



REPORTS: Client Proposal Report Enhancement

Program(s): PSClient Software Report: 4870

Reports | Client Proposal

Added a new "Proposal for: CN, Lot #: NNNN" footer to each page of the Client Proposal report (where CN = Client Name and NNNN = Lot # if it has been assigned). The new footer Client Name and Lot # was added to help users keep individual, multi-page Client Proposal reports together when multiple proposals are output.

CLIENTS: Permit Number - PIN Number

Program(s): PSClient Software Report: 4878

Clients | Insert/Change | Departments | Construction

Clients | Transactions | Client Header | Departments | Construction

Reports | Client Detail Report

Reports | Client Profile Report | Export ID

Scheduling | Trade Contractor Projection Report

Scheduling | Reports | Construction Overview

1. Increased the size of the existing "Permit Number" field from 15 to 25 alpha-numeric characters.

2. Added a new 25 character alpha-numeric "Permit PIN" field immediately below the Permit Number field to assist interested parties in dealing with municipalities which require PINs for scheduling inspections, reviewing job status, and so on. The new Permit PIN displays on/is included in various reports, export/import options, and so on, as noted above.

CLIENTS: Delete TODO Transactions

Program(s): PSClient Software Report: 4882

File | User Maintenance | Insert/Change | Security

Clients | Transactions

Added a new "Allow User Override" Global security checkbox option. If checked, this powerful new option gives the user the capability specifically allocated to the supervisor in previous versions to edit or delete any user's Client Transactions.

1. Even though a user may be able to delete transactions, the ability to actually edit transactions may still be constrained by other security configuration settings.

2. During program upgrade, the default setting for this option will be unchecked (not allowed for any user) although the Supervisor will continue to have the edit/delete ability regardless of security settings.

MAINTENANCE: Display Base Price on Models Browser

Program(s): PSClient Software Report: 4888

Maintenance | Models

Added model home "Base Price" to browser list.

REPORTS: Add Company Logo to Warranty Request

Program(s): PSClient Software Report: 4901

File | Supervisor | Configuration | Misc Info 2

Reports | Warranty | Warranty Request

Added a new "Warranty Request Options" configuration box to the Misc Info 2 tab. It will allow users to either print a company logo (or other image) and/or to print the company header on the Warranty Request report (both vendor and homeowner copy).

1. If a logo is added and the configuration "Print Company Header" checkbox option is not checked, the logo will print at the top-center of the page and the company header will print beneath and to the left of it. If the checkbox is checked, the image will

print at the top left of the page and the company header will print to the right of it.

2. If using multiple image files for multiple companies, each company's image file must have a unique name and be physically located in the PSClient programs folder (not in the DATAnn company folder). Image files must be in the .JPG file format and the filename cannot exceed a total of 20 characters including the file extension type (for example, MY LOGO FILENAME.JPG).

ALL: Company Log-in Enhancement

Program(s): PSClient, Eclare, Gemini Software Report: 4906

File | Company Login

Added a new feature which allows users to quickly switch companies as long as their user name and password is the same in each company involved.

Once a user has successfully logged into a given company with their common user name and password, changing to another company only requires that they use the File | Company Login option to select it. The user name and password will automatically be filled in and all the user will need to do is accept the login information on the login window (they can either click on the OK button or press the ENTER key).

MAINTENANCE: Filter Master Option List Models by Subdivision

Program(s): PSClient Software Report: 4907

Maintenance | Master Option List | Models

Added a "Show Only Subdivision" pulldown option field at the top of the browser window to filter the Master Options List models by Subdivision. If a Subdivision is selected, then the Master Options List browser below the field will only display models that are assigned to that subdivision. The user can clear the field and Tab off to redisplay all models.

CLIENTS: Add Lot # to Client Transaction Header

Program(s): PSClient Software Report: 4908

Clients | Transactions

Added a "Lot #" field to the top-right of the Client Transaction browser window header. The Lot # will display if a Contract lot is defined. Otherwise, it will display a quoted lot # followed by "(Quoted)". If neither is defined, the Lot # field will be left blank.

FILE: Company Login Backup Warning

Program(s): PSClient, Eclare, Gemini Software Report: 4910

File | Supervisor | Configuration | Additional

Added a new warning message, "WARNING: This company has not been backed up yet!". It appears when a user logs into a company which has not been backed up within a specified number of days. The number of days, which is initially set to five (5) during the program upgrade, is specified in the Backup Warning Days field on the Additional tab.

1. The backup message only applies to backups made using your program's File | Backup Company Data option. We strongly urge you to make backups through the Prosoft program on a frequent basis even if you are using an alternate backup method.

