



## **PSClient 2012 and prior**

**Option Reference Report Name/Address Option**

Program(s): PSClient Software Report: 4699

Reports | Sales Analysis | Option Reference Report

Added a new selection option which allows the user to select either the Client Name or Job Address to be shown on the report output but not both. The user selection is remembered for future use.

**Ignore Model Option Cost Retrieval**

Program(s): PSClient Software Report: 4701

Maintenance | Master Option List | Change  
File | Exchange | Retrieve Model Option Costs  
File | Supervisor | Import | Import Model Option Pricing

Added new "Ignore Cost on Import/Exchange" checkbox in the Exchange Retail Calculations box. When checked, it will cause the program to ignore/override retail cost option changes via Exchange or Import functions.

Master Options List - Individual options now have new "Ignore Costs on Import/Exchange" checkbox.

**Client Proposal Report**

Program(s): PSClient Software Report: 4717

File | Supervisor | Configuration

Added a new 'Hide "Approval Req'd" on Client Proposal' checkbox to the General Information tab. When checked, it will suppress the "Approval Req'd" message on the Client Proposal report.

**Total Contract (Sales Price)**

Program(s): PSClient Software Report: 4759

Reports | Management | Closing Summary [Finacial]

Added new "Use Last Saved Contract Amount" checkbox option to the report setup window. If checked, the report will show the Last Saved Contract Amount instead of the Financial Tab Contract Amount. If a client has not yet had a Saved Contract, then the report will show zero.

**Hide Company on Company Selection Window**

Program(s): PSClient, Eclare, Gemini Software Report: 4770

File | Supervisor | Company Maintenance | Insert/Change

Added a new "Hide Company" checkbox on the Company Maintenance window which can be used to mark a company as "hidden" on the Select Company window during login. A new "Show Hidden Company" checkbox has been added to the Select Company window (which appears during login). When checked, all companies marked as "hidden" will appear on the Select Company window.

**Windows Registry Settings and Microsoft Security Essentials Check \***

Program(s): PSClient, Eclare, Gemini Software Report: 4780

Updated Eclare, Gemini, and PSClient program initialization to:

- a. Check Windows Registry Opportunistic File Locking settings and, if settings are incorrect, to update them.
- b. Check to see if Microsoft Security Essentials is active. If it is active and does not have .TPS files excluded, to show a

warning message but allow program initialization to continue.

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Why the above changes?

a. Opportunistic File Locking (OPL) - Microsoft has reported that if OPL is turned on that there are cases where the system does not properly update the different buffers (details within a file) in all cases which can cause data loss. We have added a change to the system that verifies the settings and updates the OPL settings if not correct.

b. Microsoft Security Essentials (MSE) - All virus checking/protection software checks files for issues. The process of checking slows systems down and could cause failure (timeouts) resulting in the program not responding. MSE has been reported to cause issues on database files. MSE is being used by a large number of users (due to it being free). We are able to determine if TPS files have been excluded in MSE and give a warning until the correction has been made. As a side note, it is recommended that TPS files also be excluded from being checked in other virus checking programs.

### **Client Profile Report Export Change**

Program(s): PSClient Software Report: 4788

Reports | Client Profile Report

Changed the export on this report to optionally use the "User Defined" labels for fields where available instead of the fixed labels.

### **Color/Client Reference Report - Filter**

Program(s): PSClient Software Report: 4812

Reports | Color Selection | Color / Client Reference

Changed the Color / Client Reference report to ignore a tilde character (~) and everything that follows it in the color selection description when comparing a client selection and the master list.

For example, if the Master Color has a selection for "White", then changing the description for White would cause the report to not find a match because it has been changed. However, if you were to change the description using the tilde character to "White ~Do Not Use", then the proper relation to client options already selected would be maintained.



## **PSCient 2011**

**Job Gross Margin Report**

Program(s): PSClient Software Report: 4111

Added a new report called "Job Gross Margin".

IMPORTANT: Note there is a change in the format of the Base information when exporting. There is now a separate "Retail Price" column which is set to zero by Eclare and requires that you fill in the information manually.

**Loan Type Description**

Program(s): PSClient Software Report: 4586

Increased the loan description from 10 to 30 characters.

**Clients Browse List**

Program(s): PSClient Software Report: 4589

A new option has been added to the "File; Terminal Setup" window called "Clear Client Browse Filters on Open".

When checked this will clear the last client view filters each time that client browse list is opened, in effect showing ALL. This selection is saved in the local INI and therefore applies only to the local computer.

**Client Document Folders**

Program(s): PSClient Software Report: 4596

"Client Documents" folder names are now user defined. In "File; Configuration" on the "Misc Info 2" tab, there are 8 user defined folder names. These are in addition to the fixed folder named "Album" which is always created.

Once defined, the new structure is available within the Client Documents option. Existing (older) folder will be left unchanged even if not in the current configuration list.

