

Gemini 2020

Sep-2020

Release: Gemini 2020c

Version: 2020.01.2007.271

Vendor Maintenance – Related to Web Portal

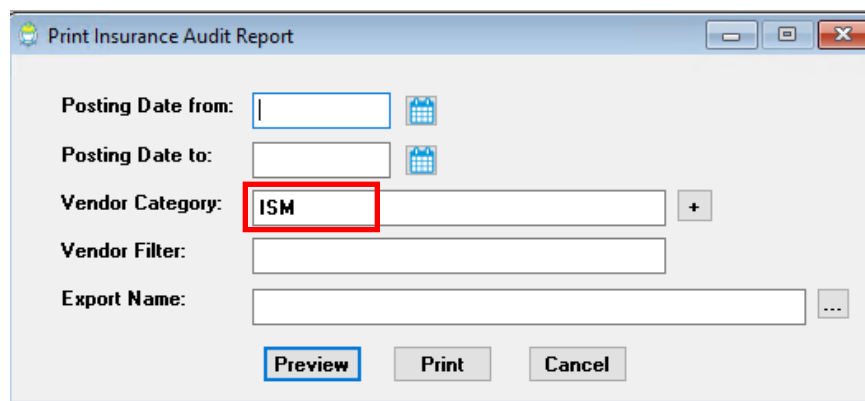
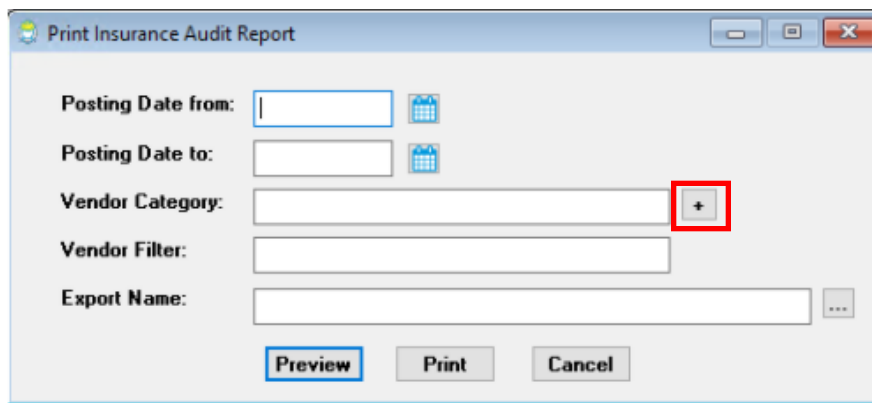
Software Report: GEM-numerous

Numerous internal code changes made to improve integration to the WebPortal

Vendor Insurance Audit Report – Added ability to select multiple CATEGORIES

Software Report: GEM-114

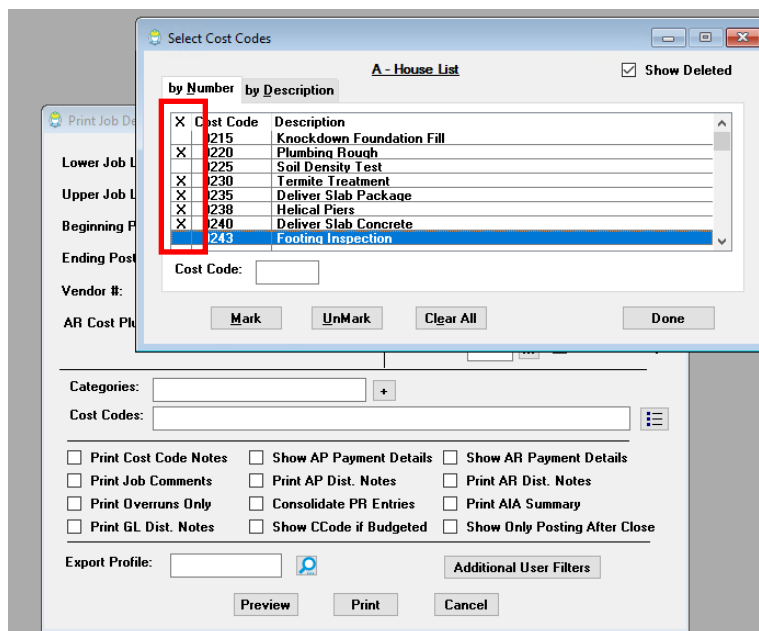
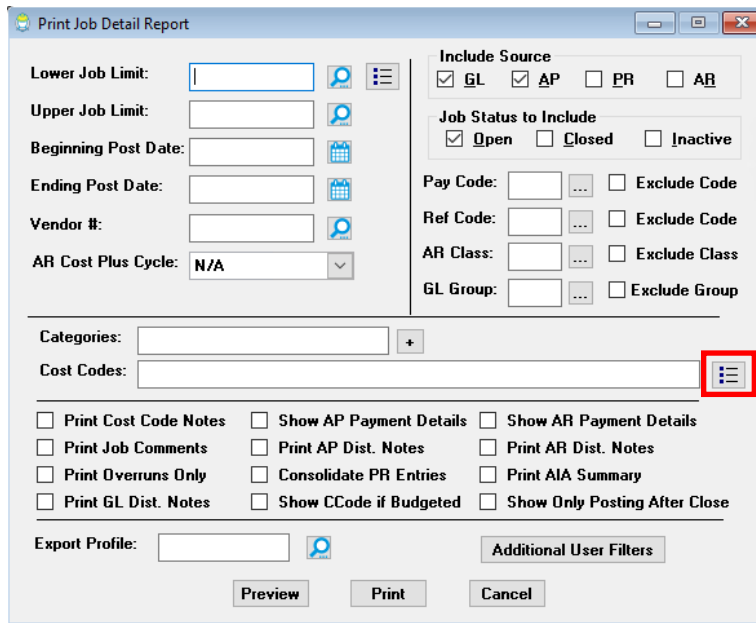
We added a + button to allow a user to run the Insurance Audit report while selecting multiple categories. Previously the report could only be filtered one category at a time.



