

Gemini 2020



Sep-2020 Release: Gemini 2020c Version: 2020.01.2007.271

Vendor Maintenance – Related to Web Portal

Software Report: GEM-numerous

Numerous internal code changes made to improve integration to the WebPortal

<u>Vendor Insurance Audit Report – Added ability to select multiple CATEGORIES</u> Software Report: GEM-114

We added a + button to allow a user to run the Insurance Audit report while selecting multiple categories. Previously the report could only be filtered one category at a time.

Print Insurance Audit R	eport	- • ×
Posting Date from:	I	
Posting Date to:		
Vendor Category:		+
Vendor Filter:		
Export Name:		
	Preview Print Cancel	

😂 Print Insurance Audit F	eport	
Posting Date from:		
Posting Date to:		
Vendor Category:	ISM	+
Vendor Filter:		
Export Name:		
	Preview Print Cancel]



Job Detail Report – Expanded ability to select COST CODES

Software Report: GEM-112

The Job Detail report can now filter by Cost Code. The user is provided a MARK – Select method to enable the ability to select many cost codes. Note that these can be selected from multiple Cost Code Lists.

🐡 Print Job Detail Report	
Lower Job Limit: Upper Job Limit: Beginning Post Date: Ending Post Date: Wendor #: AR Cost Plus Cycle:	Include Source GL AP PR AR Job Status to Include Open Closed Inactive Pay Code: Exclude Code Ref Code: Exclude Code AR Class: Exclude Class GL Group: Exclude Group
Categories:	•
Print Cost Code Notes Show AP Paymen Print Job Comments Print AP Dist. Not Print Overruns Only Consolidate PR E Print GL Dist. Notes Show CCode if But	es Print AR Dist. Notes ntries Print AlA Summary
Export Profile:	Additional User Filters Cancel

	Select Cost Codes	- 0 -
	A - House List S by Number by Description	how Deleted
🤤 Print Job De	X Cost Code Description 215 Knockdown Foundation Fill X 220 Plumbing Rough	^
Lower Job L	225 Soil Density Test X 230 Termite Treatment	
Upper Job L	X I235 Deliver Slab Package X I238 Helical Piers X I240 Deliver Slab Concrete	
Beginning P	243 Footing Inspection	
Ending Post	Cost Code:	
Vendor #:		
AR Cost Plu	Mark UnMark Clear All	Done
Categories:	•	
Cost Codes:		
Print Cost	Code Notes 🗌 Show AP Payment Details 🗌 Show AR Payment Details	
🗌 Print Job C	omments 🗌 Print AP Dist. Notes 🗌 Print AR Dist. Notes	
Print Overr		
Print GL Di	ist. Notes 🛛 Show CCode if Budgeted 🗌 Show Only Posting After Close	
Export Profile:	Additional User Filters	
	Preview Print Cancel	



Mar-2020 Release: Gemini 2020a Version: 2020.01.2003.201

Vendor Maintenance – Include in Web Portal

Software Report: GEM-19

Added a column to indicate IF a vendor is included in the WebPortal. "Y" or Yes indicates the vendor's ADMIN-USER and any other Vendor-Users that were set up by the Vendor-Admin will have access to the WebPortal.

A "Y*" indicate the Vendor-Admin user was previously setup, however their access has been restricted. If restricted the Vendor Admin and any other Vendor-Users set up by the Vendor-Admin will NOT have access to the Web Portal.

👶 Vendor Lis	;t		
			Show Deleted
¥endor #	<u>N</u> ame	<u></u> D /B/.	A Show Lenders Only
Vendor #	S	Web	Name
123FRA	A	Y⁼	123 Framing
123NEW	A	Y	New Vendor
123P01	A	Y	123 Paint
123SOL	A	Y	123 Solar Solutions
AASMH	A	Y	Aarons Smith Works
ABCP01	A	Y	ABC Painting
ABLE01	A	Y	Able Architect Group
APPL01	A	Y	Apple Appliances
AVER01	A	Y	Averett Water & Sewer
B0FA01	A	Y	B of A Financing and Mortgage Inc.
BRICK1	A	Y	Bob's Brick BarnABCD
Vendor #:			
			View
<u>I</u> nsert	<u>C</u> han	ige	Delete Contacts Open Items Payments Close



Vendor Maintenance – Include in Web Portal-Restrict from Portal

Software Report: GEM-19a

Added controls to allow access to the WebPortal. The setting indicated below would NOT allow access for the vendor Greg's Gas Works. Additionally, the AP Vendor Maintenance screen would show a "Blank" in the Web column (see 2nd screenshot below).