**Client; Finance Tab Lendor info**

Program(s): PSClient Software Report: 4609

Added "Lendors" button to the Contract tab giving access to the same information available on the Finance tab.

**Client Status**

Program(s): PSClient Software Report: 4618

Added a new Client Status of "Other". This behaves much the same as "Internal" in it's exclusion from some of the reports. Reports have been updated to allow filtering on this new type.

Note that there is also a new security option in User Maintenance on the "Client Status" tab. By default this will be unchecked for all users.

**Maint; Option List; Model**

Program(s): PSClient Software Report: 4626

Added a new check box "Show Include Only". When checked, this restricts the list of models to just those that have the "Include" checked.

**Schedule; Daily To-Do Report**

Program(s): PSClient Software Report: 4650

You can now filter by "Subdivision"

**To Do List Filter**

Program(s): PSClient Software Report: 4669

Expanded the pull down window to show 20 items instead of 10 for easier selection.

**Schedule; Quick Schedule Update**

Program(s): PSClient Software Report: 4675

Added logic to check Task Predecessors and show warning as needed. This uses the same rules as the normal Task Edit (Client; Edit; Schedule; Edit).

**Web Manager Enhancement**

Program(s): PSClient, Gemini, Other Software Report: 4696

Added support for both multi-file insert and delete. Also changed the program to remember the last-used file location.



## **PSCient 2010**

**Summary Closing & Pipeline Report Enhancements**

Program(s): PSClient Software Report: 4319

Clients | Insert/Change | Departments | Finance 2

Clients | Insert/Change | Schedule | Insert/Change | Additional | Link To | Construction Completed

Maintenance | Subdivision & Lots | Insert/Change | Budgets

Reports | Management | Summary Closing & Pipeline Report

Added a new "Exclude Spec Homes" checkbox to the report setup window and expanded the Pipeline Report to also tally "Completed" construction. This is based on a new date field in the Client Header Finance 2 tab which may also be linked to a Schedule Task for automatic update.

**Copy Color Selections Window Enhancement**

Program(s): PSClient Software Report: 4326

Maintenance | Color Choice | Copy Color Selections

Changed the characteristics of the Copy Color Selections window to allow it to be resized by the user.

**Warranty Enhancement**

Program(s): PSClient Software Report: 4385

Client | Transactions | Insert/Change | ToDo Type | W:Warranty

Maintenance | Administrator | Tx Document Maintenance | Warranties | Tokens

Reports | Warranty

Added a new "Exempt" checkbox to the client Warranty Transaction window which allows a warranty to be marked as Exempt (not the fault of the vendor). The information is then used to update the Warranty Request, Warranty Summary , and Warranty Activity reports. When unchecked, a new Warranty Activity report setup checkbox, "Include Exempt Warranties", allows the user to exclude those warranties marked "Exempt" to correctly denote that a vendor is not at fault.

A new token, "TxWExempt", has been added for use in warranty letters.

**Transactions Browser Window Enhancement**

Program(s): PSClient Software Report: 4441

Client | Transactions

Added the primary Co-Buyer name to the browser window (top left).

**AP Vendor Expiration Report Enhancement**

Program(s): PSClient, Gemini Software Report: 4450

AP | Reports | Vendor Reports | Vendor Expirations

Added a new "Expiration Earliest Date" filter field to the report. If a date is entered, the report will only show vendor expirations on or after the specified date.

**Added Client First Name to ToDo Report**

Program(s): PSClient Software Report: 4461

Reports | ToDo List

Added the client's first name to the ToDo report using the phone number checkbox option which has been changed to "Show First Name and Phone".



**Contract Proofing Report Enhancement**

Program(s): PSClient Software Report: 4488

Clients | Insert/Change | Model Options | Change | Notes

Clients | Insert/Change | Contract | Print Contract | Proofing Report

Added Client Notes to the Contract Proofing Report which will output any user-entered Model Option Notes.

**Client Model Pricing Enhancement**

Program(s): PSClient Software Report: 4494

File | User Maintenance | Insert/Change | Security 2

Clients | Change | Model Options | Reprice Model

Added a new "Reprice Model" button on the Client Header Model Options window. When the Reprice Model button is selected, a browser displays each included option with both current (client) and new price columns. Options eligible for repricing may be individually selected. An addendum is created by "saving" the contract to complete the transaction.

To access the new option, user's must have (new) "Reprice Client" security authority and the client must have a lot assigned on the Finance tab. New prices are extracted from updated Maintenance Master Option List, Subdivision & Lots, and Model options information.

**Added Security for Client Status**

Program(s): PSClient Software Report: 4508

File | User Maintenance | Client Status

File | Supervisor | Configuration | General Information

Added a new User Maintenance "Client Status" security tab which allows you to specify Client Status maintenance options for a given user. If an existing client's record has a status option which is not in a user's approved list, the Client Status pulldown will be disabled. If the existing client's status is in the approved list (or a new client is being added), then the Client Status pulldown will reflect only the user's approved status options.