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.




Builder Incubator
Gemini 2020 What's New

Mar-2020

Release: Gemini 2020a

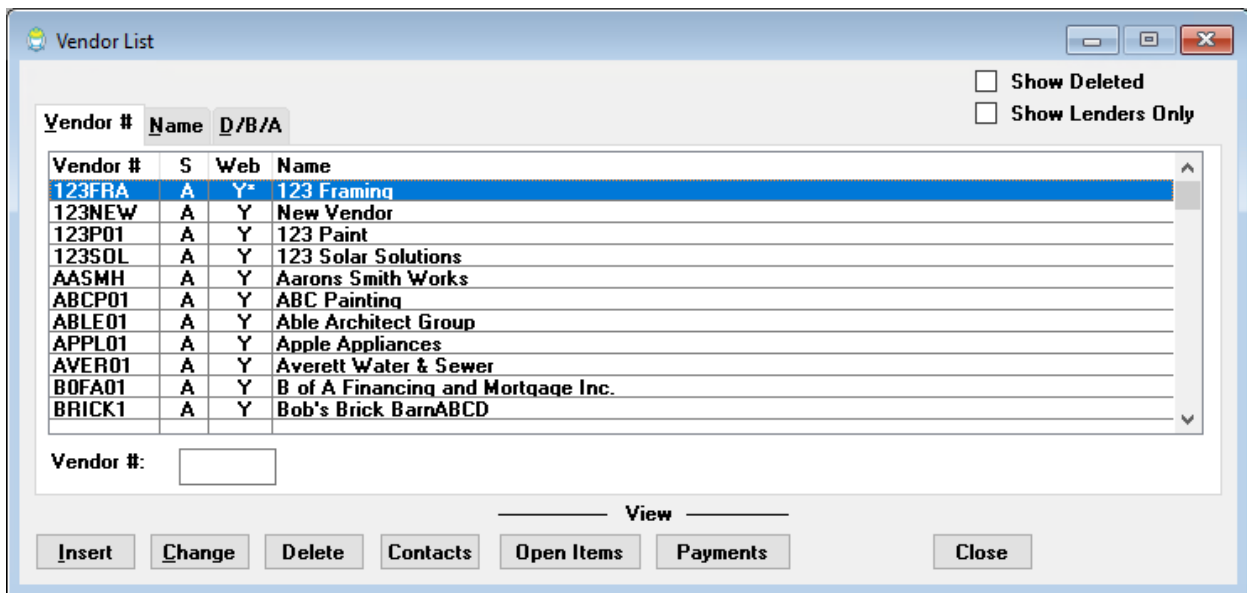
Version: 2020.01.2003.201

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 List

Show Deleted
 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
BDFA01	A	Y	B of A Financing and Mortgage Inc.
BRICK1	A	Y	Bob's Brick BarnABCD

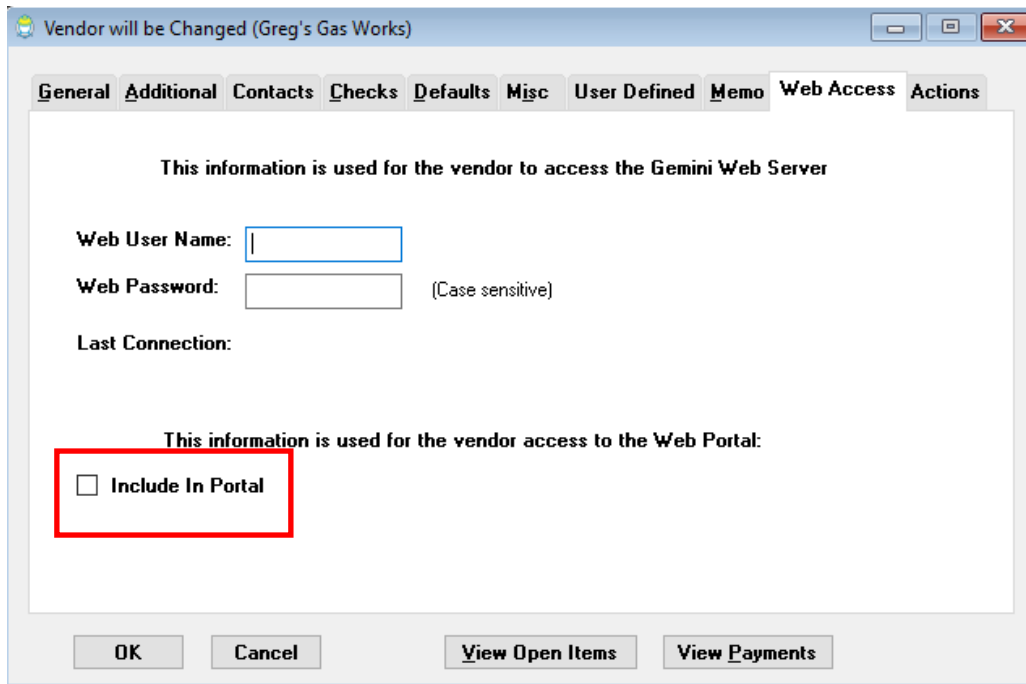
Vendor #:

