

Aug-2018
Release: PSClient 2018c
Version: 2018.01.1807.291

Special Option TYPE = E (Elevation)

Software Report: PSC-1

Create a new TYPE of Master Option – to be used for ELEVATIONS. This allows the elevation of a Model/Spec/Client to be reported separately from other master options. This also enables the presentation of ELEVATION in the client list and enables the exchange of the selected elevation to Eclare and Gemini job headers.

The screenshot shows a dialog box titled "Option will be Changed" with the following fields and controls:

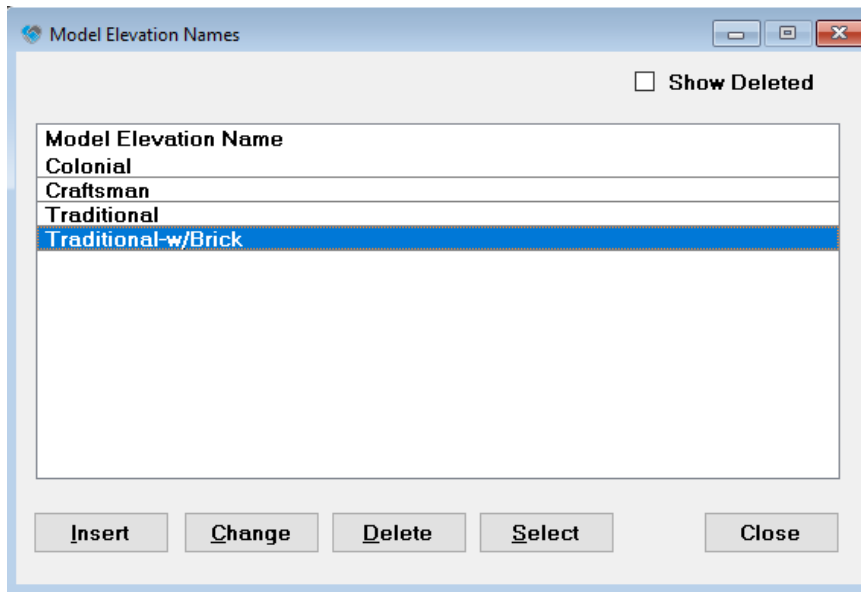
- Option Number: 31100
- Scan Code: M622
- Deleted:
- Option Type: Elevation (dropdown menu)
- Display: (dropdown menu)
- Elevation Number: Elevation 1
- Description: Elevation 1
- Location: Exterior
- Category: Elevation
- Retail Unit Price: 0.00
- Cost Unit Price: 0.00
- Min Markup %: 0.0
- Default Qty: (empty)
- Option Group: ELEVATION
- Print Group: (empty)
- Color Group: (empty)
- Option Deadline: 1
- Schedule Group: (empty)
- Exchange Retail Calculations:
 - Markup %: 0.0
 - Retail Rounding: 0.00
 - Old Retail: 0.00
 - Cost Ignored for Retail Calculations:
- Display/Hide Groups:
 - Master Display/Hide:
 - Display Group: (empty)
 - Hide Group: (empty)
- Print Scanner Label:
- Show Notes on Color Selection Report:
- Internal Notes: (text area)
- Buttons: Assembly List, OK, Cancel

Create Elevation table for Elevation Names

Software Report: PSC-2

Builders often use names for each elevation, as opposed to elevation 1 and elevation 2. However, the estimate of a house generally includes the base elevation (ELV-1 for example) and then the changes to get from ELV-1 to ELV-2. ELV1 may not always be the same “named” elevation in every model. The elevation naming convention allows builders to establish a BASE elevation and subsequent elevations (ELV-2, ELV-3, etc.) and still name each elevation uniquely on every model.