😌 Vendor v	vill be Chang	ed (Greg's (Gas Works	;)					,
<u>G</u> eneral	Additional	Contacts	Checks	Defaults	M <u>is</u> c	User Defined	<u>M</u> emo	Web Access	Actions
	This inl	formation is	s used for	r the vend	or to ac	cess the Gemin	ni Web :	Server	
) User Name	: [
	Password: Connection			(Case se	ensitive)				
Last	Connection	-							
-	This in	formation i	s used fo	r the vend	lor acce	ess to the Web	Portal:		
	nclude in P	ortal							
	OK	Cancel		<u>V</u> ier	w Open	ltems Vie	ew <u>P</u> ayn	nents	

😂 Vendor Lis	t			×
⊻endor #	<u>N</u> ame	<u>D</u> /B//	A Show Lenders C	Inly
Vendor #	S	Web	Name	~
FLOR03		Y	Florida County Building Permits	
FLOR05	A	Y	Florida County Building Dept.	
GEOR01	A		Georgia County Permits	
GEOR03	A		Georgia County Building Department	
GLOB01	A		Global Environmental Services	_
GRAN01	A		Granite Guys	_
GRAV01	A		Graves Underground	_
GREA01	A		Great Garage Doors Co.	_
GRGGAS	A		Greg's Gas Works	V
Vendor #:				
<u>I</u> nsert	<u>C</u> han	ge	View Close Delete Contacts Open Items Payments Close	



<u>Vendor Maintenance – Include in Web Portal-Restrict from Portal (Continued)</u> Software Report: GEM-19a

The setting indicated below WOULD allow access for the vendor 123 Paint.

🔅 Vendor v	vill be Chang	ed (123 Pai	nt)						, • 💌
<u>G</u> eneral	Additional	Contacts	<u>C</u> hecks	<u>D</u> efaults	M <u>is</u> c	User Defined	<u>M</u> emo	Web Access	Actions
	This in	formation i	s used fo	r the vend	or to ac	cess the Gemin	ni Web	Server	
) User Name) Password:	: <mark>123pair</mark> 123pair		(Case se	ensitive)				
Lasi	Connectior			IOAM					
	This in	formation i	s used fo	r the vend	lor acce	ess to the Web	Portal:		
	Include In P	ortal	User N	ame: J	im@123	3P01.com			
	Restrict Fro	n Portal	Passw	ord: 🛛 🗌	x\$5VT@	<u>AN</u> Gen	ierate P	assword	
	OK	Cancel		Vie	w Open	ltems Vie	ew <u>P</u> ayr	nents	

The setting indicated below WOULD RESTRICT vendor 123 Framing – however it would NOT remove any user credentials previously setup. This is a method to temporarily restrict a Vendor-Admin User and all other Vendor-Users without deleting the User Name and Password that were previously setup.

٢	Vendor v	vill be Chang	ed (123 Fra	ming)						, • 💌
	<u>G</u> eneral	Additional	Contacts	<u>C</u> hecks	<u>D</u> efaults	M <u>i</u> sc	User Defined	<u>M</u> emo	Web Access	Actions
		This in	formation is	s used for	the vend	or to ac	cess the Gemi	ni₩eb	Server	
	Wet) User Name) Password: Connection			(Case se	nsitive)				
		This in	formation i	s used fo	r the vend	lor acce	ess to the Web	Portal:		
		nclude In P	ortal	User N	ame: J	ohn@1	23frame.com			
		Restrict Fror	n Portal	Passw	ord: 🕻	BPCE!s	l \$ Ger	erate P	assword	
		OK	Cancel		⊻ie	# Open	Items Vie	ew <u>P</u> ayr	nents	



Vendor Maintenance – Vendor User Name and Password

Software Report: GEM-99-b

Added fields for the Vendor-Admin User Name and Password. The User Name is the Admin vendors email. The Password is auto generated. Clicking on the Generate Password will also automatically sync with the WebPortal and update the password immediately after selecting OK.

User Name – Must be the Email for the Vendor Admin. The Vendor-Admin is the user at the vendors office that will have authority to setup other Vendor-Users and grant those Vendor-Users access to certain reporting within the WebPortal.