View

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 will be Changed (Greg's Gas Works)

General Additional Contacts Checks Defaults Misc User Defined Memo **Web Access** Actions

This information is used for the vendor to access the Gemini Web Server

Web User Name:

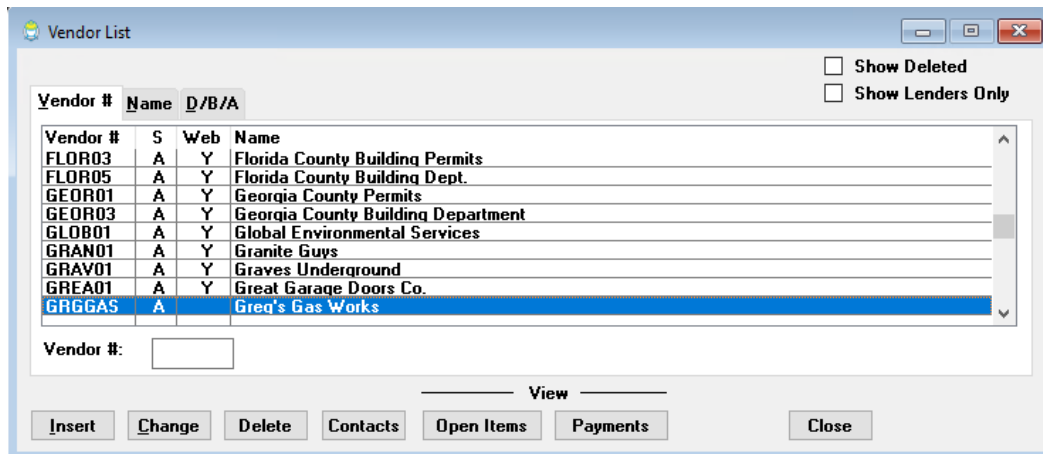
Web Password: (Case sensitive)

Last Connection:

This information is used for the vendor access to the Web Portal:

Include In Portal

OK Cancel View Open Items View Payments



Vendor List

Show Deleted
 Show Lenders Only

Vendor #	Name	D/B/A	Web	Name
Vendor #	S	Web		Name
FLOR03	A	Y		Florida County Building Permits
FLOR05	A	Y		Florida County Building Dept.
GEOR01	A	Y		Georgia County Permits
GEOR03	A	Y		Georgia County Building Department
GLDB01	A	Y		Global Environmental Services
GRAN01	A	Y		Granite Guys
GRAV01	A	Y		Graves Underground
GREAO1	A	Y		Great Garage Doors Co.
GRGGAS	A			Greg's Gas Works

Vendor #:

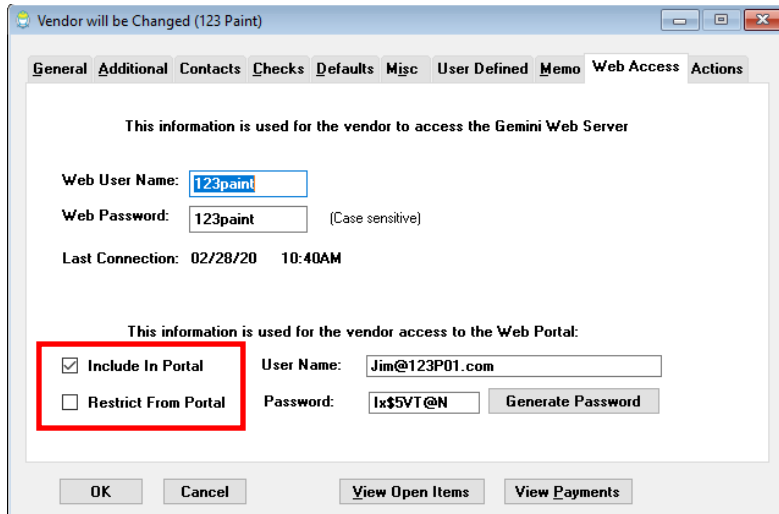
View

Insert Change Delete Contacts Open Items Payments Close

Vendor Maintenance – Include in Web Portal-Restrict from Portal (Continued)