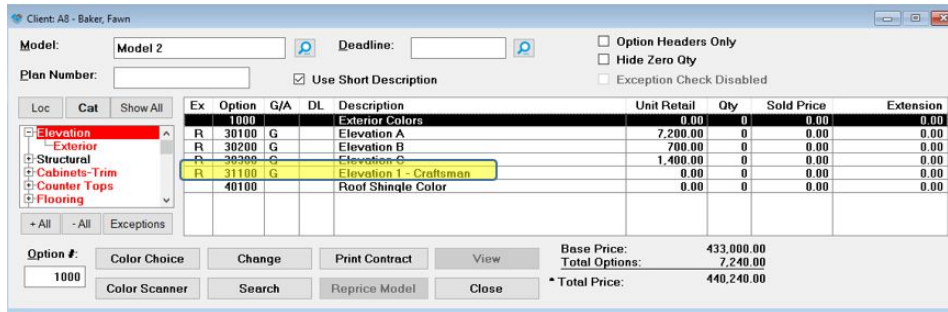
The elevation name is presented on all appropriate reports, screens, contracts and purchase orders to facilitate communication of the named elevation to all parties.



Elevation Name in Model window

Software Report: PSC-2

The Elevation Name presented in the Model window. The example shown below illustrates the new Elevation type (31100 – Elevation 1 – Craftsman) along with the current elevation options. Generally speaking, the current options can be updated (changed to) the new master option TYPE.



Elevation Name in Model Sales Contracts

Software Report: PSC-2

The Elevation name is added to the option in the pricing details. Also, the elevation name is added to the Sales Contract header.



Contract Pricing Detail Sheet

BUYER:	Steve Cook		
SALESPERSON:	Sales Person 1	SUBDIVISION:	Subdivision 1
MODEL NAME:	Model 2 Is a 5 Bedroom / 3 Bath with attached 2 bay garage		LOT #: 01-107
ELEVATION:	Craftsman		
JOB ADDRESS:	10032 Oak Drive		
BASE PRICE OF HOME:			\$ 433,000.00

OPTIONS:

Elevation

31100 [1] Elevation 1 - Craftsman	n/c
------------------------------------	-----

Subdivision-Lot

110 Lot Premium: 01-107 (10032 Oak Drive)	n/c
---	-----

Elevation Name in Model Client Proposal

Software Report: PSC-2

The Elevation Name also appears on the option detail in the Client Proposal

JUN 27,2018

Client Proposal

Page 1 of 1

Builder Incubator Demo Data
 1440 Bayshore Ave
 Miami, FL 33537
 Fax: 305-555-4567
 Phone: 305-555-1234

Steve Cook
12345678

Sales Associate: Sales Person 1
 Realtor: No Realtor
 Subdivision: Subdivision 1
 Lot Number: 01-107

Proposed Home: Model 2

Base Price: \$433,000.00

Model 2 Is a 5 Bedroom / 3 Bath with attached 2 bay garage

Opt #	Qty	Description	Option Extension
110	1	Lot Cost	n/c
110	1	Lot Premium: 01-107 (10032 Oak Drive)	n/c
31100	1	Elevation 1 - Craftsman	n/c
Total Options			n/c
Proposed Total			\$433,000.00

*** PROPOSAL DISCLAIMER ***

Added new TxTokens

Software Report: PSC-2

The TOKEN for the Elevation name has been added to the TxDoc maintenance

Please select token to use

ALL
GENR
CONT
CONS
DESI
FINA
FLAG
OTHR
TXDT
TXW

Contract Related Tokens

Token	Source	Description
EntryCode	CONT	Subdivision Entry Code
ElevationName	CONT	Elevation Name
LotNum	CONT	Lot Number
LotNumSeq1	CONT	Lot Number Seq 1
LotNumSeq2	CONT	Lot Number Seq 2
LotNumSeq3	CONT	Lot Number Seq 3
LotAddress	CONT	Lot Address
LotPremium	CONT	Lot Premium

