



Scheduling: View Only Security Enhancement

Program(s): PSClient Software Report: 4944

File | User Maintenance | Insert/Change

Scheduling | Job Schedules

Added a new "Scheduling (View Only)" access option to the Security tab. When selected, it will allow a user to view Scheduling Job Schedules but not to be able to make any Scheduling changes. When in View Only mode:

- Many program functions will be disabled
- "View Only" will appear in the window title bar
- The "Change" button will be replaced with "View"
- Users can still use the Mark/Unmark buttons but the functionality is internally disabled

If a user has this option selected in their security profile, they will be restricted in the Job Schedule area as it will override other settings. For example, if a user's "Scheduling" security access option is checked and they should be able to make Scheduling changes, the Scheduling (View Only) option should NOT be checked.

File: Export Master Options

Program(s): PSClient Software Report: 4971

File | Supervisor | Export | Export Master Options

Added a new "Export Master Options" option. It will export Master Options to a .CSV file in same format used to import Master Options using the File | Supervisor | Import | Import Master Options option.

NOTE: The Import Master Options function does NOT 'update' existing Master Options information contained within the import file. Thus, the export created by the new Export Master Options option just provides a method to see what is currently defined in the Master Options list and allows the user to ADD new Master Options to the file which can subsequently be imported.

Scheduling: Quick Schedule Update

Program(s): PSClient Software Report: 4975

File | Terminal Setup | Scheduler Colors

Adding the ability to color-code lines based on "Start Date" versus today. Colors and date ranges defined in the Terminal Setup area apply to all users using a given computer or workstation.

ALL: File: Hide/Unhide Browse Window Columns, Resize Column Widths, Remember

Program(s): PSClient, Eclare, Gemini Software Report: 4977

ECLARE: File | Terminal

GEMINI: File | Terminal | Columns

PSCLIENT: File | Terminal | Columns

1. Added a new "Select Columns to Show" option to all programs. When accessed, it provides the ability to selectively hide/un-hide browse window columns as well as vertical and horizontal lines and to adjust individual column widths in most of each program's browse list windows.

- To access the new option, place your mouse cursor inside a given browse window's data display box (the browse window's "white" area) and right-click. Select the option from the pop-up menu which will appear.

- When hiding columns, at least one column must be shown. Please note that, when dealing with browse windows with multiple tab options, one or more browse tabs may be blank (no columns showing) depending on what columns are hidden and from which browse tab they are hidden.

- Browse list display changes are remembered from one work session to the next. They are company and computer/work station specific and apply to all users who access a given company on a given computer/work station.

- If a given column width is changed and the column is subsequently hidden and then shown again, it will revert to the

original default column width - not the resized width prior to being hidden. It can be manually resized again if desired.

2. Added a new "Reset Columns Format" button to each program's Terminal area as noted, above, which allows the user to reset browse window displays back to their original display formats. Please note that use of this button resets ALL browse window displays within a given company back to their original display formats and cannot be "undone" (but display formats can be defined again).

Client: Model Options Browser Redesign

Program(s): PSClient Software Report: 4980

Clients | Insert/Change | Model Options OR Clients | Transactions | Client Header | Model Options

Maintenance | Master Option List

Maintenance | Master Option Locations

Maintenance | Master Option Categories

Reports | Setup Reports | Master Model Report

Reports | Setup Reports | Master Option Groups

Reports | Setup Reports | Master Model

Reports | Setup Reports | Master Option Display Groups

Reports | Setup Reports | Master Option Hide Groups

The Model Options browser window has been redesigned; it has been split into left and right panels. The left panel is arranged in a "tree" format while the right panel is, essentially, unchanged from previous versions.

The new left panel allows model options to be searched/displayed by Location ("Loc") such as Bedroom 1, Bedroom 2, Kitchen, and so on by Category), by Category ("Cat") for example, Floors, Cabinets, Walls by Location), or by "Show All" (basically, displays as in previous versions).

Added new "Master Option Locations" and "Master Option Categories" browsers which allow both Locations (such as Bedroom 1, Bedroom 2, Kitchen, and so on) and Categories (such as Floors, Cabinets, Wall, and so on) to be pre-defined and subsequently entered on the Model Options definition window.

Added new Location, Category, Display Group and Hide Group fields as well as a Master Display/Hide checkbox to the Master Option item window.