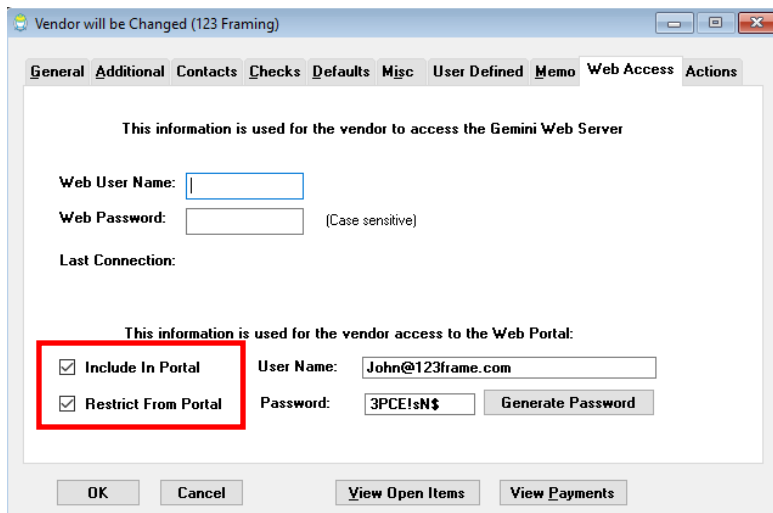
Software Report: GEM-19a

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



The screenshot shows a dialog box titled "Vendor will be Changed (123 Paint)". It has several tabs: General, Additional, Contacts, Checks, Defaults, Misc, User Defined, Memo, Web Access, and Actions. The "Web Access" tab is selected. The dialog contains two sections. The first section, "This information is used for the vendor to access the Gemini Web Server", has fields for "Web User Name" (123paint), "Web Password" (123paint), and "Last Connection" (02/28/20 10:40AM). The second section, "This information is used for the vendor access to the Web Portal:", has a red box around two checkboxes: "Include In Portal" (checked) and "Restrict From Portal" (unchecked). To the right of these checkboxes are fields for "User Name" (Jim@123P01.com) and "Password" (1x\$5VT@N), along with a "Generate Password" button. At the bottom are buttons for "OK", "Cancel", "View Open Items", and "View Payments".

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.



The screenshot shows a dialog box titled "Vendor will be Changed (123 Framing)". It has the same tabs as the previous dialog. The "Web Access" tab is selected. The first section, "This information is used for the vendor to access the Gemini Web Server", has empty fields for "Web User Name", "Web Password", and "Last Connection". The second section, "This information is used for the vendor access to the Web Portal:", has a red box around two checkboxes: "Include In Portal" (checked) and "Restrict From Portal" (checked). To the right are fields for "User Name" (John@123frame.com) and "Password" (3PCE!sN\$), along with a "Generate Password" button. At the bottom are buttons for "OK", "Cancel", "View Open Items", and "View Payments".

Vendor Maintenance – Vendor User Name and Password

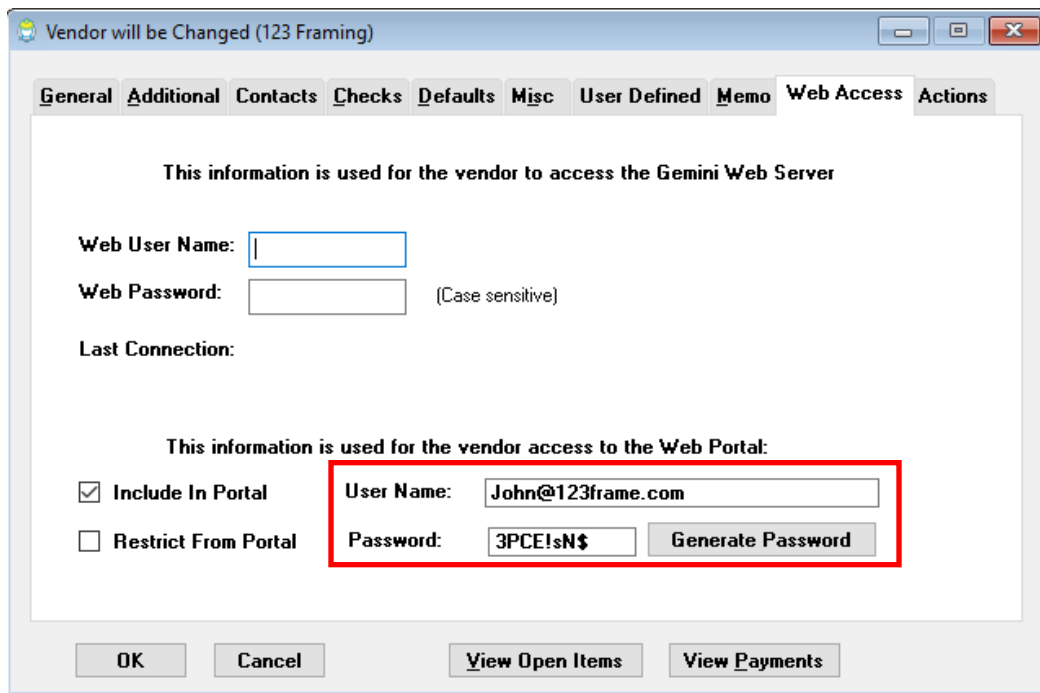
Software Report: GEM-99-b

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 will be Changed (123 Framing)

