



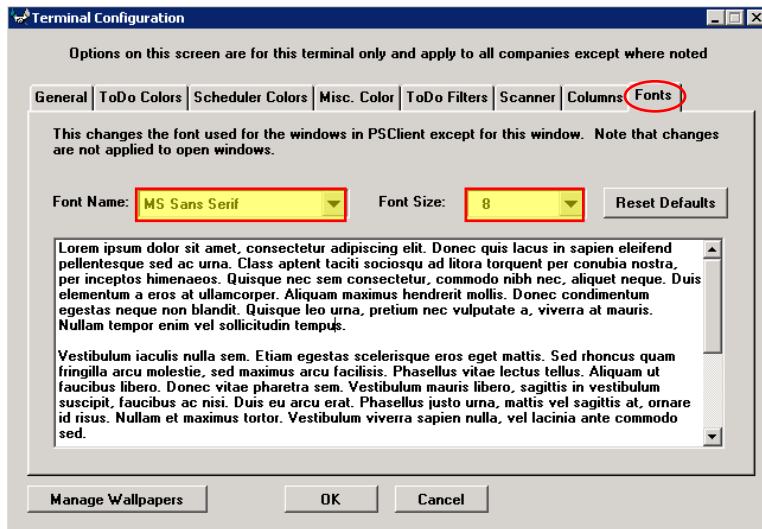
Adjusting Fonts and Sizes

Software Reporting: 5173

Individual users can now select the FONT STYLE and FONT SIZE to meet their individual needs.

Go to FILE | TERMINAL SETUP | Fonts tab

Select the FONT NAME (Style) and FONT SIZE from the drop down lists

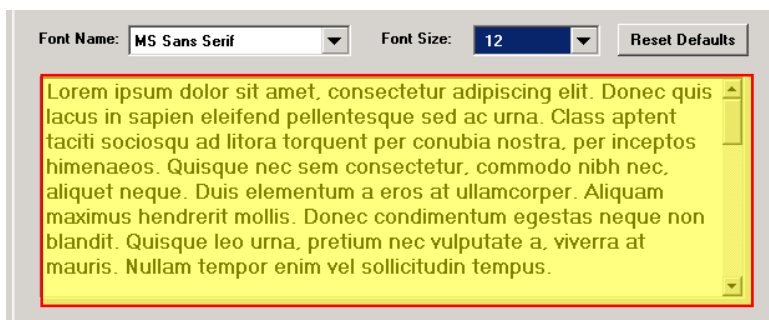


These settings are specific to a user's workstation (or a user's log in if working in Remote Apps or Remote Desktop). Therefore, each user can select a font style which best suits their needs.

Printed Reports remain in the standard font and will not reflect these changes.

By design, some windows (such as system messages) will not change.

The "Lorem ipsum" paragraph will display how each font selection will appear.



New report assists builders in determining WHICH Standard Options are selling.

Software Reporting: 5172

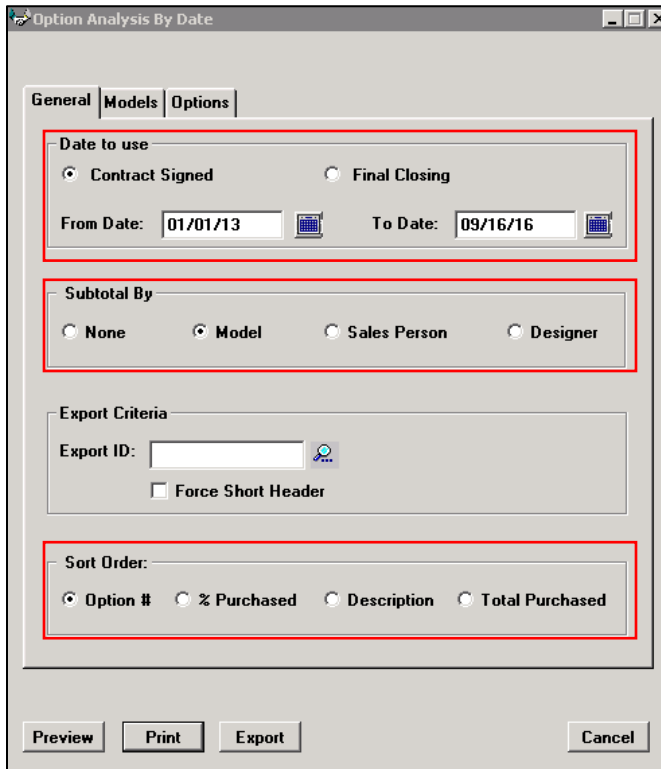
PSClient now has a new report – Option Analysis by Date which allows builders in determining which standard options are selling:

Go to REPORTS | SALES ANALYSIS | Options Analysis by Date

From the General tab, builders can select the time period for either the Contract Signed or Final Closing dates.