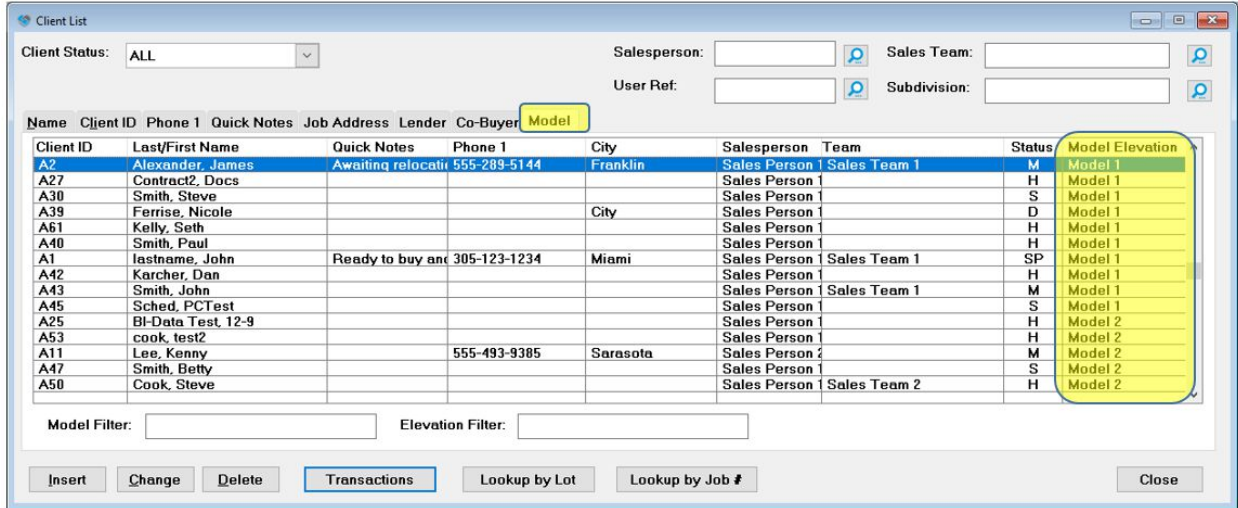
Search:

Export
Select
Cancel

Add new Elevation and Model to the Client List

Software Report: PSC-3

PSC-3 added the Model-Elevation column to the Client list



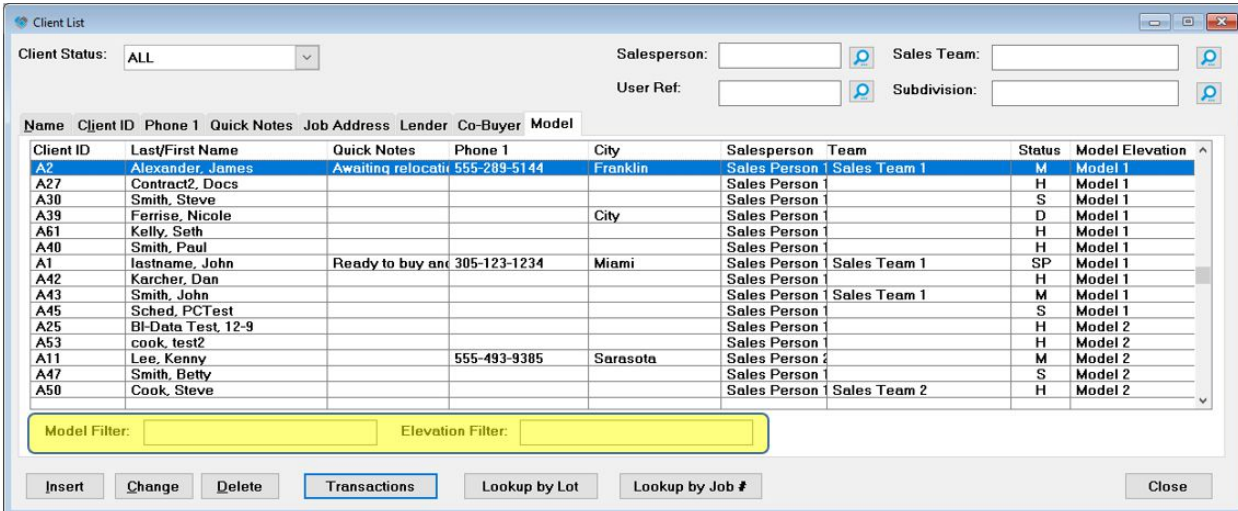
The screenshot shows the 'Client List' window with a table of client records. A new column, 'Model Elevation', has been added to the right of the 'Status' column. The 'Model Elevation' column contains values such as 'Model 1' and 'Model 2'. The 'Model' column header is also highlighted in yellow.

