Builder Incubator

Gemini 2018

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Builder Incubator

Gemini 2018 What's New

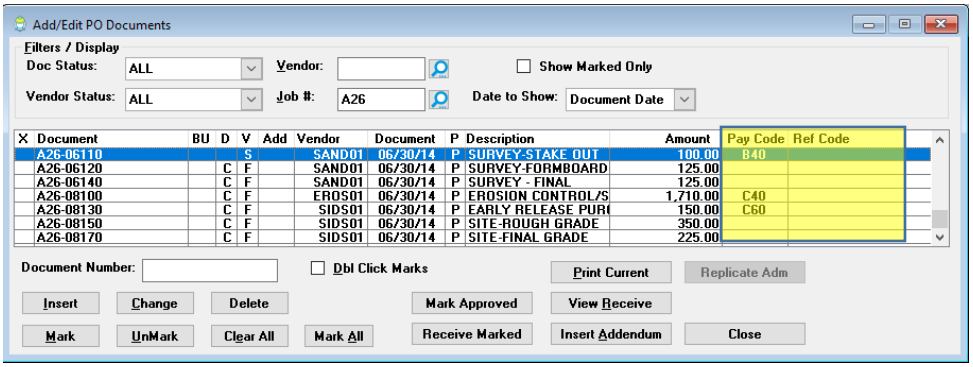
OCT-2018

Release: Gemini 2018d

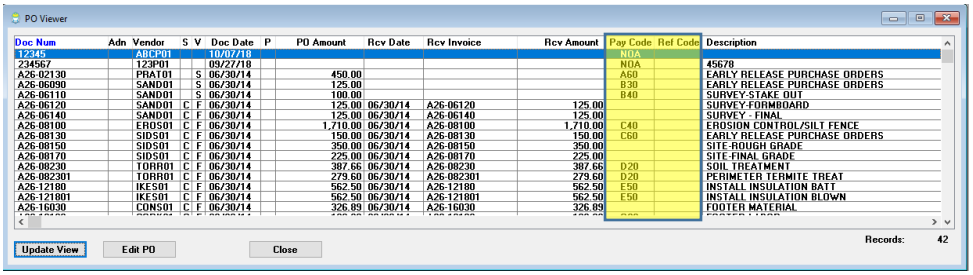
Version: 2018.01.1810.111

PAY Code and REF Code columns added in three windows
Software Report: GEM-29

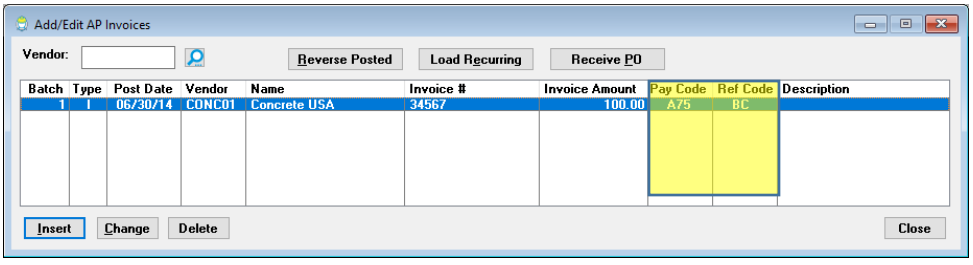
The PAY Code and REF Code have been added to the following windows;
PO | Add/Edit



PO | Maintenance | PO Viewer



AP | Add/Edit



Pay code, Ref Code, Legal Text Logic updated
Software Report: GEM-30

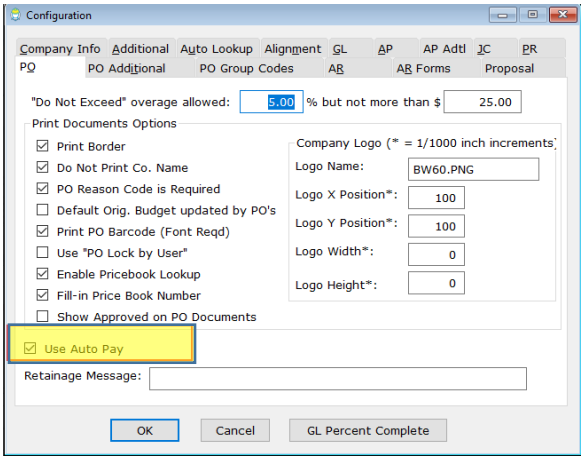
Updated the EXCHANGE logic and vendor default logic to insure Legal Text, Pay Code and Ref Code were handled properly in all situations. Because the Pay Code provides the necessary linking for purchase orders and construction schedule tasks, this logic insures the new BIWebPortal will function as expected.

Rules for the database (an auto pay database)

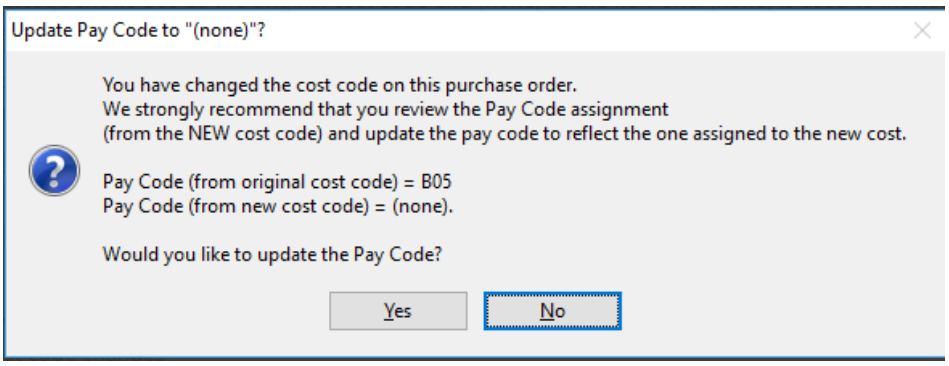
- In FILE | SUPER | CONFIG | PO additional tab – enter the DEFAULT Pay Code for NON-Auto-Pay PO's
- Vendors should NOT have a default PAY CODE set at AP | Vendor List Maintenance
- Cost Codes have the PAY CODE assigned

1. Inserted PO's (PO's added from Gemini)
   - Pay Code will always be from FILE | SUPER | CONFIG | PO additional tab - the DEFAULT Pay Code for NON-Auto-Pay PO's
   - PO Legal and Ref Code will come from the vendor file
   - Doc Date will always be today's date
2. When changing PO's (PO's that were either added in Gemini and/or exchanged from Eclare)
   - Upon opening to Edit - NOTHING Changes
   - Pay Code will remain the same (not update) unless the user ALSO changes the cost code
   - If a NEW vendor is assigned to this existing PO - PO Legal and Ref Code will come from the NEW vendor default
   - Doc Date will NOT update unless manually changed by the user
3. Inserted PO (while the Vendor Filter has a selected vendor)
   - Vendor number prefilled
   - Pay Code will always be from FILE | SUPER | CONFIG | PO additional tab - the DEFAULT Pay Code
   - PO Legal and Ref Code will come from the vendor file
   - Doc Date will always be today's date
4. Exchanged PO's (from Eclare)
   - Pay Code will always be assigned based on the Cost Code
   - PO Legal and Ref Code will come from the vendor file
   - Doc Date will come from the doc date at the Gemini Exchange window
5. PO's processed from PO to AP
   - Data fields will match exactly what was in the PO
6. AP Invoices entered directly
   - Pay Code and Ref Code will prefill based on the Vendor defaults
   - Dates will be based on the "last entry" or todays date (if this is the initial invoice entered)

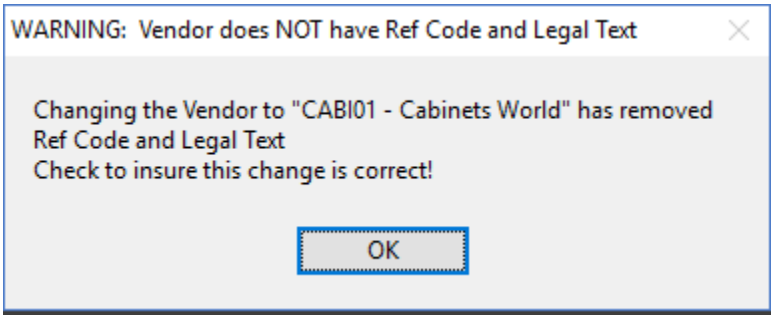
On the CONFIGURATION window (PO tab) we added a check box "Use Auto Pay". This should be checked ON for customers using the BIWebPortal. This insures the PAY code is always assigned based on the COST CODE, even IF the vendors have default pay codes. If a vendor has a PAY CODE assigned at AP | Vendor List Maintenance, the Cost Code will take precedence in assigning a pay code.



Software Report: GEM-30 also added warning messages if PO's are edited, for example if a cost code was changed the user will be prompted to update the PAY CODE.



If a vendor is changed on a PO, the user will receive a warning message regarding changes to the Ref Code and/or Legal Text.