The report can be subtotaled by NONE, MODEL, SALES PERSON, or DESIGNER.

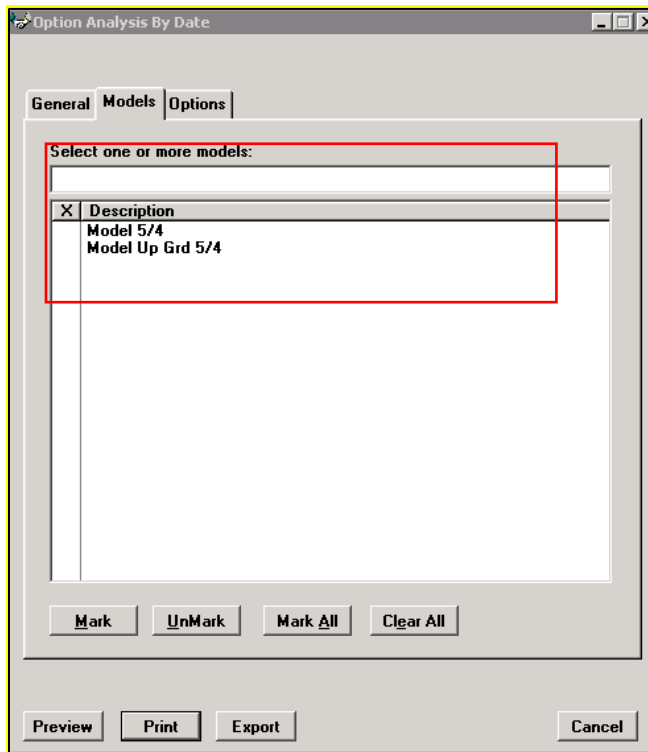
The sort order for the report can be by OPTION #, % PURCHASED, DESCRIPTION OR TOTAL PURCHASED.



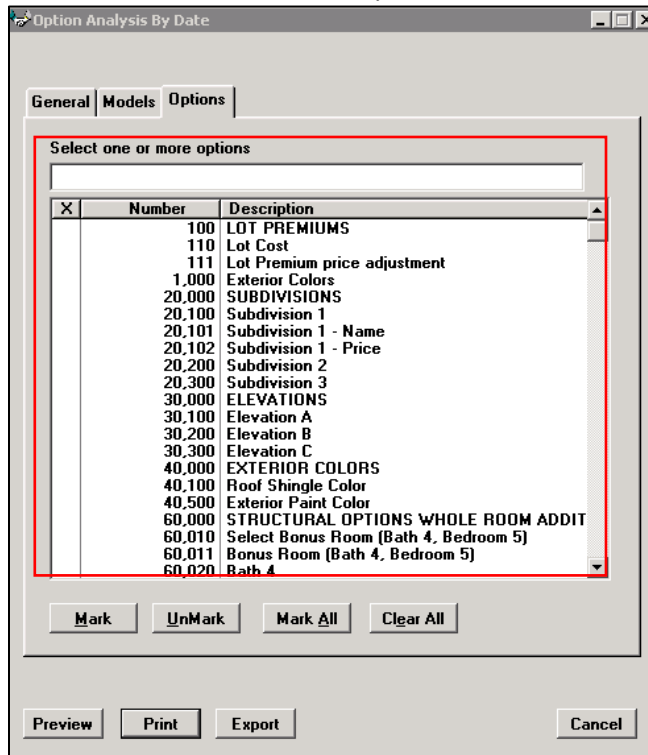
The screenshot shows the 'Option Analysis By Date' dialog box with the following configuration:

- Date to use:** Contract Signed, Final Closing
- From Date:** 01/01/13
- To Date:** 09/16/16
- Subtotal By:** None, Model, Sales Person, Designer
- Export ID:** (empty field)
- Force Short Header:**
- Sort Order:** Option #, % Purchased, Description, Total Purchased

Users can select one or more Models.