Client ID	Last/First Name	Quick Notes	Phone 1	City	Salesperson	Team	Status	Model Elevation
A2	Alexander, James	Awaiting relocati	555-289-5144	Franklin	Sales Person 1	Sales Team 1	M	Model 1
A27	Contract2, Docs				Sales Person 1		H	Model 1
A30	Smith, Steve				Sales Person 1		S	Model 1
A39	Ferrise, Nicole			City	Sales Person 1		D	Model 1
A61	Kelly, Seth				Sales Person 1		H	Model 1
A40	Smith, Paul				Sales Person 1		H	Model 1
A1	lastname, John	Ready to buy and	305-123-1234	Miami	Sales Person 1	Sales Team 1	SP	Model 1
A42	Karcher, Dan				Sales Person 1		H	Model 1
A43	Smith, John				Sales Person 1	Sales Team 1	M	Model 1
A45	Sched, PCTest				Sales Person 1		S	Model 1
A25	BI-Data Test, 12-9				Sales Person 1		H	Model 2
A53	cook, test2				Sales Person 1		H	Model 2
A11	Lee, Kenny		555-493-9385	Sarasota	Sales Person 2		M	Model 2
A47	Smith, Betty				Sales Person 1		S	Model 2
A50	Cook, Steve				Sales Person 1	Sales Team 2	H	Model 2

Add new FILTER for Elevation and Model to the Client List

Software Report: PSC-12

User can now filter by Model and/or Elevation from the Client list

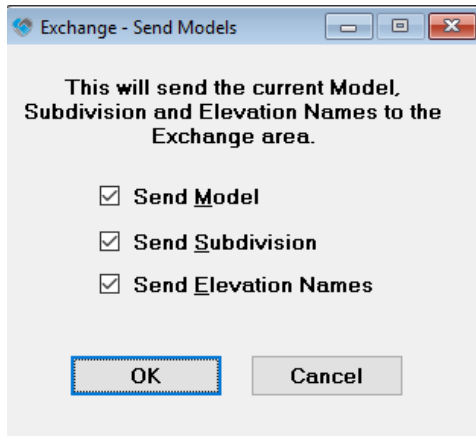


The screenshot shows the 'Client List' window with the same table as above. Below the table, there are two filter input fields: 'Model Filter:' and 'Elevation Filter:'. Both fields are highlighted in yellow.

Exchange of Subdivision-Model-Elevation to ECL

Software Report: PSC-5

FILE | EXCHANGE | Send Model, Subdivision and Elevation Names – this will build the necessary tables in Eclare to allow the assignment of these fields to each Eclare job. Note if names are updated in PSClient they will automatically be updated to all jobs in Eclare – once exchanged.



Lot Master Report – Adjust field width on Lot Report

Software Report: PSC-14

Job Number field needed adjustment to allow for 8 characters (when character width is maximized – as with a “W”).

JUN 25,2018
12:17PM

Builder Incubator Demo Data
Lot Master Report

Page 1 of 1

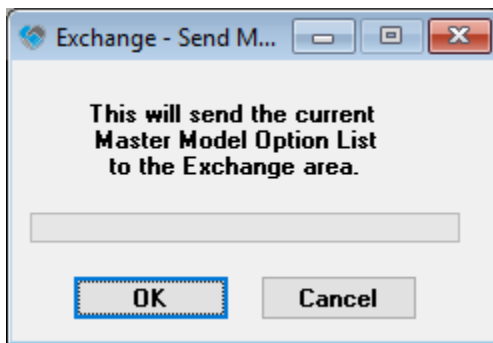
Lot	Garage	Street Address	H R	Status	Job #	Premium	Client
<u>Subdivision: Subdivision 1</u>							
01-100	RH	10025 Oak Drive		Model	WWWWWWW8	23,000.00	
01-101	A	10026 Oak Drive		Open	CP101	0.00	
01-102	RH	10027 Oak Drive		Open	CP102	0.00	
01-103		10028 Oak Drive	H	Open	CP103	0.00	