Both Display Group and Hide Group options may be selected if the Master Option is both "Master" types. For non-Master type option items, the Display Group or Hide Group may be selected, but not both.

New fields have been added to various model and group reports.

Reports: Show Master Option List Notes on Color Selection Report

Program(s): PSClient Software Report: 4984

Maintenance | Master Option List | Insert/Change

Reports | Color Selection | Color Selection Report

Added a new "Show Notes on Color Selection Report" checkbox to the Master Option setup menu. If checked, when the Color Selection Report is printed, it will append information contained in the Internal Notes field to the Option Description on that report.

Maintenance: Master Option Enhancement

Program(s): PSClient Software Report: 4985

Maintenance | Master Option List

Added an "Insert/Copy" button which, when selected, will insert a NEW duplicate of the currently highlighted record and automatically open it for editing. As a minimum, in order to save the new record, the Option Number must be different than the record from which it is being copied.

Maintenance: Model Edit Enhancement

Program(s): PSClient Software Report: 4986

Maintenance | Models | Insert/Change

Added a "Headers Only (F9)" check box immediately above the Options browser window. If checked, it will restrict the Options list to Option headers only. The F9 function key has also been set up as a hot key toggle switch and, when pressed, will perform the same function as clicking on the checkbox with your mouse.

Note: On some keyboards, you may need to use the "F-Lock" function key to activate the F9 key.

Clients: Clients Browse Window Enhancement

Program(s): PSClient Software Report: 4987

Clients

Added "*Custom 1", "*Custom 2", and "*Custom 3" filters to the Client Status pulldown menu which allows users to define multiple status options to be included in the Clients browser window. The first time one of the Custom options is accessed, the Status will default to 'All'.

When one of the new Custom filter options is selected, a "Def" button will appear to the right of the selection field. Clicking on the "Def" button will allow the user to define/redefine the custom filter "Display Label" as well as select which Client Status options will be listed in the Clients browser window.

The Custom filter options are 'user defined' and apply only to the user(s) on a given computer or workstation.

Maintenance: Sales Teams

Program(s): PSClient Software Report: 4988

Maintenance | Administrator | Sales Associate

Maintenance | Administrator | Sales Teams

Maintenance | Administrator | Global Sales Teams Update

Clients | Insert/Change | General tab

Reports | Client Profile Report

Reports | Client Detail Report

Reports | Setup Reports | Master Sales Teams

Added new "Sales Teams" selection options which, in concept, provides another method to control access to clients.

- Sales Teams can be defined, Sales Associates can be assigned to Sales Teams, and the Client browser can be filtered by Sales Teams in the Maintenance module.

- Individual clients can be assigned to a Sales Team in the Client module.

- Various reports provide Sales Teams feedback information. Also, a "Sales Team" token allows Sales Team information to be exported through the Client Profile Report Export ID setup option.

Maintenance: Added New Token to Tx Document Module

Program(s): PSClient Software Report: 5004

Maintenance | Administrator | Tx Document Maintenance

Added a new "LastSavedAddendum#" Contract token which contains the last saved addendum number information (which would be either "Pending", "Original", or the number of the last saved addendum). The token ignores any pending (unsaved) information.

Clients: Disable Client Model Exception Checking

Program(s): PSClient Software Report: 5008

File | Supervisor | Configuration | Misc Info 2
Clients | Insert/Change | Model Options

Added an "Exception Checking Disabled" checkbox to the Clients Model Options browser window which, if active and checked, will appear in red. Primarily used when selecting Client Model Options for new Clients. The default setting in the Configuration area is set to "Always Perform Exception Checking". Disabling exception checking may provide an increase in speed.

Master Option Exception statuses (R=Required, E=Exclusive, D=Display, +=Hidden Qty, D=Display No Master, H=Hidden No Master) will appear in a new "EX" column in the browser window.

Configuration settings can be changed to allow users to enable or disable Model Option exception checking as desired when a new client is added.

- "Always Perform Exception Checking" - Checkbox option is inactive (cannot be changed by user).
- "Exception Checking defaults to Enabled" - Checkbox option is active, unchecked, can be changed by user.
- "Exception Checking defaults to Disabled" - Checkbox option is active, checked, can be changed by user.
- "Exception Checking On-Demand Only" - Checkbox option inactive (cannot be changed by user). EX column status for all Master Options will display as two dashes ("--"). User can still manually click on the Exception button to the left of the browser window to view exception status.