Password – Must follow complexity requirements (the password is created automatically and cannot be changed manually).

Note: Any other Vendor-Users setup by the Vendor-Admin also have a controlled password complexity requirement.

😌 Vendor v	will be Chang	ed (123 Fra	ming)						
<u>G</u> eneral	Additional	Contacts	<u>C</u> hecks	<u>D</u> efaults	M <u>is</u> c	User Define	d <u>M</u> emo	Web Access	Actions
	This in	formation is	s used for	the vend	or to ac	cess the Ge	nini Web	Server	
) User Name Password:	с <u> </u>		(Case se	nsitive)				
Last	Connection	I]	(0411 11					
	This in	formation i	s used for	the vend	or acce	ss to the We	b Portal:		
⊡ I	Include In P	ortal	User Na	ame: J	ohn@12	23frame.com			
- F	Restrict Fror	n Portal	Passwo	ord: 🔅	PCE!sN	I \$ G	enerate P	assword	
	OK	Cancel		⊻iev	v Open	Items	/iew <u>P</u> ayı	ments	



Initial Sync Vendors to Web Portal

Software Report: GEM-99-c

Any new vendors that are added and/or any changes to existing vendors will automatically and immediately be updated to the WebPortal once the user selects OK.

🔅 Vendor v	vill be Chang	ed (New Ve	ndor)						
<u>G</u> eneral	Additional	Contacts	<u>C</u> hecks	<u>D</u> efaults	M <u>is</u> c	User Defined	<u>M</u> emo	Web Access	Actions
Vendo	or Number:	123NE\	1			Deleteo		Send PSClient Send Eclare	
Vendo	or Name:	New Ver	ndor]		
DBA N	lame:] 🗆 ι	lse for 1099	
Street	Address:								
2nd A	ddress Line:								
City:									
State:			Z	ip Code:					
Conta	ct:								
	ОК	Cancel		View	w Open	ltems Vi	ew <u>P</u> ayı	ments	

File | Super – Web Portal Configuration

Software Report: GEM-99-d

Created a new tab in File | Supervisor | Configuration to allow the setup for WebPortal configuration.

P <u>0</u> F		al PO https://	uto Look Group C astor-hon d Users T	odes nes.co	A <u>B</u>	A <u>B</u> F		AP Adt Proposal	JC PR Web Access Test
_	oot URL:	https://	astor-hon	nes.co	m				
Portal R	L					U	oload V	/endors	Test
	E	🗹 Sen	d Users T	o Port	al	Up	oload V	/endors	
)K	Can		CI	Percen			



Gemini-Web Portal Configuration removed if Company Copied

Software Report: GEM-98

When a Gemini Company is duplicated to create another company – which can be done from time to time for a variety of reasons, we automatically removed the Web Portal configuration details in the resulting new company. This insures no more than 1 Master Gemini company is linked to a builder's Web Portal.

Note: It is possible to have a single PSClient company and multiple Eclare and/or Gemini companies work in conjunction with the Web Portal. However, that setup requires a MASTER Gemini company to be selected to control User and Vendor details.

Added Tokens to Tx Editor for Web Portal notifications.

Software Report: GEM-104

When adding existing or new vendors to the Web Portal Builder's can easily create a mass email and send to all vendors. With the new tokens – this email can also include the Vendor-Admins User Name and Password.

ALL.	FLAG	OTHR	VEN	LIEN	JOB	NTO	CUST		
Vend	lor Belati	ed Toker	21						
Tok			Sou	D					
					escripti				
Ven	<u>an</u> Name		Ven Ven		endor N endor N			 	
	DBANam	~	Ven			anne BA Narr			
	Contact	e	Ven		endor C		le		
	Street		Ven		endor C			 	
	Street2		Ven		endor S				
Ven			Ven		endor C				
	State		Ven		endor S				
Ven	ZipCode		Ven	Ve	endor Z	ip Code			
Ven	CSZ		Ven	Ve	ndor C	ity,State	e Zi		
Ven	EMail		Ven	Ve	endor E	Mail			
Ven	Phone		Ven	Ve	endor P	hone			
Ven	FAX		Ven		endor Fa				
	WCE xp		Ven			/orker C			
	InsurExp		Ven			surance	е Ехр		
	License		Ven		cense N				
	LicenseE		Ven			icense l			
	User1En		Ven			iability			
	User1Da		Ven			<u>iability</u>		 	
	User2En		Ven			Comp E		 	
	User2Da User3En		Ven Ven			<u>Comp D</u> le Cove			
	User3En User3Da		Ven			le Cove le Cove		 	
	dorConta		Ven			ontacts			
	dorWebN		Ven			/eb Nan			
V			Yen						
Ven	dorPortal	Name	Ven		endor P	ortal Na	me	 	
	dorPortal		Ven			ortal Pa			



User Maintenance

Software Report: GEM-80

Gemini User Maintenance will be utilized to manage Builder Employees in the WebPortal.

