



File: User Security Report Enhancement

Program(s): PSClient Software Report: 5018

File | User Maintenance | Report

Changed the report to show deleted users in a separate section titled "Users Marked Deleted" following active users.

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.

Maintenance: Copy Lots

Program(s): PSClient Software Report: 5060

Maintenance | Subdivision & Lots | Lot Inventory

Added an "Insert/Copy" button to the Lot Inventory browse list. To use, highlight the lot to be copied from and click on the Insert/

Before a new Lot Inventory record can actually be created from the existing highlighted record, PSClient will require information in the Lot # and Address fields to be changed. Also, if populated, the Job Number field must either be changed or blanked. Once required field data is updated, all the other fields in the highlighted record will simply be duplicated after clicking on OK to create the new Lot Inventory record.

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.

Maintenance and Scheduling: Add Subdivision & Gate Code Fields

Program(s): PSClient Software Report: 5070

Maintenance | Subdivisions & Lots | Insert/Change

Maintenance | Administrator | Tx Document Maintenance

Scheduling | Daily ToDo's Report

Scheduling | Trade Contractor Projection Report

Added two new fields to the Subdivisions and Lots window, "SID" (Subdivision ID) and "Entry Code":

- The "SID" is a maximum three character field used on the Trade Contractor Projection Report to indicate at which subdivision each subcontractor task is located. Only three character are used due to space limitations on the contractor report.

- The "Entry Code" is more commonly known as a 'gate code'. When entered, it prints out on the Daily ToDo's Report and the Trade Contractor Projection Report (commonly called the 'Subcontractor Calendar' Report) and provides the gate code to vendors needing access to the subdivision.

- "SID" and "Entry Code" are also available as tokens labeled "SubDivID" and "EntryCode", respectively, in the Tx Document Maintenance module. They are located on the new Insert | Insert Tokens | CONT (Contract) tab.

Clients: Paycode Select Window Enhancement

Program(s): PSClient Software Report: 5080

Clients | Insert/Change | Schedule | Insert/Change | Pay Code

Scheduling | Maintenance | Master Schedules | Schedule | Insert/Change | Pay Code

Added Pay Code and Description tabs to the AP Paycode List browser window (accessed through the Pay Code field) as well as a search field for both tabs.

Reports: Options Reference Report Export Option

Program(s): PSClient Software Report: 5083

Reports | Sales Analysis | Options Reference Report

Added a new "Export File" field to the Options Reference Report setup window. The export format is pre-defined and cannot be changed by the user - the user can only control file location and name. Usage requires the optional Spreadsheet Interface

Export fields are Client ID, Last Name, First Name, Retail Sold, Model, Subdivision, Lot #, Lot Address (actual address from the Client header), Contract Date (Signed Date), and Close Date (Final Closing date).

Scheduling: Vendor Loading Report

Program(s): PSClient Software Report: 5100

Scheduling | Reports | Vendor Loading Report

Added a new report that shows, by day, to which jobs or tasks a vendor is assigned. Up to a maximum of 9 periods can be output for one or more trades.

Clients: Assign Lot Price

Program(s): PSClient Software Report: 5101

Clients | Insert / Change / Transactions | Client Header | Contract | Save Contract

Clients | Insert / Change / Transactions | Client Header | Contract | Print Contract

Changed the Save Contract option to automatically save any changes to the Client Header prior to and after the Save Contract option is selected. The change insures information changed by the user will be saved and clicking on the Cancel button back on the Client header edit window will not undo/delete those changes.

- Changed "Save Contract" & "Addendum" records to include Lot information. Please note that the ability to updated lot information such as Lot Number and Address depends on new information being saved through the "Save Contract" option.

- Assumes the Lot is the one currently selected (Assigned or Quoted) until a saved Original Contract or Addendum with lot information is found. Since Lot Information was not available in prior versions of the program, it may not be correct. The program starts by assuming the current lot is what has been used all along until a LOTID\$ is found.

- If the Lot is changed, even if the price is the same, the program will now automatically detect and create an addendum. Also, the "Before" and "After" Addendum contracts now work correctly in all modes including Original and Pending.

- The prompt window will now show the currently selected lot (number and address) in the model option section (only "Lot" was shown in prior versions).

Updated Print Contract to properly handle changes in lots and to use new lot information that is now available.

- When a lot is changed, it now shows as two lines, one for the old, negative dollar amount and another for the new lot with a positive amount. The net difference will equal the change in cost.

Added new export tokens to deal with the above changes. They are located on the new Insert | Insert Tokens | CONT (Con

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.

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.

* © 2015 Google Inc. All rights reserved. Google and Google Drive are trademarks of Google Inc.

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).