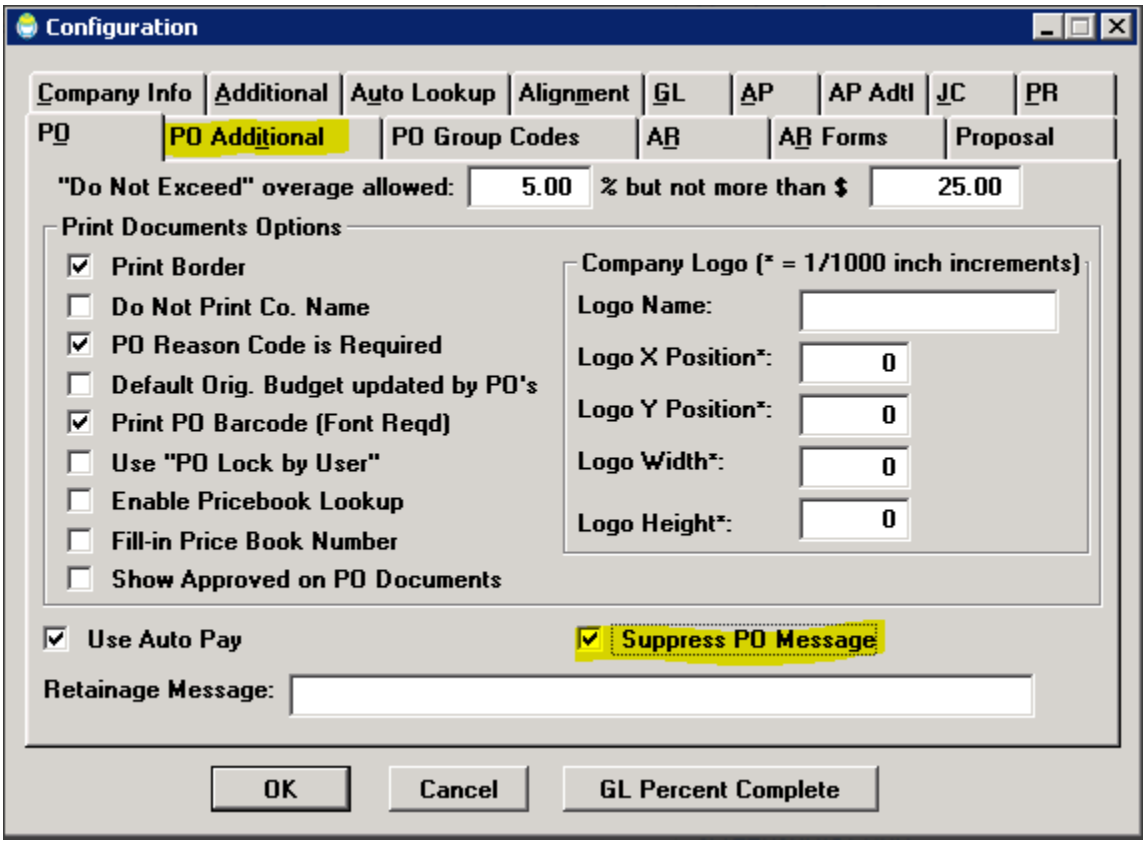


No PAY CODE warning message on Addendums
Software Report: GEM-36

Because PO Addendums are controlled by the Master PO, if a user changes an addendum there is no warning message related to the PAY CODE not matching the cost code assigned pay code.

Suppress warning message for REF CODE and LEGAL TEXT
Software Report: GEM-37

Added a check box at FILE | SUPERVISOR | CONFIGURATION | PO Additional tab
to not provide a message if a vendor is changed on a PO and the REF CODE and LEGAL TEXT could change. Once a builders Gemini defaults are set, they may choose to suppress the warning message.



Gemini 2018 What's New

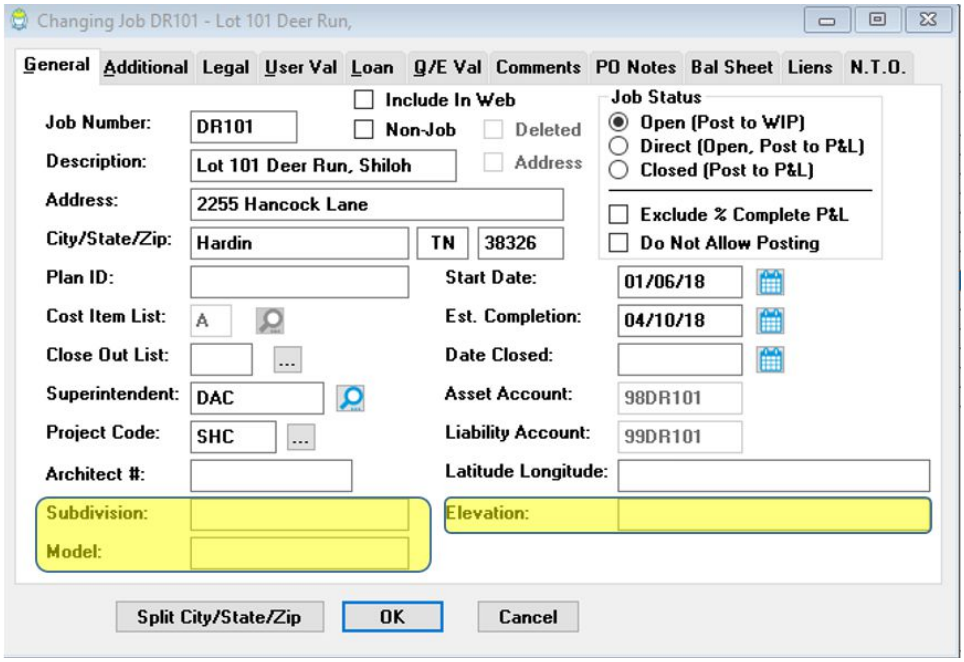
AUG-2018

Release: Gemini 2018c

Version: 2018.01.1808.171

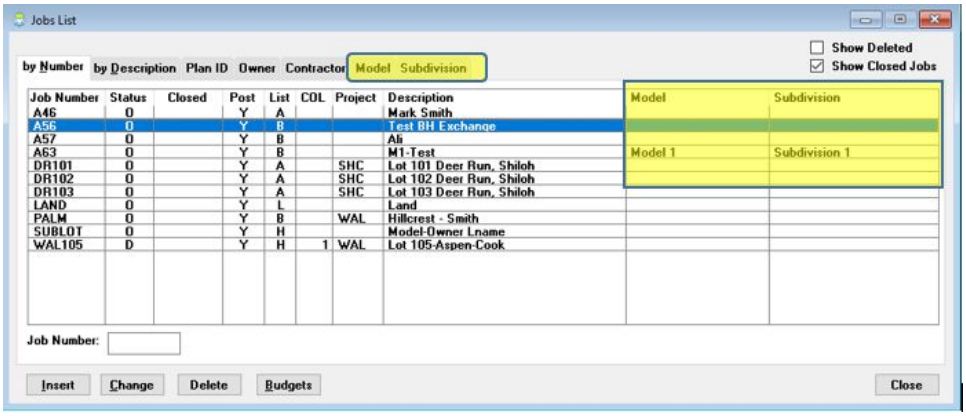
New Fields added to the Job Header
Software Report: GEM-10a

Added new fields to the Job Header to hold the MODEL, SUBDIVISION and ELEVATION. These fields are updated from PSC-ECL exchange. The Subdivision and Model also print on the PO header.



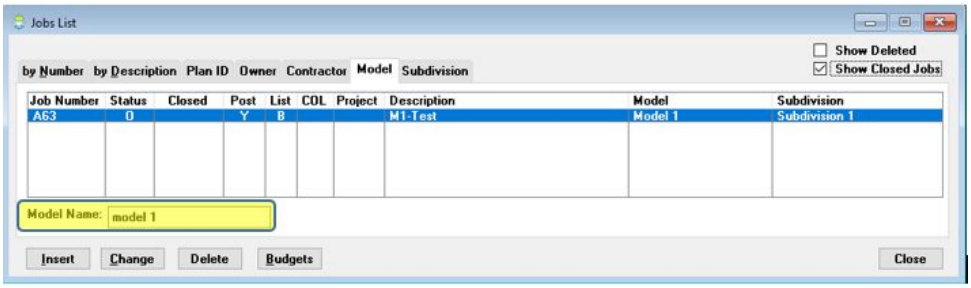
New TABS and Lookup added to the Job Header
Software Report: GEM-10b

Add TABS to the Job List for MODEL and SUBDIVISION



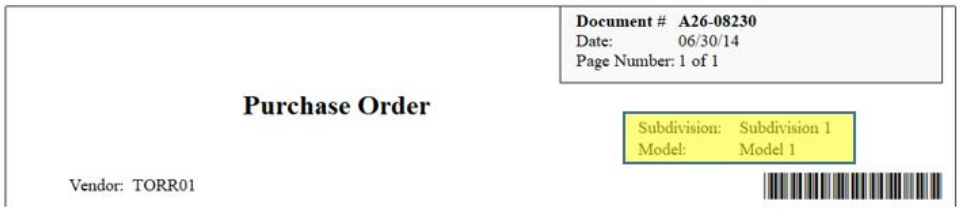
New FILTERs and Lookup added to the Job Header
Software Report: GEM-10c