User Name	Active	Restricted	Password	Unposted	1
Adam	N	Y	Y		
BobR	N	Y	Y		
Darrel	N	N	Y		
Dave	N	Y	Y		
John	N	N	Y		
office	N	Y	Y		
Prosoft	N	N	Y		
prosoft2	N	N	Y		
Prosoft3	N	N	Y		
Rob	N	N	Y		
Sales	N	N	Y		
Supervisor	Y	N	Y		
Suzan	N	N	Y		
user	N	N	Y		
					1

Add these WebPortal users with the fields shown below. The user's email will become their log in name for the WebPortal. You can also RESTRICT USER ACCESS as required.

👶 User Will	Be Chang	ed		×
<u>G</u> eneral	<u>S</u> ecurity	Inherit		
User Na	ame:	Adam		
Passwo	rd: [******		
Initials:		AS		
Name f	or Fax:			
E-Mail /	Address:	adam@astor-homes.com		
Superin	tendent:	ADAM [for PO Draft)	
		Allow Prior Period Entries		
		<u>R</u> estrict User Access		
		Allow User Time Card Entry		
		OK Cancel		



AR Billing Report – expanded \$\$ field

Software Report: GEM-80

Adjusted the field format to allow a value of \$ 999,999,999.99

Bug Fix – Corrected Spelling

Software Report: GEM-87

Corrected misspelling in Lien Waivers

😌 Terminal Configuration	
General FAX / E-Mail / Spreadsheet PO / AR Colors Columns Fonts	
On Program Exit: Prompt for Backup - Default to Yes 🔍	
Default Reports to Preview	
Numeric keypad "+" acts like Tab Key	
Prompt for Printer in AP Checkwriter	
Prompt for Printer in PR Checkwriter	
Use Doc Date for AP Waivers	
Override Preview Scroll Method	
Note: These configurations apply to this computer only and applies to all	companies.
Manage Wallpapers OK Cancel	

Speed Enhancement

Software Report: GEM-89 / BIWS ##

This enhancement relates to both Gemini and the Web Portal and the BI Web Services module. The code changes were designed to speed up the time required for a vendor to see all their Purchase Orders via the Web Portal. Loading time went from 3.5 seconds to 0.15 seconds.



Bug Fix - PO Insert leaves empty record

Software Report: GEM-32

Determined the root cause of an orphan PO when a user has a PO Edit window open and is kicked out of the system (due to internet or network connection issues) or incorrectly exits this window. This bug fix will prevent the creation of an orphaned PO.

There are normally 6 ways a window can be closed – all methods will work properly:

- 1. Hit Esc.
- 2. Click on the red X button on the caption bar
- 3. Click the Cancel button
- 4. Click the OK button
- 5. Click the system menu (left top of the window) and select "Close"
- 6. Hit Ctrl-F4

Bug Fix – User INI file overriding cloudserver ini

Software Report: GEM-84

The individual User ini file was incorrectly overriding the cloudserver ini for the MAILPS Path. This was corrected.

Printing Speed

Software Report: GEM-78

This applies to all GEM-PSC-ECL. Made some code changes to improve printing speed in conjunction with TSPrint.

The Software Reports listed below were also part of an <u>early release of version 2020</u>. Some builder businesses may already have these features installed prior to this release.



Add Project Manager to Gemini JC Header

Software Report: GEM-76

A new field has been added to the Gemini job header to assign the Project Manager. This will allow PM's to view jobs assigned to them from the BI WebPortal.