Users can select one or more options.



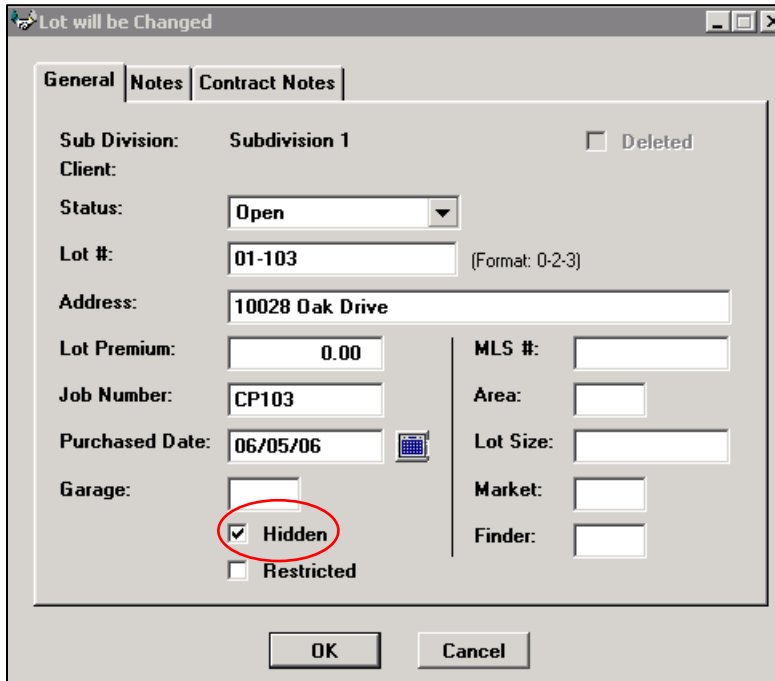
HIDE Lots to users who do not have security access to Lot Inventory.

Software Reporting: 5166

PSClient has added the feature to HIDE lots in the Lot Master Report to users who do not have security access to Lot Inventory.

Go to MAINTENANCE | SUBDIVISION & LOTS

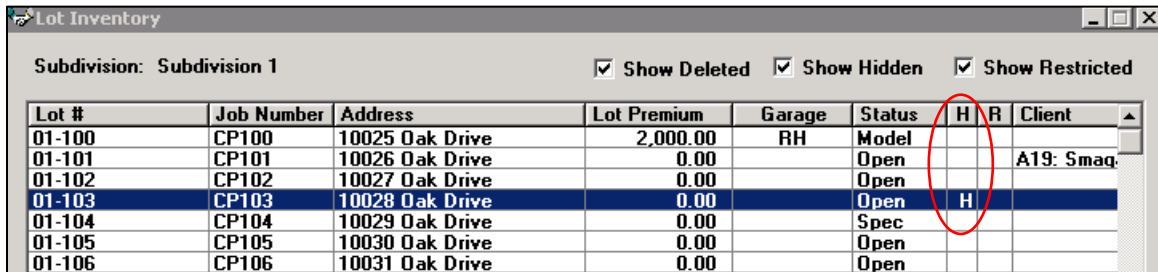
To hide a lot in the Lot Inventory, select HIDDEN.



Sub Division: Subdivision 1 Deleted
 Client:
 Status: Open
 Lot #: 01-103 (Format: 0-2-3)
 Address: 10028 Oak Drive
 Lot Premium: 0.00
 Job Number: CP103
 Purchased Date: 06/05/06
 Garage: Hidden Restricted
 MLS #:
 Area:
 Lot Size:
 Market:
 Finder:

On the Lot Inventory screen with the Show Hidden feature selected, the lot is shown with an H identifying it as a hidden lot from those without security access to the lot inventory.

Users without security access to the lot inventory will not be able to VIEW the hidden lot.