2. The user 'Supervisor' can disable the backup message by setting the Backup Warning Days field to zero (0).

ALL: Launch Spreadsheet/App Other than Excel(R)*

Program(s): PSClient, Eclare, Gemini Software Report: 4914

File | Terminal | FAX/Email/Spreadsheet | Spreadsheet EXE

File | Launch Spreadsheet

Changed the 'Launch Excel' option provided in earlier versions of our programs to be "Launch Spreadsheet". Now, users may decide to use spreadsheets or other applications from other software vendors to open Comma Separated Value (.CSV) files created through our program's reports and/or other file export options.

* - Excel is a registered trademark of Microsoft Corporation in the United States and/or other countries.

MAINTENANCE: Master Model Maintenance Header and Model Browser Enhancements

Program(s): PSClient Software Report: 4918

Maintenance | Models | Insert/Change

Added a new "Base Date" field and an "Internal Notes" button to the master model maintenance window header. Also added a new "Base Date" column to the master models browser window.

The new "Base Date" field automatically updates using the user Log-in Date when a master model price is entered or changed. It can also be manually changed.

The new "Internal Notes" button opens a 2000 character text window in which user notes can be entered/edited as desired. When user-entered text exists, the "Internal Notes" button will appear in bold. If there is no user-entered text, the "Internal Notes" button will not be bolded (it may appear to be "grayed-out" but it is active).

REPORTS: Traffic Report Enhancement

Program(s): PSClient Software Report: 4928

Reports | Demographics | Traffic Report

Added "Realtor First" and "Realtor Repeat" columns to the Raw Traffic Report Summary by Month/Type for both individual and all sub-divisions.

"Realtor ..." is based on clients whose Status is set as "Internal".

FILE: Move Departed Employee's ToDo's

Program(s): PSClient Software Report: 4930

File | User Maintenance | Change

Added a "Transfer" button to the user Record will be Changed window. When selected, a new "Transfer User Assignments" window appears and allows selected groups of ToDo's for a given user to be transferred to a different user. The intent is to assist in moving a user's active ToDo's when they leave the company.

The progress bar for some ToDo transfer options may or may not go to 100%.

Group Todo checkbox options allow different types of ToDo's to be transferred to different users if desired. Some Todo options end with "Pending Only". It simply means that all those ToDo's except the ones marked as Done will be transferred. Items marked Done will retain the original user reference for historical purposes. Todo checkbox options are:

- Scheduled To Do Task
- Master Schedule List (To Do)
- Client Schedule Task (Pending)
- Client Detail To-Do's (Pending)
- Client Detail Warranty To-Do's (Pending)

ALL: Program Date Lock Enhancement

Program(s): PSClient, Eclare, Gemini Software Report: 4933

Eclare, Gemini, and PSClient: Program Run Initialization

Added new logic that will allow a user to connect to the Prosoft Server to update their program registration when they have exceeded their date lock (see NOTE A, below) and is retroactive to all programs version 2013.20 and higher. When a date lock actually occurs, a new window will appear which will give the user either three (PSClient and Eclare) or four (Gemini) options:

1. Enter Registration (Manually update Registration from a current Registration Sheet)

2. Connect to Prosoft Server (See NOTES A and B, below - Updates Registration using the Help | Check for Updaes function)
3. Gemini Program only: Continue in Restricted Mode (See NOTE C, below - Allows users to access information already posted. All posting functions are disabled)
4. Exit Program (Aborts program initialization/terminates the program)

NOTES

- A. Assumes Registration is current
- B. Requires an internet connection
- C. Registration is terminated/suspended

SCHEDULING: Faster Trade Contractor Projection Report Time

Program(s): PSClient Software Report: 4945

Scheduling | Trade Contractor Projection Report

Changed report processing coding to reduce the report compilation time.

MAINTENANCE and REPORTS: Master Option Short Description

Program(s): PSClient Software Report: 4954

Maintenance | Master Option List

Maintenance | Models | Insert/Change

Clients | Change | Model Options | Change

Reports | Client Proposal

Reports | Color Selection | Color Selection Report

Added a new "Use Short Description" checkbox option to several options maintenance and report setup locations. When checked, the program will search for a double colon "::" in a description field and, if found, will only show the Master Option Description up to but not including the special characters.

For example, if a Master Option Description was "Door - Exterior - Single 3/0:: Six Panel (no Window)" and the 'Use Short Description' checkbox was checked, the description would actually display/print as "Door - Exterior - Single 3/0".