👶 Changing Job ASG	100 - ASG100-Smith-Alaf				
General Additional	l Legal <u>U</u> ser Val <u>L</u> oan	Q/E Val Comments P	O Notes Bal Sheet Liens N.T.O.		
	Inc	lude in Web	Job Status		
Job Number:	ASG100 🗌 No	n-Job Deleted	Open (Post to WIP)		
Description:	ASG100-Smith-Alafia		 Direct (Open, Post to P&L) Closed (Post to P&L) 		
Address:	1547 Northgate		Exclude % Complete P&L		
City/State/Zip:	Baltimore	MD 21201	Do Not Allow Posting		
Plan ID:		Start Date:	09/20/18		
Cost Item List:	С 🔎	Est. Completion:	01/20/19		
Close Out List:	1	Date Closed:	06/30/19		
Superintendent:	ADAM 🔎	Asset Account:	98ASG100		
Project Code:	ASG	Liability Account:	99ASG100		
Architect #:		Latitude Longitude:			
Subdivision:	Astor Gardens	Elevation:			
Model:	Alafia - ASG	Project Manager:	JS 🔎		
	OK	Cancel			



Global Assignment of Project Manager to Gemini JC Header

Software Report: GEM-76-a

Added the ability to assign or reassign a PM to jobs globally.

Global Update Jobs		
On this window, check the fields that you want to update	e and enter the new v User Definitions	alues into the fields.
Close-out List:		
Tax Rate:		
PR State:		
Project:		
Lien:		
Superintendent:		
🗌 Project Manager: 📃 🔎		
Use Description As Address: Use Description As Address		
Include In Web: Include In Web		
PO Notes:		
^		
	Close-T	
v		Next Cancel

Modify the PO Document Summary Report

Software Report: GEM-74

The PO Document Summary report has been modified to allow printing the details based on RECEIPT DATE of the invoice. This is now designed as a supporting report for auto-pay check runs.

😒 Print PO Summary	
Beginning Rcv Date: Ending Rcv Date:	Date to Use Document Date Received Date
Job Number:	
Document #:	
Vendor ID:	
Reason Codes:	+
Include:	Open Only 🗸
Include Document Type:	Both Master and Addendums
Dollar Range - From:	0.00 To: 0.00
	Sort By Print Detail Document # Print Detail Notes Yendor Print Receive Hide Pricing Show Draft Documents Only Preview Print



PO Early Payment Discounts

Software Report: GEM-73

Added a check box at the CONFIGURATION window – PO Additional Tab. This will allow users to configure early payment discounts to apply the discount before or after sales tax.

😌 Configura	tion								• ×
<u>C</u> ompany I	nfo	Additional	A <u>u</u> to Lookup	Alignment	GL	<u>A</u> P	AP Adtl	īc	<u>P</u> R
P <u>0</u>	PO	Add <u>it</u> ional	PO Group	Codes	AB	AB	Forms	Prop	osal
Auto Nu	ım Mı	ode: Us	e Job-CostCode	for Number		~]		
Next PO) #:								
Default	Payo	ode: NO/	A (for m	anually entere	d PO's)				
		F	O Early Payme	nt Discount					
These op	otions	control th	e printed PO/Co	ontract title	name, p	osition,	and font j	point siz	e
PO Title	:	Pure	chase Order						
Contrac	t Titl	e: Sub	Contractor Agr	eement					
			Location (in 1	/1000 inch inc	rements)				-
Title X I	Positi	ion: 187	5 Title Y P	osition: 68	80	Title Po	int Size:	16 🛔	•
		OK	Cancel	GL	Percent	t Comple	ete		

Added Job Address to JC Lookup

Software Report: GEM-70

<u>N</u> umber b	y <u>D</u> escrip	tion Plan ID	Owne	r C	ontrac	tor M	odel Su	bdivision Superintender t Address		Deleted Closed Job
lob Number	Status	Closed	Post	List	COL	Web	Project	Description	Model	Subdiv /
ASG100	0	06/30/19	Y	С	1	Y	ASG	ASG100-Smith-Alafia	Alafia - ASG	Astor I
ASG101	0		Y	С	1	Y	ASG	ASG101-Foster-Alafia	Alafia - ASG	Astor I
ASG102	0		Y	С	1		ASG	ASG102-Morgan-Kirkmann	Kirkmann - ASG	Astor I
ASG103	0		Y	С	1		ASG	ASG103-Rivera-Dresdin	Dresdin - ASG	Astor I
ASG104	0		Y	С	1		ASG	ASG104-Roberts-Georgian	Georgian - ASG	Astor I
ASG105	0		Y	С	1		ASG	ASG105-Campbell-Anderson	Anderson - ASG	Astor I
ddress:								1	1	1