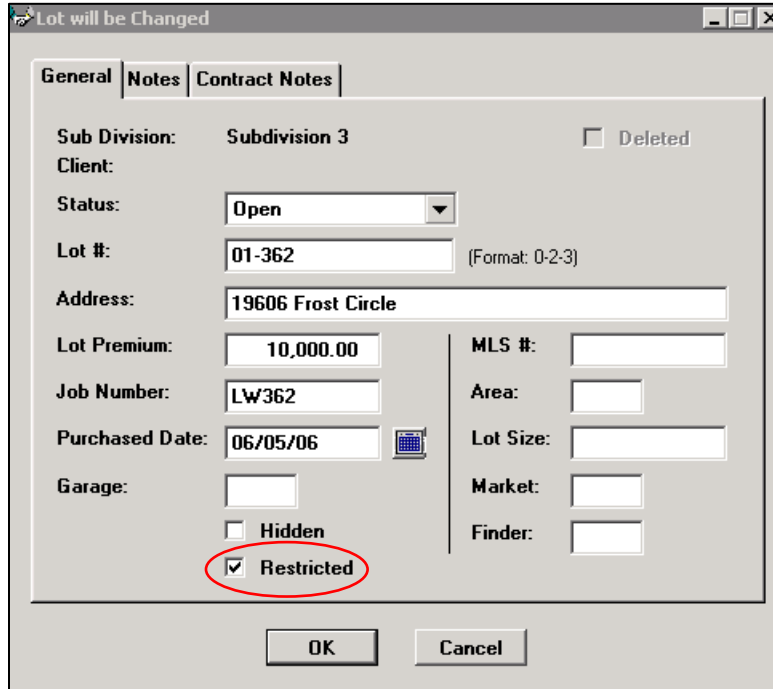
Subdivision: Subdivision 1 Show Deleted Show Hidden Show Restricted

Lot #	Job Number	Address	Lot Premium	Garage	Status	H	R	Client
01-100	CP100	10025 Oak Drive	2,000.00	RH	Model			
01-101	CP101	10026 Oak Drive	0.00		Open			A19: Smaq
01-102	CP102	10027 Oak Drive	0.00		Open			
01-103	CP103	10028 Oak Drive	0.00		Open	H		
01-104	CP104	10029 Oak Drive	0.00		Spec			
01-105	CP105	10030 Oak Drive	0.00		Open			
01-106	CP106	10031 Oak Drive	0.00		Open			

Restricted Lots in the Lot Inventory

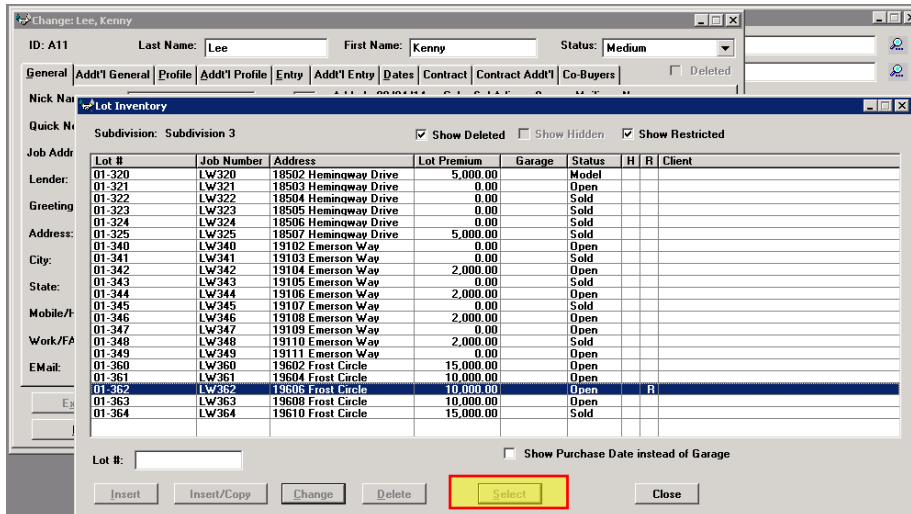
Software Reporting: 5167

Lots can now be marked as RESTRICTED



Lot will be Changed
 General | Notes | Contract Notes
 Sub Division: Subdivision 3 Deleted
 Client:
 Status: Open
 Lot #: 01-362 (Format: 0-2-3)
 Address: 19606 Frost Circle
 Lot Premium: 10,000.00 | MLS #:
 Job Number: LW362 | Area:
 Purchased Date: 06/05/06 | Lot Size:
 Garage:
 Hidden
 Restricted

If the RESTRICTED has been checked ON - the SELECT button will be greyed out if the restricted lot is highlighted, preventing the user from selecting the lot and adding to a client.