General Additional Contacts Checks Defaults Misc User Defined Memo **Web Access** Actions

This information is used for the vendor to access the Gemini Web Server

Web User Name:

Web Password: (Case sensitive)

Last Connection:

This information is used for the vendor access to the Web Portal:

Include In Portal

Restrict From Portal

User Name:

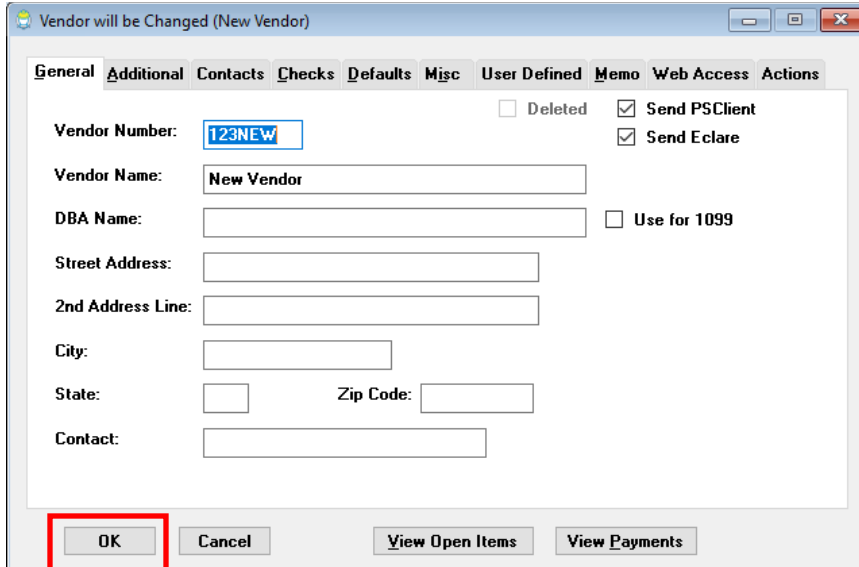
Password:

OK Cancel

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.

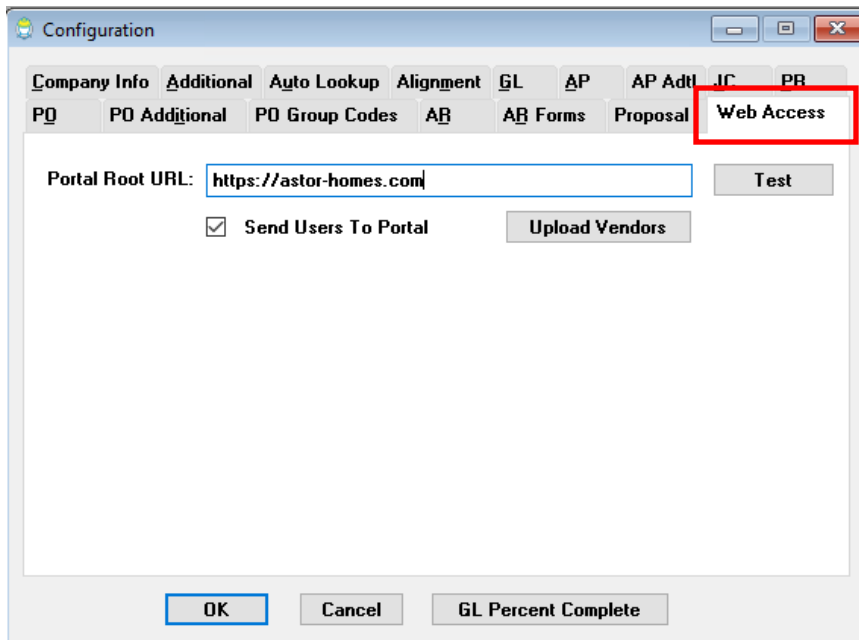


The screenshot shows a dialog box titled "Vendor will be Changed (New Vendor)". It has several tabs: General, Additional, Contacts, Checks, Defaults, Misc, User Defined, Memo, Web Access, and Actions. The "General" tab is active. The "Vendor Number" field contains "123NEW". The "Vendor Name" field contains "New Vendor". There are empty fields for "DBA Name", "Street Address", "2nd Address Line", "City", "State", "Zip Code", and "Contact". On the right side, there are checkboxes: "Deleted" (unchecked), "Send PSClient" (checked), "Send Eclare" (checked), and "Use for 1099" (unchecked). At the bottom, there are buttons for "OK", "Cancel", "View Open Items", and "View Payments". The "OK" button is highlighted with a red box.

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.



The screenshot shows a "Configuration" dialog box with multiple tabs: Company Info, Additional, Auto Lookup, Alignment, GL, AP, AP Adtl, IC, PR, PO, PO Additional, PO Group Codes, AB, AB Forms, Proposal, and Web Access. The "Web Access" tab is highlighted with a red box. The "Portal Root URL" field contains "https://astor-homes.com". There is a "Test" button next to it. Below, there is a checked checkbox for "Send Users To Portal" and an "Upload Vendors" button. At the bottom, there are buttons for "OK", "Cancel", and "GL Percent Complete".