Added FILTER fields to the Job List for MODEL and SUBDIVISION



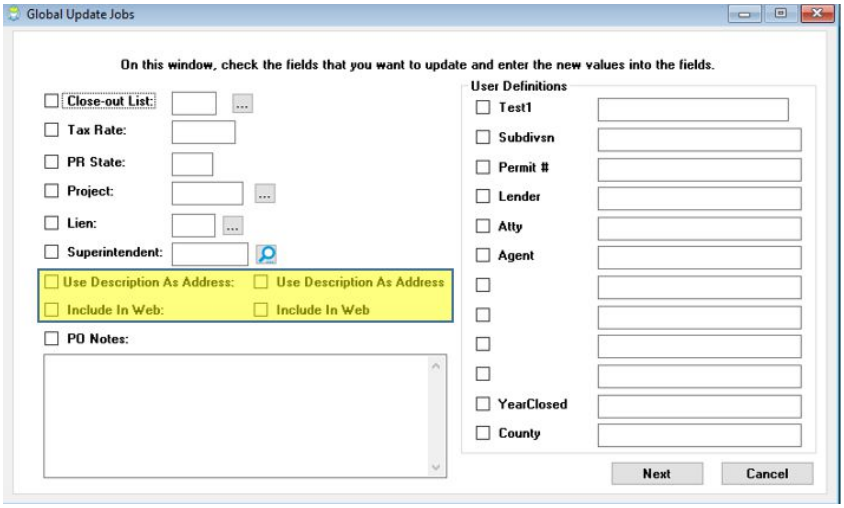
PO's to include the Subdivision and Model
Software Report: GEM-6

SUBDIVISION and MODEL (from the JC Header) will display on the PO's



Job Header – Changes to Global Update Job
Software Report: GEM-10d

Improved the Global Job Update to include the WebPortal fields



Exchange from ECL to GEM - new CONFIRMATION screen
Software Report: GEM-7a

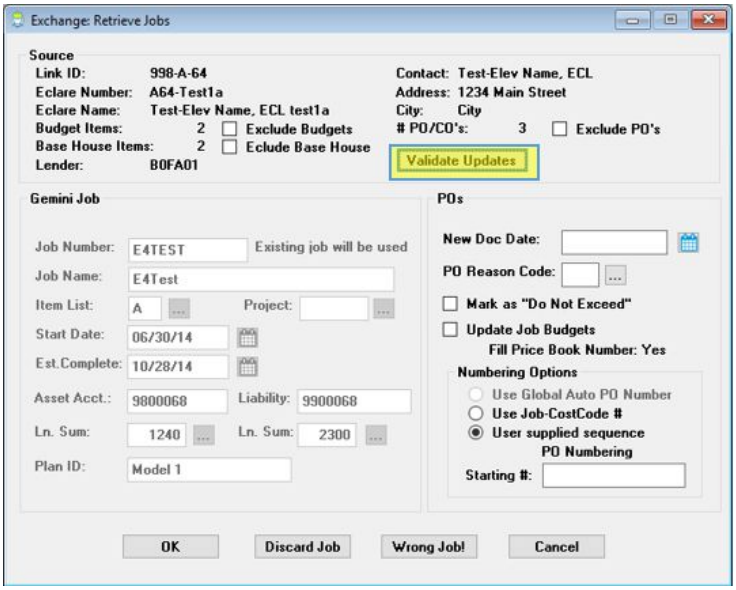
Exchange of the job from Eclare to Gemini will now update 12 of the job header fields.

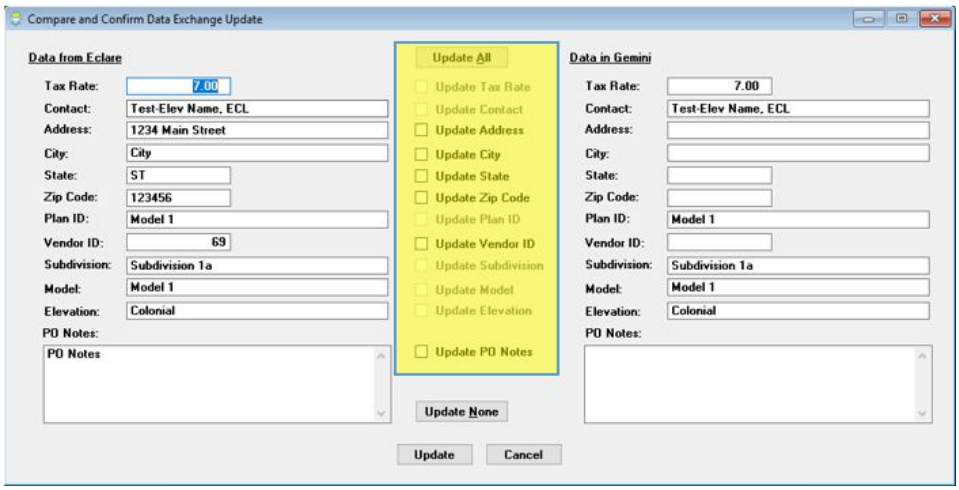
Data from Eclare

- Tax Rate:
- Contact:
- Address:
- City:
- State:
- Zip Code:
- Plan ID:
- Vendor ID:
- Subdivision:
- Model:
- Elevation:
- PO Notes:

Exchange from ECL to GEM - new CONFIRMATION screen
Software Report: GEM-7b

When exchanging of the job from Eclare to Gemini, we added a confirmation screen in case certain job header fields contain values prior to the exchange. This allows the user to individually control the update of job header fields.



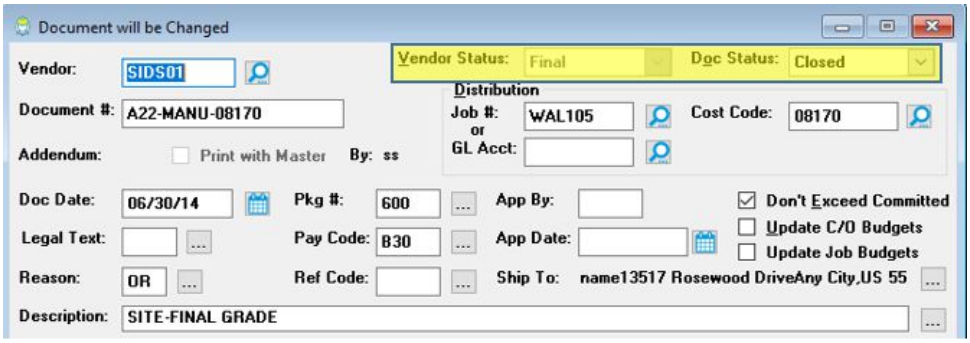


Bug Fixed - Vendor PO Status auto set to FINAL
Software Report: GEM-15

When a PO Doc status is set to CLOSE, the Vendor Status will automatically set to FINAL. This was working all areas except individual PO's received thru the menu AP-Receive PO.

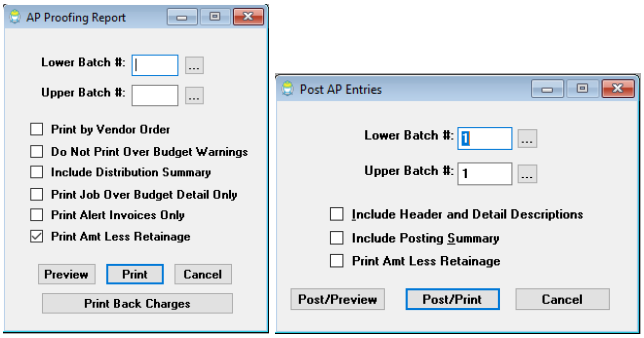
Utility to update PO Status
Software Report: GEM-16

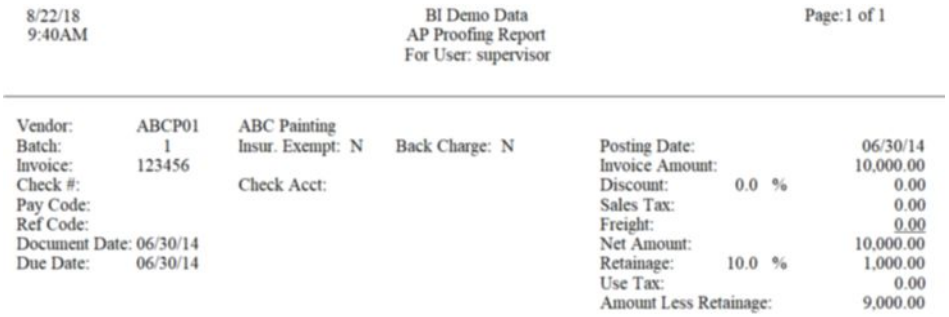
Created a utility to update older PO's (those created prior to v2017) to change the Vendor Status to FINAL on all CLOSED PO's



Modified the AP proofing report
Software Report: GEM-9

Modified the AP proofing report and the AP posting report to subtotal the invoice amount when retainage is applied.