Change: Lee, Kenny
 ID: A11 | Last Name: Lee | First Name: Kenny | Status: Medium
 General | Add'l General | Profile | Add'l Profile | Entry | Add'l Entry | Dates | Contract | Contract Add'l | Co-Buyers | Deleted
 Nick Name: **Lot Inventory**
 Subdivision: Subdivision 3 Show Deleted Show Hidden Show Restricted

Job Addr	Lot #	Job Number	Address	Lot Premium	Garage	Status	H	R	Client
Lender:	01-320	LW320	18502 Hemingway Drive	5,000.00		Model			
	01-321	LW321	18503 Hemingway Drive	0.00		Open			
Greeting:	01-322	LW322	18504 Hemingway Drive	0.00		Sold			
	01-323	LW323	18505 Hemingway Drive	0.00		Sold			
	01-324	LW324	18506 Hemingway Drive	0.00		Sold			
Address:	01-325	LW325	18507 Hemingway Drive	5,000.00		Sold			
	01-340	LW340	19102 Emerson Way	0.00		Open			
City:	01-341	LW341	19103 Emerson Way	0.00		Sold			
	01-342	LW342	19104 Emerson Way	2,000.00		Open			
State:	01-343	LW343	19105 Emerson Way	0.00		Sold			
	01-344	LW344	19106 Emerson Way	2,000.00		Open			
Mobile/F:	01-345	LW345	19107 Emerson Way	0.00		Sold			
	01-346	LW346	19108 Emerson Way	2,000.00		Open			
Work/FA	01-347	LW347	19109 Emerson Way	0.00		Open			
	01-348	LW348	19110 Emerson Way	2,000.00		Sold			
	01-349	LW349	19111 Emerson Way	0.00		Open			
E-Mail:	01-360	LW360	19602 Frost Circle	15,000.00		Open			
	01-361	LW361	19604 Frost Circle	10,000.00		Open			
	01-362	LW362	19606 Frost Circle	10,000.00		Open		R	
	01-363	LW363	19608 Frost Circle	10,000.00		Open			
	01-364	LW364	19610 Frost Circle	15,000.00		Sold			

 Lot #: Show Purchase Date instead of Garage

Contract Notes Tab Added to Lot Inventory

Software Reporting: 5192

Contract Notes tab has been added to Lot Inventory set up.

The Contract Notes tab includes 3 new fields – Legal Description, Lot Contract Notes, and Parcel ID.

The screenshot shows a dialog box titled "Lot will be Added" with three tabs: "General", "Notes", and "Contract Notes". The "Contract Notes" tab is selected and circled in red. It contains three text input fields: "Legal Description:" (empty), "Lot Contract Notes:" (empty), and "Parcel ID:" (containing the text "1112346-312646-133543"). At the bottom of the dialog are "OK" and "Cancel" buttons.

Added New Lot Inventory Fields to Import

Software Reporting: 5168-1

Hide
Restricted
Legal Description
Lot Contract Notes
Parcel ID

Added the Ability to Update Existing Fields via Import

Software Reporting: 5168-2

The significance of this improvement is the ability to update existing fields (and new fields – see SR 5166 and SR 5192) via an import. Where in past versions – a second import would skip records with an existing lot number.

Users can now -

1. Export the existing lot data
2. Update in a spreadsheet
3. Re-import and overwrite CERTAIN fields

Fields allowed to be overwritten:

Address
Garage
Hide (SR5166)
Restricted (SR 5167)
MLS#
Area
Lot Size
Market
Finder
Notes
Legal Description (SR 5192)
Lot Contract Notes (SR 5192)
Parcel ID (SR 5192)

New lot fields added to TxDocument Tokens

Software Reporting: 5193

TxDocument Tokens for the new Lot Inventory fields have been added for use in Sales contracts and other documents.