Gemini-Web Portal Configuration removed if Company Copied

Software Report: GEM-98

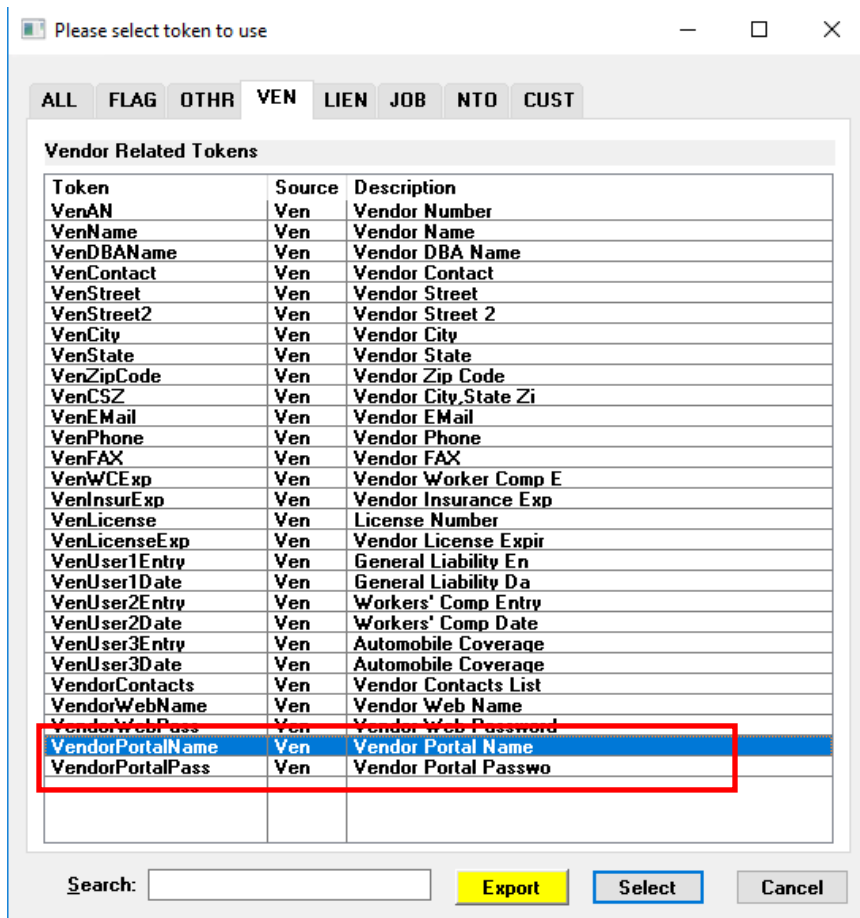
When a Gemini Company is duplicated to create another company – which can be done from time to time for a variety of reasons, we automatically removed the Web Portal configuration details in the resulting new company. This insures no more than 1 Master Gemini company is linked to a builder's Web Portal.

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

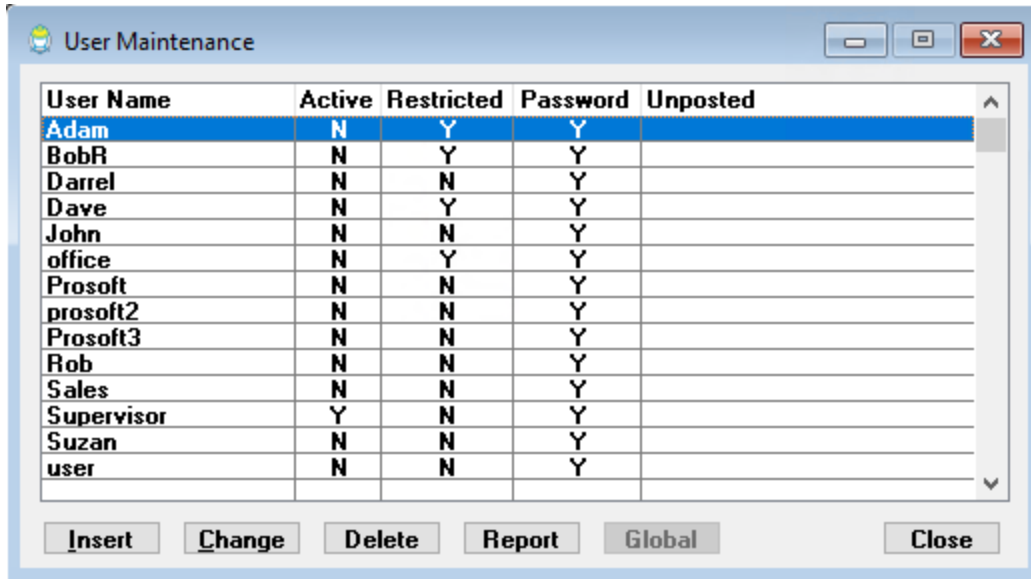
When adding existing or new vendors to the Web Portal Builder's can easily create a mass email and send to all vendors. With the new tokens – this email can also include the Vendor-Admins User Name and Password.