Also added a new Configuration "Create Client Transaction on Status Change" checkbox which, when checked, will automatically create status change transaction records.

**Vendor List Enhancement**

Program(s): PSClient Software Report: 4523

Scheduling | Maintenance | Vendor List | Insert/Change

Clients | Insert/Change | Departments | Finance

Added a "Lender's Only" checkbox to the Vendor List browser header which can be used to restrict the vendor list to just those vendors marked as lenders for quicker selection. The Lender's Only checkbox can be changed on-the-fly when accessed through the Finance tab Construction or Permanent fields.

Vendors are designated as lenders using the Lender checkbox on the Vendor Maintenance General tab.

**TxText Maintenance Enhancement**

Program(s): PSClient, Eclare, Gemini Software Report: 4527

Eclare and Gemini: File | TxText Maintenance

PSClient: Maintenance | Administrator | TxDocument Maintenance

Added a new token, "VendorContacts" (txVendorContacts in PSClient), that allows pre-defined Vendor Contacts information to be output to TxText documents.

**Print Vendor Letters Enhancement**

Program(s): PSClient, Eclare, Gemini Software Report: 4528

Eclare: File | Print Vendor Letters

Gemini: File | Print Vendor Letters

AP | Reports | Print Wavier of Lien

Added new logic to handle repetitive user-entered values for multiple tags at report runtime. Runtime user entry fields are created in TxText documents using the File | TxText Maintenance | New Doc/Open Doc | Insert | User Entry option.

**TxText Warranty Documents**

Program(s): PSClient Software Report: 4529

Client | Transactions | Insert/Change | Print Letter

Changed the program to automatically default to the TxText "Warranties" folder if the current client transaction ToDo Type is Warranty. Once the appropriate Warranty TxText document has been selected, if it is saved, it will still be saved in the Letters folder as before.

**Access to Vendors in Transactions**

Program(s): PSClient Software Report: 4538

Clients | Transactions | Insert/Change

Added a new "R: Request" fixed Client ToDo Type Transaction which behaves the same as other user defined types except that a Vendor may be selected as part of the transaction creation. It's purpose is to allow a vendor that relates to the transaction type to be selected so that related TxText tokens are available when printing.

**Client Purge Date**

Program(s): PSClient Software Report: 4554

File | Supervisor | Configuration | General Information tab

Clients | Insert/Change | Add'tl General tab

File | Supervisor | Remove Old Clients

Added two new fields, a "Days Before "X" Client is Purged" on the Configuraiton General Information tab and a "Purge Date" field on the Clients Add'tl General tab. When a client's status is changed to "X", the purge date will automatically be set to the current date plus the number of days, if any, entered in the 'purge days' field.

The Purge Date is subsequently used in conjunction with the Purge Through Date field in the Remove Old Clients option. The underlying concept is that client history can be maintained for a given minimum period of time before it is deleted.

**Expanded Check for Duplicates**

Program(s): PSClient Software Report: 4555

Maintenance | Administrator | Check Duplicates

Added a new client Duplicate Check option, "One Client Only (Name, Co-Buyer and Phone)", designed to see if a specific client has any other duplicates. Both the Client's and the Co-Buyer's last names are cross-checked against each other as well as Phone1.

**Contract Addendums**

Program(s): PSClient Software Report: 4563

Clients | Insert/Change | Departments | Finance tab

Clients | Insert/Change | Contract tab | Version

Added a new "Addendum Base" option on the Finance Tab. When the new "Set Base" button is selected, you may select which Addendum number should be considered to be base or zero. Once selected, the Base Addendum will subsequently be reflected on the Contract Proofing Report and will also be available as a new "AddendumAdj" TxText token.

NOTE: To be able to save a new Addendum Base choice, you must first save the client record at the prior window.

**Maintenance | Administrator | Transfer Client Information**

Program(s): PSClient Software Report: 4635

Added a new option, "Omit "Visit" Client Transaction Detail" to the Items to Copy box. When checked, no "V" records will be copied during Client information transfer.

**Import Model Pricing - Update Color Only**

Program(s): PSClient Software Report: 4639

File | Supervisor | Import | Import Model Option Pricing

Added a new check box option, "Update Color Codes Only (No Price Updates)" to the option setup window. When checked, NO PRICING IS UPDATED during data import. The purpose of the new option is to allow color selection information to be quickly updated without affecting pricing.

**Relocate Program .INI File Location**

Program(s): PSClient, Eclare, Gemini Software Report: 4656

Changed the Eclare, Gemini, and PSClient initialization (.INI) file default location to be the user's Documents and Settings folder. For example, C:\Documents and Settings\User Name\My Documents\Prosoft\Gemini.INI. The change will improve Prosoft's program compatibility with Windows XP\*, Vista\*, and the newer Version 7\* (tentatively scheduled for release in October 2009) Operating Systems.

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