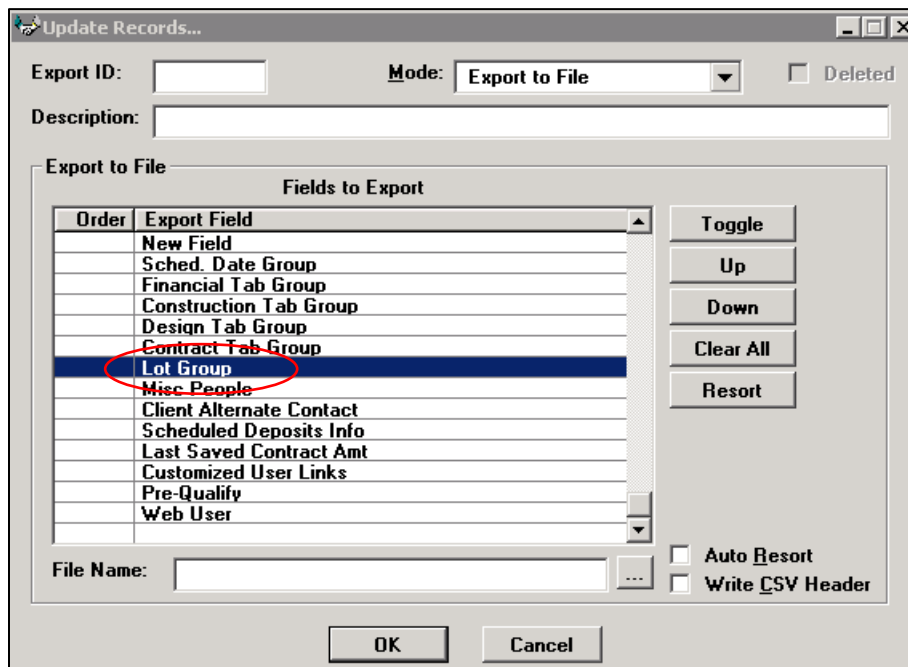
- «LegalDescription»
- «LotContractNotes»
- «ParcelID»
- «LotNotes»

All Lot Fields Export for Client Profile Report

Software Reporting: 5197

All lot fields identified as a LOT GROUP containing ALL of the fields associated with an individual lot record is now available as an exportable field for the Client Profile Report.

Go to REPORTS | CLIENT PROFILE REPORT | EXPORT ID



Expanded Model Description Field on PSClient reports

Software Reporting: 5149

Several PSClient reports have a field for the Model Description, but previously they did not show the entire description. This field has been expanded to include the full contents of the Model Description field.

NOV 21, 2016 09:50PM	Profitable Construction Model Option Price List	Page: 1 of 11
Model:	Model Up Grd 5/4	
	Model Description	
	Model 1 - Bed 5 and Bath 4 are upgrades. Bonus Room converts to Bath 4 and Bedroom 5. Attached 2 bay Garage is an upgrade. Basement option is available. Wood Floors begin at Level 2.	
Option #	Option Description	
Subdivision-Lot		
110	Lot Cost	

Option to hide customers' CURRENT residence on Warranty Requests

Software Reporting: 5165

When NOT checked, the customer's current RESIDENCE will be displayed on the request.
When checked, the customer's current RESIDENCE is NOT displayed on the request.

Go to REPORTS | WARRANTY | WARRANTY REQUEST

The screenshot shows a 'Warranty Request' dialog box with the following fields and options:

- Client: [Text Field]
- Vendor Number: [Text Field]
- # Copies to Print: [Spin Box, value: 1]
- Also Print Homeowner Copy
- Include Already Printed
- Include Done
- Do Not Show Residence Line (highlighted with a red box)
- Warranty Classes to Include:
 - Punch-Out
 - Orientation
 - Warranty
- Buttons: Preview, Print, Send, Cancel



Builder Incubator
PSClient 2017 What's New

Corrected Bug for Lot change with a ZERO premium to Lot with a NON-ZERO Premium

Software Reporting: 5190

If a client was changed to a new lot (after the sales contract was saved) and the starting lot had a premium of zero with a change to a new lot with a non-zero premium, the CONTRACT PRIOR TO ADDENDA and CONTRACT AFTER ADDENDA tokens on the TxDocuments were not working properly.

Corrected Bug in the Exchange of Model Option Costs from Eclare to PSClient

Software Reporting: 5182

PSClient was not exchanging Option Costs from Eclare in specific situations where the Ignore Option Costs was checked ON and the option had a prior zero costs AND a prior non-zero retail value.

Changed the PO Bar Code Scanner configuration and hardware specifications.

Software Report: 5224

The Honeywell bar code scanner (used in PSClient to scan Options and Colors at your design center) has been changed. Detailed instructions for the scanner configuration are in the PSClient\Scanner program folder. Additional assistance is available on our website – Knowledge Base articles (keyword “bar code scanner”).