8/22/18 9:40AM — BI Demo Data — AP Proofing Report — For User: supervisor — Page: 1 of 1

Vendor:	ABCP01	ABC Painting		Posting Date:		06/30/14
Batch:	1	Insur. Exempt: N	Back Charge: N	Invoice Amount:		10,000.00
Invoice:	123456			Discount:	0.0 %	0.00
Check #:		Check Acct:		Sales Tax:		0.00
Pay Code:				Freight:		0.00
Ref Code:				Net Amount:		10,000.00
Document Date:	06/30/14			Retainage:	10.0 %	1,000.00
Due Date:	06/30/14			Use Tax:		0.00
				Amount Less Retainage:		9,000.00

Bug Fixed - User Security Level for AP Entry
Software Report: GEM-20

A typical (minimal) security setting for an AP person (AP Entry-Transfer and AP-Entry-Post) was limiting that user's ability to see the cost code list. This has been corrected.

Bug Fixed - User Security Level for AR reporting
Software Report: GEM-11

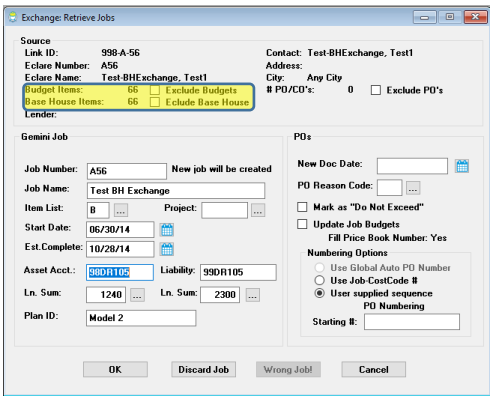
Two reports under AR (AR Invoice Payment History and AR Interest) were updated to restrict to only users with AR reporting.

Feb-2018
Release: Gemini 2018b
Version: 2018.01.1802.161

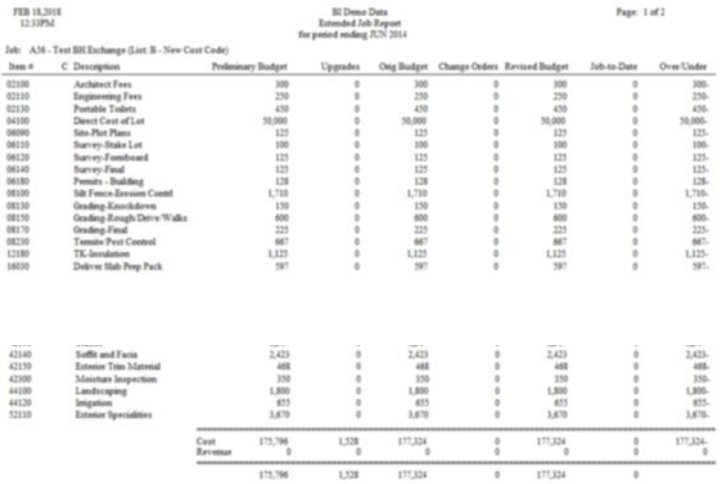
Exchange-Eclare to Gemini – Base House
Software Report: SR5081

When reviewing job reports in Gemini, it is helpful to see a column for Base House budget, a column for upgrades (option selections) and a column for the total budget at job start. The Extended Job Report provides these columns, plus the Change Order, Revised Budget and Job Cost-To-Date columns.

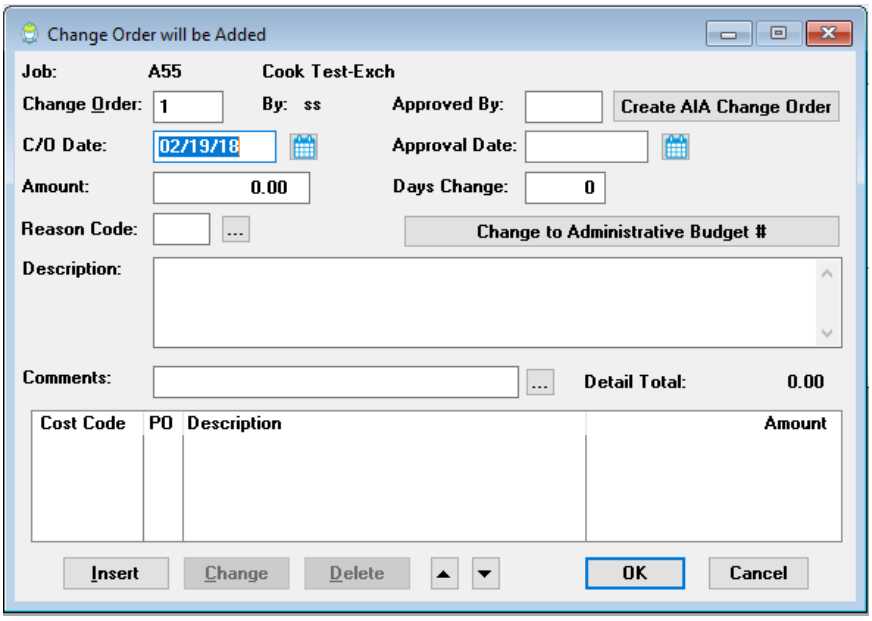
The Gemini Job Exchange screen has a new additional budget field
BASE HOUSE ITEMS



The Extended Job Report shows the BASE HOUSE, UPGRADES and ORIGINAL BUDGET



Insert Change Order-Date auto filled
Software Report: 5361
When creating a new change order – the C/O Date is a required field. This software change will auto-fill the date field using todays date.



Export Check Register details
Software Report: 5284-1
Changed the exported data to prevent rounding when the checkbox to force 2 decimals is not checked.

Job Header Address CSZ – Separate Fields
Software Report: 5254

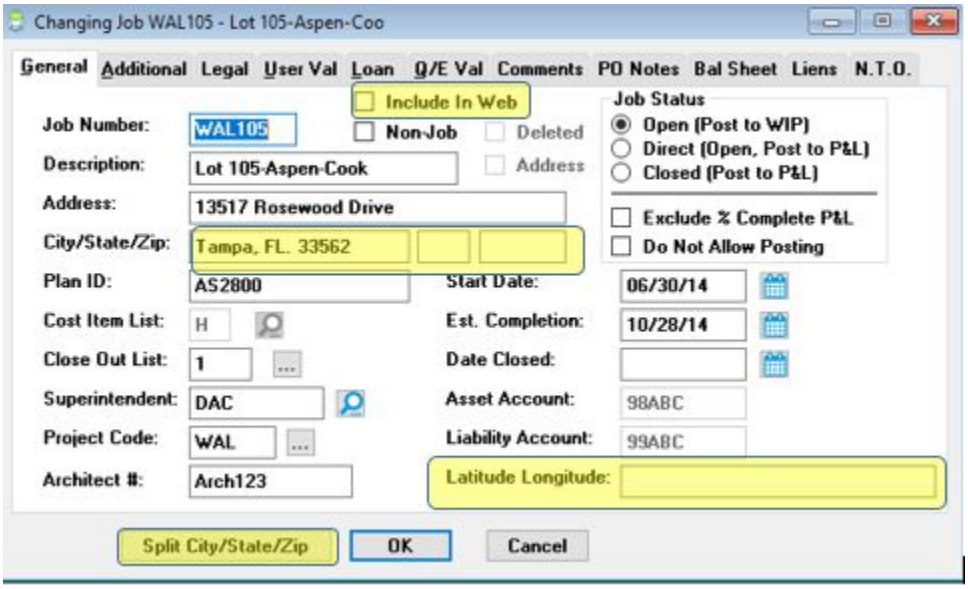
The Job Address field for City, State, Zip was previously a single field. The City, State, Zip fields are now individual fields. This change provides a properly formatted address to the BI WebPortal for purposes of navigation to the job site. Additionally, a button has been added to automatically parse and move the existing CSZ values into the new fields. The button does not appear after the CSZ data has been moved.

Job Header Address Latitude and Longitude
Software Report: 5255

Added Longitude and Latitude fields at the Job header. This provides the BI WebPortal the job navigation information when a job is set up in a new community prior to street addresses being assigned.

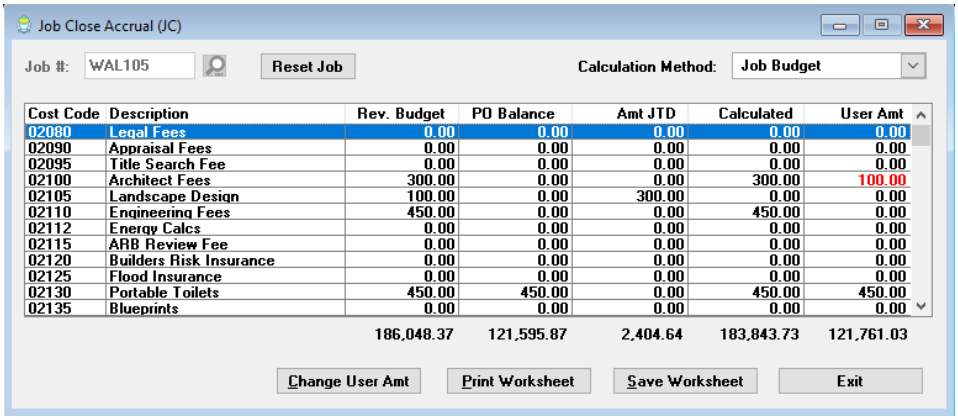
Job Header Include in BI WebPortal
Software Report: 5259

Added a check box to control if a job is published to the BI WebPortal. This one check box will control purchase orders and construction schedules. If the checkbox is set to NOT CHECKED – the job will not be displayed in the BI WebPortal.