User Maintenance

Software Report: GEM-80

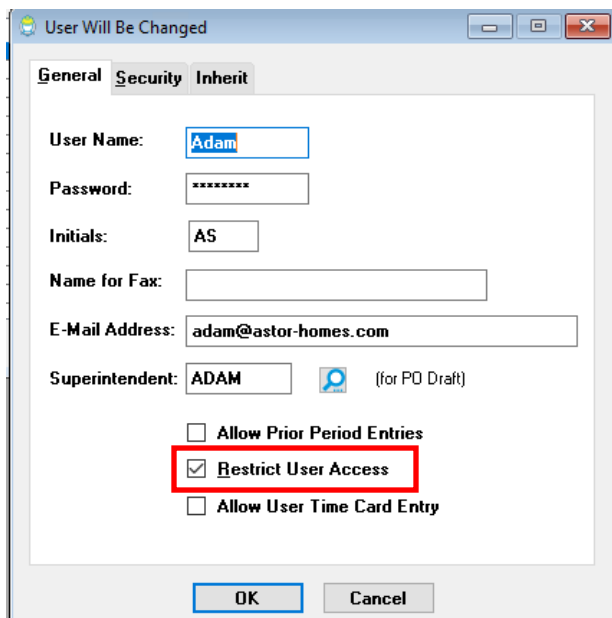
Gemini User Maintenance will be utilized to manage Builder Employees in the WebPortal.



User Name	Active	Restricted	Password	Unposted
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	

Buttons: Insert, Change, Delete, Report, Global, Close

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 Changed

General | Security | Inherit

User Name: Adam

Password: *****

Initials: AS

Name for Fax: _____

E-Mail Address: adam@astor-homes.com

Superintendent: ADAM (for PD Draft)

Allow Prior Period Entries
 Restrict User Access
 Allow User Time Card Entry

OK Cancel

AR Billing Report – expanded \$\$ field

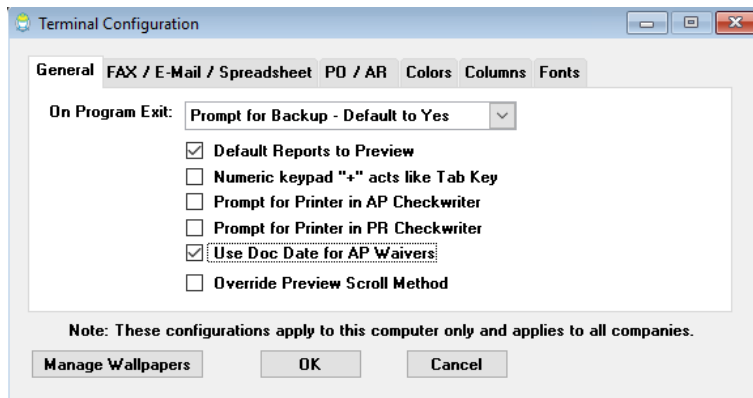
Software Report: GEM-80

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



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 early release of version 2020. 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.

The screenshot shows a software window titled "Changing Job ASG100 - ASG100-Smith-Alaf". The window has several tabs: General, Additional, Legal, User Val, Loan, G/E Val, Comments, PO Notes, Bal Sheet, Liens, and N.T.O. The "General" tab is active. The form contains the following fields and values:

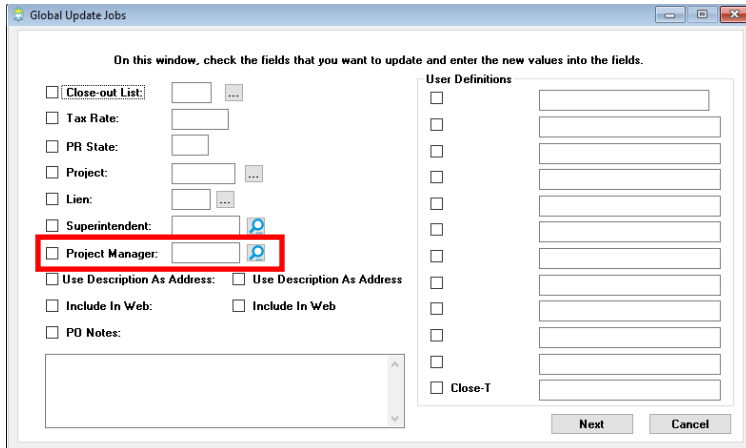
- Job Number: ASG100
- Description: ASG100-Smith-Alafia
- Address: 1547 Northgate
- City/State/Zip: Baltimore MD 21201
- Plan ID: (empty)
- Cost Item List: C
- Close Out List: 1
- Superintendent: ADAM
- Project Code: ASG
- Architect #: (empty)
- Subdivision: Astor Gardens
- Model: Alafia - ASG
- Include In Web:
- Non-Job:
- Deleted:
- Address:
- Job Status: Open (Post to WIP), Direct (Open, Post to P&L), Closed (Post to P&L)
- Exclude % Complete P&L:
- Do Not Allow Posting:
- Start Date: 09/20/18
- Est. Completion: 01/20/19
- Date Closed: 06/30/19
- Asset Account: 98ASG100
- Liability Account: 99ASG100
- Latitude Longitude: (empty)
- Elevation: (empty)
- Project Manager: JS (highlighted with a red box)

At the bottom of the window are "OK" and "Cancel" buttons.

