

Program(s): Gemini Software Report: 5107

JC | Job List Maintenance | Insert/Change

JC | Maintenance | Close Out List Maintenance

JC | Maintenance | Global Update Job

JC | Reports | Job List

JC | Reports | More Reports | Job Close Out List

Increased the Job Closeout List ID from two to four numeric characters.

### **ALL: Removed "Send to Google" Backup Functionality**

Program(s): PSClient, Eclare, Gemini Software Report: 5108

Eclare: File | Backup Data

File | Supervisor | Program Setup

File | Supervisor | Restore Data

Gemini, PSClient: File | Backup Company Data

File | Supervisor | Configuration

File | Supervisor | Restore Company Data

Removed all Google (TM)\* related configuration, backup, and restore functionality from all our programs. Google has changed their authentication interface and it will no longer accept the authentication process used in our programs.

There is a "work-around". Users can download Google's Google Drive (TM)\* online storage service application and set up a folder to be synchronized for file upload to "the cloud". Users can then make a backup through their Prosoft program's backup function and save it in the synchronized folder. The Google Drive application will automatically upload/save it to the cloud.

If you need assistance downloading/setting up Google Drive, please access setup information on Google's web site through your internet browser or contact your network or other computer professional for assistance.

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### **ALL: User Defined Backup Locations**

Program(s): PSClient, Eclare, Gemini Software Report: 5109

Eclare: File | Backup Data

File | Supervisor | Restore Data

Gemini, PSClient: File | Backup Company Data

File | Supervisor | Restore Company Data

Added a new "Predefined Locations" drop-down menu option to the Backup Company Data window. A new "Define" button to the right of the new field allows users to predefine up to five separate backup locations for subsequent selection when creating a backup. When the "Define" button is selected, a new "Backup Data Setup" window will appear.

- "Insert" allows the user to create and define a new backup location. New backup locations consist of two fields:
  - A forty character "Location" field allows the user to enter a freestyle backup description (for example, 'Weekly Backup', 'My Drive C Backup', and so on).
  - The user can either type in the location where the backup is to be saved in the "Folder" field or can click on the ellipsis box to the right of the field and navigate to and save the drive/folder in which the backup is to be saved.
- "Edit" allows the user to change an existing backup Location description or drive/folder.
- "Delete" allows a predefined location to be deleted.
- The backup location in the first line at the top of the list of backup locations is the 'default' backup location and is the one that will appear when the File | Backup... option is selected. Up and Down arrow boxes allow the user to move a given backup location up or down in the list of backup locations to specify the default backup location.

#### NOTES:

In new installations (when version 2016 and later is first installed), since no definitions yet exist, the only location choice is "Default Location" which will backup to the location noted in the "Backup To" field on the Backup Company Data window.

Backups should not be saved in your company data folders (...\\Prosoft Program Folder\\DataNNN (where NNN = company

### **All - EMail Address List**

Program(s): PSClient, Eclare, Gemini, Other Software Report: 5120

Eclare, Gemini, and PSClient: File | E-Mail / FTP Manager

Added a new "Mail List" button to the E-Mail / FTP Manager window which, when selected, allows users to create a list containing multiple email addresses. In order to use the new function, the optional version 2016 (or later) MailPS program must also be installed (see NOTE, below) and must be run at least one time.

- All Mail List names must start with an exclamation mark (!) followed by a Mail List name consisting of up to a maximum of 40 characters. For example, !My Mail List.
- Each email address must be entered on a separate line (Mail List | Insert/Change | Insert)
- There is no limit to the number of email addresses which can be added to the Mail List as long as the total number of email address characters does not exceed 3,000.
- Mail List names (which must include the exclamation mark) can be added to the Vendor's Contacts list and, when an email document is processed, it will be sent to all the email addressees within the Mail List.
- If an email using a given Mail List has been sent and is subsequently viewed using the Show button, a new "+" box will appear to the left of the To, CC, and/or Reply To fields. Clicking on the "+" box will display the list of email addresses within the Mail List.

MailPS version 2016 program:

- Added Email Address validation to the Show Email window.
- Please note that expansion of the Mail List is done each time an email is sent. If there is a delay in sending an email or if it is resent and the Mail List has been changed since the original email was created, the current Mail List addresses will be used.

NOTE: Your version 2016 program is backwardly compatible with MailPS versions 2015 and earlier. If an earlier version of MailPS is installed, your program and the earlier version of MailPS will work as they worked in prior versions (i.e., the "Mail List" button will simply be inoperative).