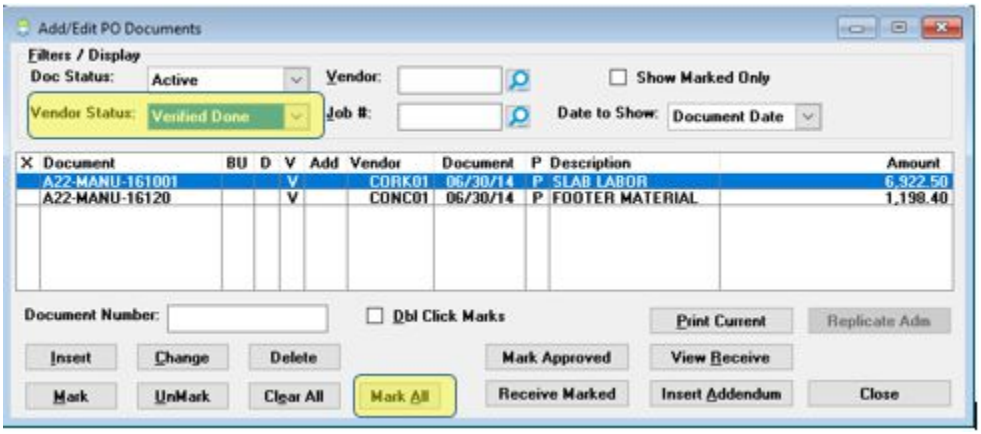
Job Accrual at Closing - JC Menu
Software Report: 5241

Added a JC Job Accrual calculation menu under the JC (Job Cost) main menu. The additional Job accrual does NOT have posting ability. This allows non-accounting personnel access to the Job Accrual process - an estimator can create and SAVE a job accrual, then an accounting person can open the SAVED job accrual under the GL menu and complete the posting.



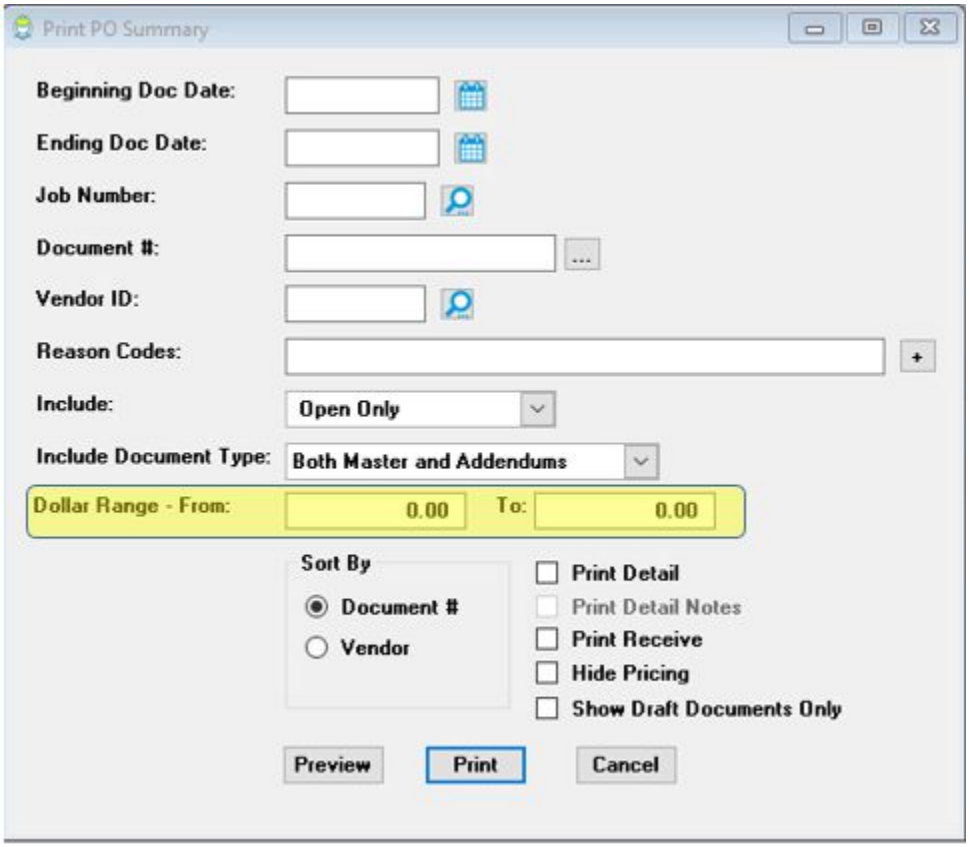
MARK ALL PO's for Web Portal
Software Report: 5252

The PO Add/Edit menu has a new MARK ALL button. This is designed to be utilized with the new BI WebPortal. When a superintendent marks a Purchase Order as Approved for Payment (in the BI WebPortal), the vendor status changes to VERIFIED DONE. When a Gemini user is ready to process purchase orders into AP, at the PO Add/Edit window the Purchase Order vendor status is filtered to show only VERIFIED DONE, and the MARK ALL button is used to select all the displayed PO's.



PO Document Summary Report – added Filter
Software Report: 5118

Added a dollar range filter to allow users to reduce the displayed variance purchase orders based on a dollar value. The dollar value is based on each specific addendum, not on the total value of a PO with multiple addendums.

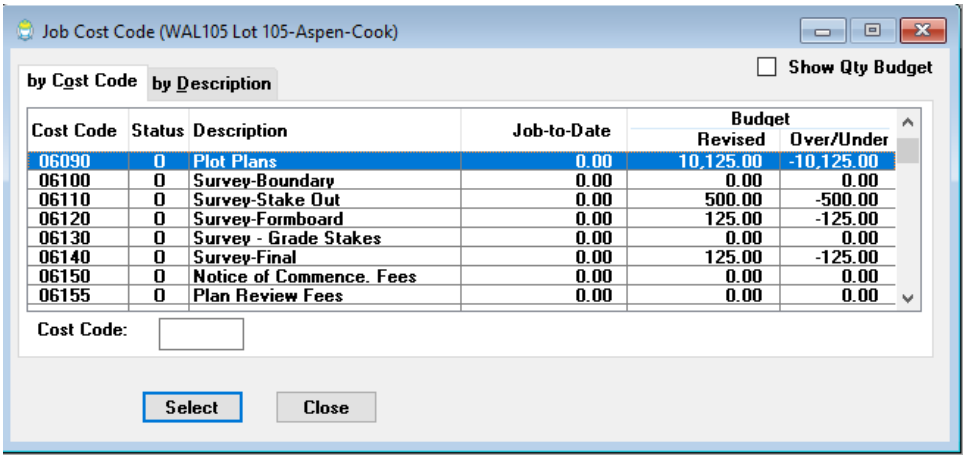


AP Report Show Vendor Name
Software Report: 5196

The AP proofing and posting report did not show the entire vendor name. Adjusted the report alignment to show the vendor's full name. In some cases, a vendor can have the same name - with a special character $ - at the end to indicate a specific vendor.

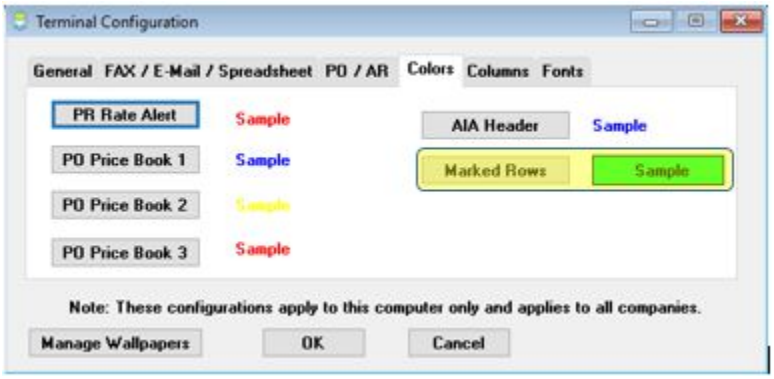
AP Add/Edit – Select Job Cost Code
Software Report: 5177

Changed the job information that is displayed when a user is entering an AP invoice and assigning to a job and cost code. The new window displays the job cost codes *and the budget assigned to each cost code*. This should assist users when picking a cost code to see all budgets and cost-to-date. By design, the user will NOT have access to change the budgets from this screen.