Global Assignment of Project Manager to Gemini JC Header

Software Report: GEM-76-a

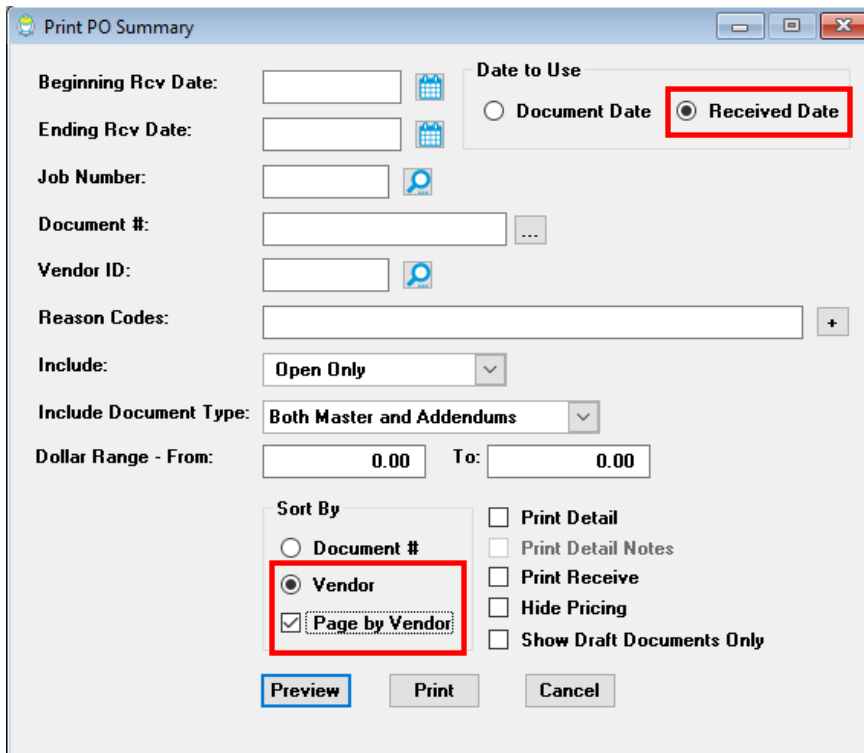
Added the ability to assign or reassign a PM to jobs globally.



Modify the PO Document Summary Report

Software Report: GEM-74

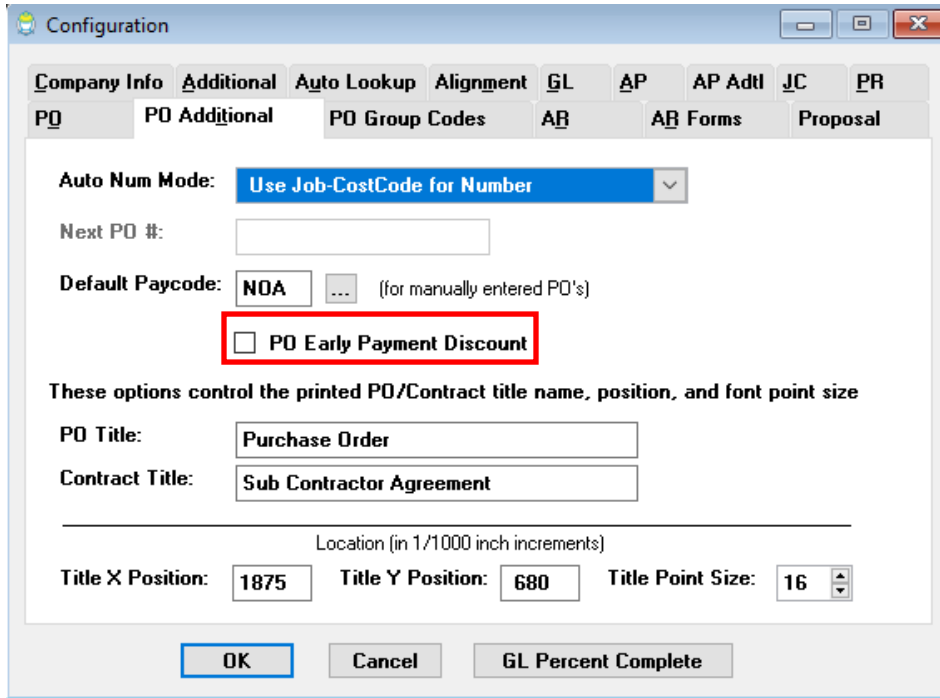
The PO Document Summary report has been modified to allow printing the details based on RECEIPT DATE of the invoice. This is now designed as a supporting report for auto-pay check runs.



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.



Added Job Address to JC Lookup

Software Report: GEM-70