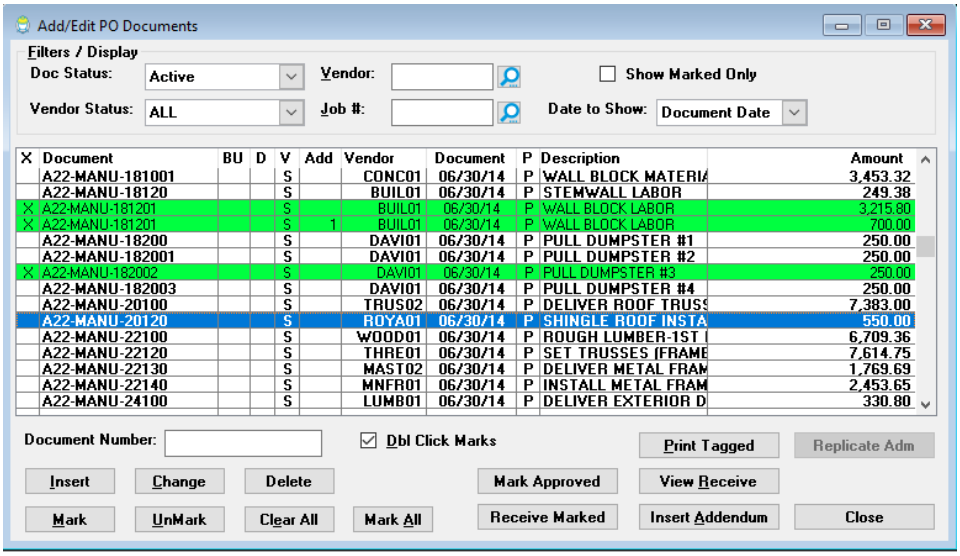


Marked Rows
Software Report: 5279

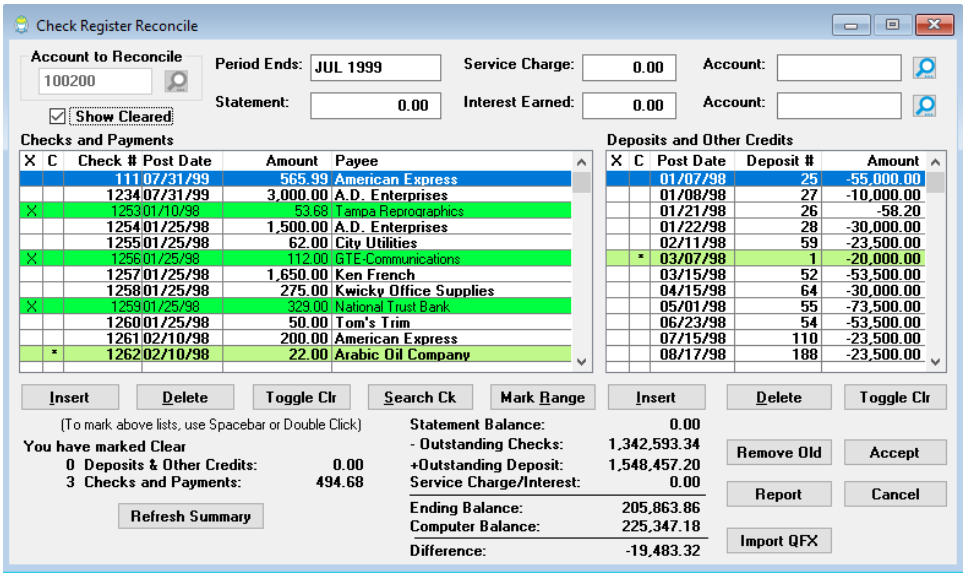
Added a user setting in the TERMINAL SETUP to allow users to color-code Marked Rows.



Software Report: 5279 - Add/Edit PO list – Colorized Marked Rows

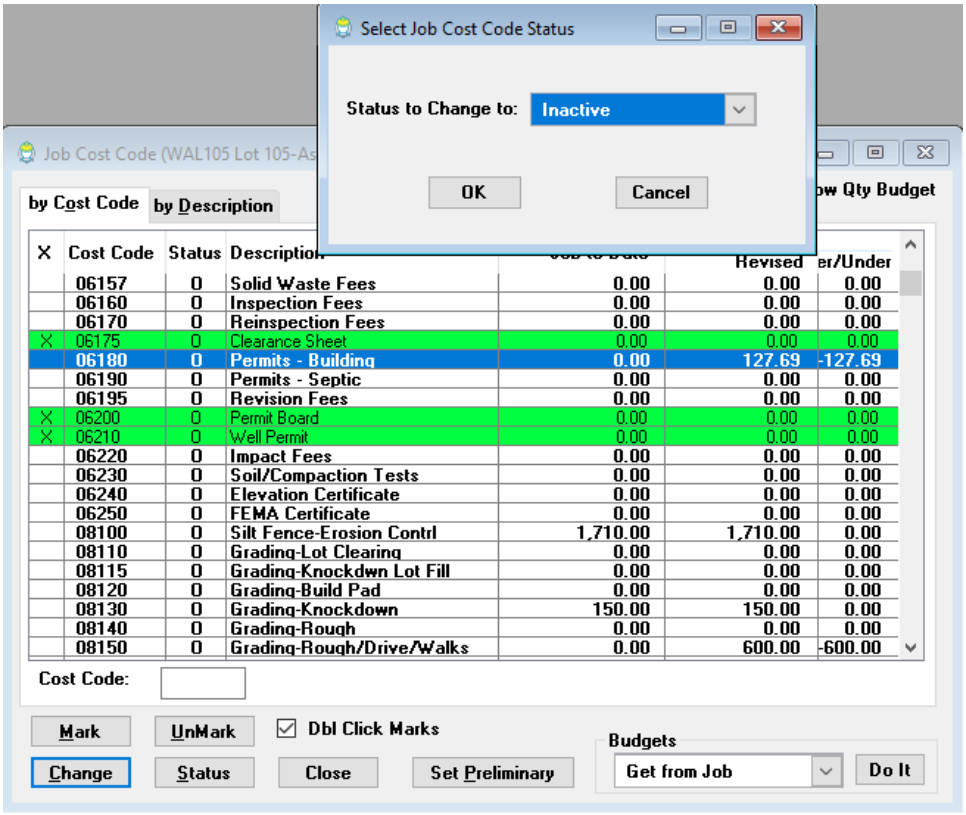


Software Report: 5279 - Check Register – Colorized Marked Rows



JC Cost Code Status – Global Mark
Software Report: 5293

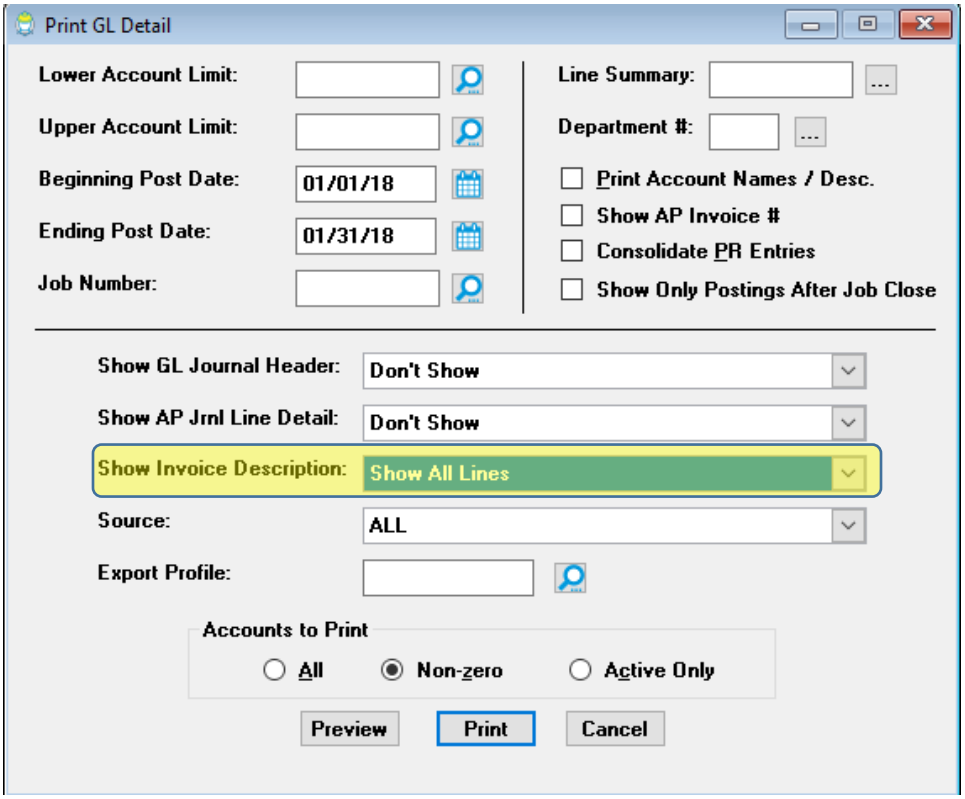
At the JC Budget window, added the ability to MARK multiple cost code lines and change the cost code status on all the selected cost codes.



X	Cost Code	Status	Description		Revised	er/Under
	06157	0	Solid Waste Fees	0.00	0.00	0.00
	06160	0	Inspection Fees	0.00	0.00	0.00
	06170	0	Reinspection Fees	0.00	0.00	0.00
X	06175	0	Clearance Sheet	0.00	0.00	0.00
	06180	0	Permits - Building	0.00	127.69	-127.69
	06190	0	Permits - Septic	0.00	0.00	0.00
	06195	0	Revision Fees	0.00	0.00	0.00
X	06200	0	Permit Board	0.00	0.00	0.00
X	06210	0	Well Permit	0.00	0.00	0.00
	06220	0	Impact Fees	0.00	0.00	0.00
	06230	0	Soil/Compaction Tests	0.00	0.00	0.00
	06240	0	Elevation Certificate	0.00	0.00	0.00
	06250	0	FEMA Certificate	0.00	0.00	0.00
	08100	0	Silt Fence-Erosion Contrl	1,710.00	1,710.00	0.00
	08110	0	Grading-Lot Clearing	0.00	0.00	0.00
	08115	0	Grading-Knockdwn Lot Fill	0.00	0.00	0.00
	08120	0	Grading-Build Pad	0.00	0.00	0.00
	08130	0	Grading-Knockdown	150.00	150.00	0.00
	08140	0	Grading-Rough	0.00	0.00	0.00
	08150	0	Grading-Rough/Drive/Walks	0.00	600.00	-600.00

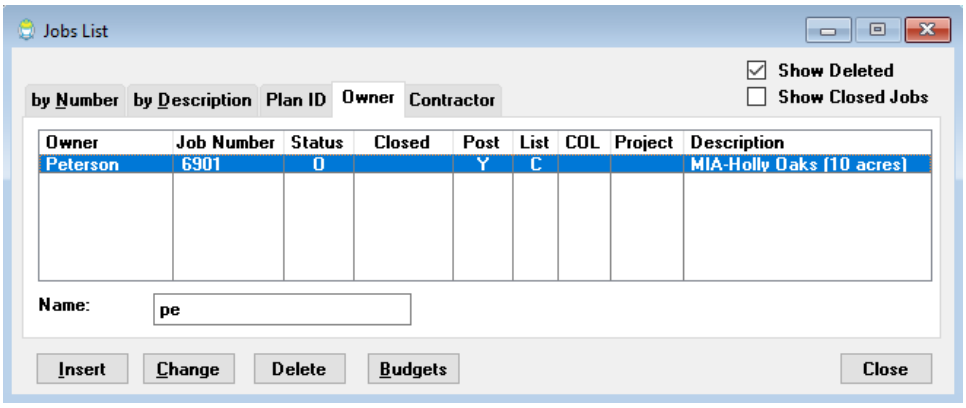
GL Detail Report Invoice Description
Software Report: 5231

Added new drop-down selection to include the invoice description in the General Ledger detail report.



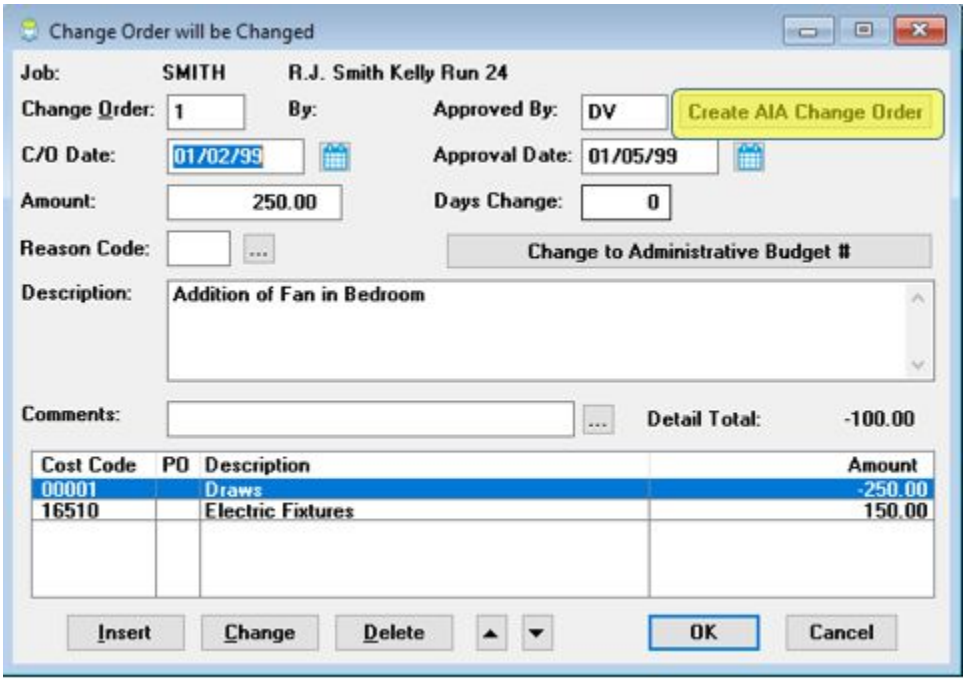
JC Maintenance Added Filters
Software Report: 5285

The Job Maintenance screen has TABS to display jobs by OWNER and CONTRACTOR. Added intelligent filtering to these tabbed lists.



Copy JC Change Order to AIA
Software Report: 5283

Added the ability to copy a JC Change Order and have the details automatically created in the AIA Job Change Order.

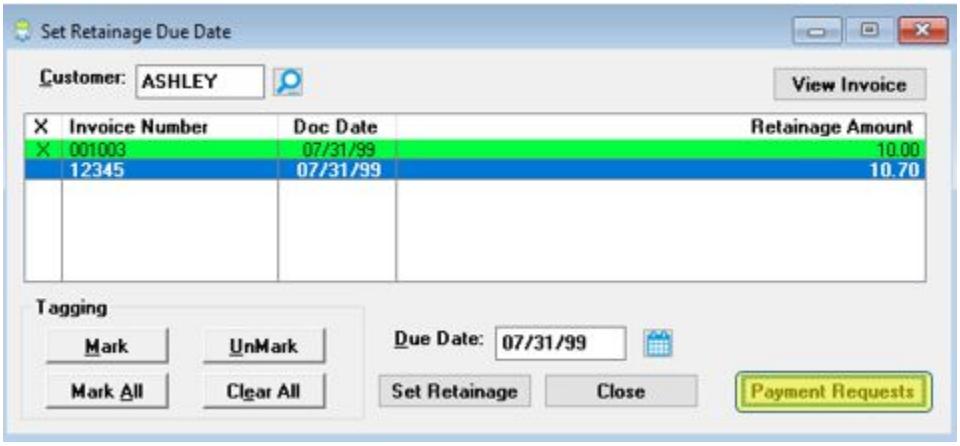


AIA Form Alignment
Software Report: 5268

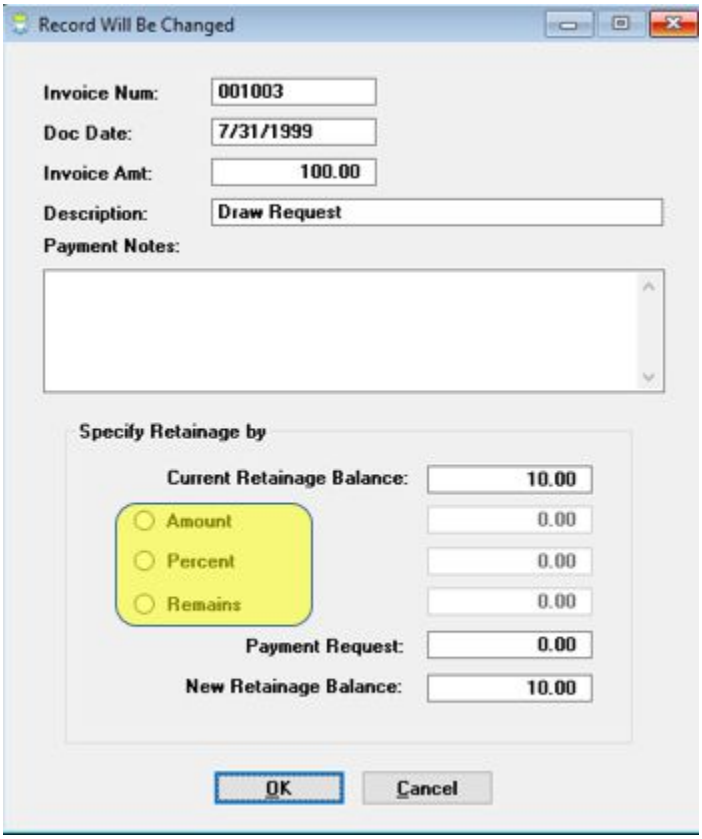
Made alignment changes to the G701, G702 and G703 to improve printing on the standardized AIA forms. Changes made in both the JC G701 menu, as well as the AIA G701, G702 and G703 menus.

Payment Request for AR Retainage Invoices
Software Report: 5318

Created a new Payment Request menu and related reporting. This can be used for AR Invoices that have previously been created and include retainage. The builder can send in a Retainage Payment Request without setting retainage as due. This is typical when retainage is reduced as the job progresses.

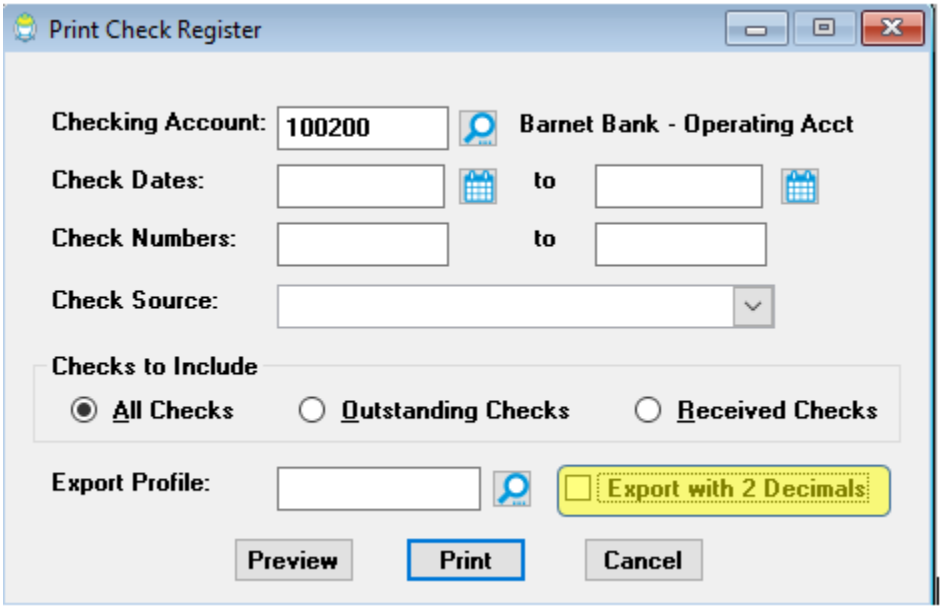


Retainage Request Amounts can be specified based on a fixed dollar amount, a percentage of the outstanding retainage or the amount of retainage to remain after the request is paid.



Positive Pay
Software Report: 5284

Made changes to the Positive Pay – exporting of AP Payment details for the purposes of uploading to your bank to avoid check fraud. (Positive Pay provides E-filing to banks after each AP check run to mitigate the potential of check fraud).



1099 / 1096 Forms-E Filing
Software Report: 5305

Made necessary changes to the 1099 / 1096 printing and E-filing to comply with the latest changes from the IRS and SS Admin.

W2 / W3 Forms-E Filing
Software Report: 5265

Made necessary changes to the W2 / W3 printing and E-filing to comply with the latest changes from the IRS and SS Admin.

Job Global Update
Software Report: 5250

Fixed Bug – Where the superintendent value was not copying to a selection of jobs. The ability to update or change a superintendent assignment to multiple jobs at once has been fixed.

Job List Report Export of Super Field
Software Report: 5271

Fixed Bug – Where the superintendent values were not exporting in the Job List – Export Profile Report.

TxMaintenance Scrolling
Software Report: 5286-2
Fixed bug related to the Text Editor scrolling and menu display.

Job List Maintenance
Software Report: 5286-2
Fixed bug related to the Job list showing Deleted and Closed Jobs when the OWNER or CONTRACTOR tabs are used, and the SHOW deleted or closed was not checked.

AIA Show Closed Jobs
Software Report: 5300
Fixed bug related to the Job list in the AIA always showing closed jobs. The user preference is remembered each time the AIA Job list is opened; however, the list was generating based on all jobs.

Multiple Monitor
Software Report: 5317

Changed how window positioning is stored for purposes of multiple monitors. In prior versions, when a user is displaying on multiple monitors certain windows would become "out of focus" and not displayed. The changes made will position each window with a relative frame and allow better control when moving the application window from monitor 1 to monitor 2.

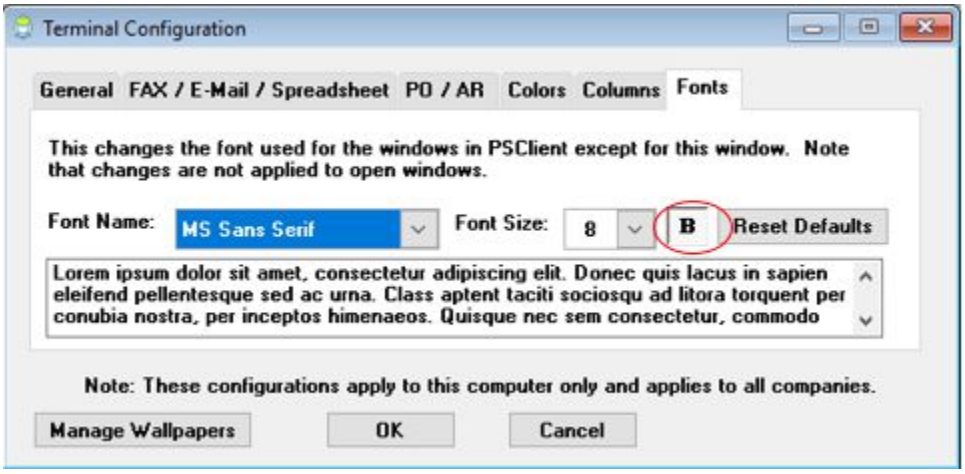
Adjust Font Added to Main Menus
Software Report: 5286

This was expanded from the changes we made in version 2017 to include all the MAIN MENUS. We also added a BOLD for each font style selection.

Individual users can now select the FONT STYLE and FONT SIZE to meet their individual needs.

Go to FILE | TERMINAL SETUP | Fonts tab

Select the FONT NAME (Style) and FONT SIZE from the drop-down lists.

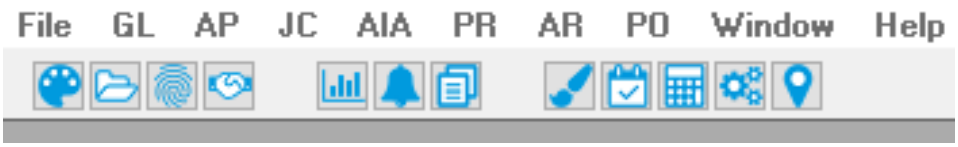


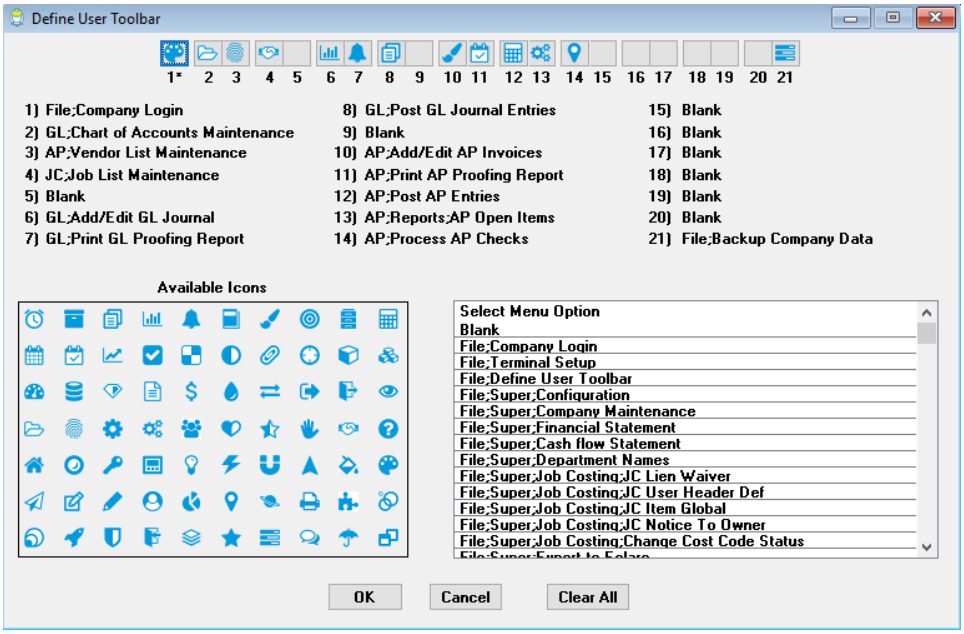
These settings are specific to a user's workstation (or a user's log in if working in Remote Apps or Remote Desktop). Therefore, each user can select a font style which best suits their needs.
Printed Reports remain in the standard font and will not reflect these changes.
By design, some windows (such as system messages) will not change.

The *"Lorem ipsum"* paragraph will display how each font selection will appear.

Replaced All Program Icons
Software Report: 5287

Users can assign menu short cuts with the DEFINE USER TOOLBAR. The Icons have been updated to reflect the higher resolution capacity for Windows 10 and future operating systems.





Job List Report.

Software Report: 5160 Show Superintendent when Include Job Header is checked ON
Fixed bug that was not showing the superintendent

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Job List Report
for Job "A22MANU" only, Open

Job No.	Job Description	Item List	Start Date	Status	Notes
A22MANU	Doe, Jane	H	06/30/14	Open	

Job Header Information

Job Number:	A22MANU	Project:		Lien:	Superintendent:	DAC	No Posting Allowed: N
Job Name:	Doe, Jane				Tax Rate:	7.00	Exclude Cost Complete N
Owner:	test, 2				WIP Expense	98ABC	Alt. Closeout List:
Address:	13517 Rosewood Drive				WIP Income:	99ABC	
	Any City,US 55555				Loan Institution:	B0FA01 - B of A Financing and Mortgage Inc.	