Feb-2018
 Release: PSClient 2018b
 Version: 2018.01.1802.151

Exchange Option Location and Category from PSClient to Eclare

Software Report: SR5341-5

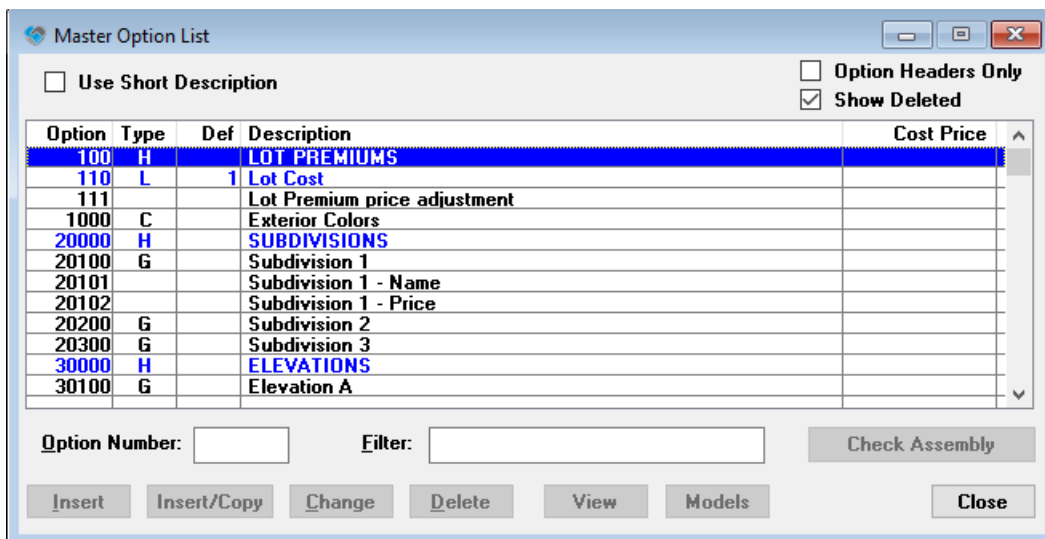
Added the Location and Category fields to the Option Reference List Exchange
 File | Exchange | Send Master Model Options



Correct Security Access Related to Master Options

Software Report: SR5359

The INSERT/COPY menu option was allowed for users that did not have access to the Master Option Maintenance area. INSERT/COPY is now properly restricted.




Builder Incubator
PSClient 2018 What's New

Jan-2018
 Release: PSClient 2018a

PAYCODE on client schedule

Software Report: 5215

Add the PAYCODE to the Schedule Job Detail Report

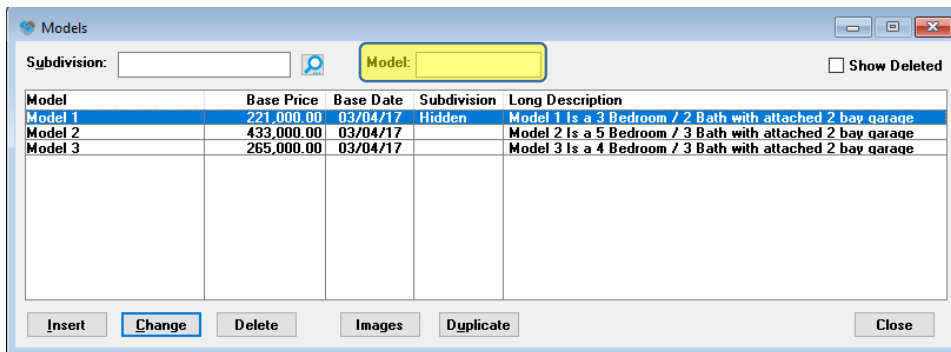
JAN 29,2018 01:50PM Builder Incubator Demo Data Scheduler Job Detail Report A50 - Cook, Steve Page 1 of 35

Sequence	D	Description	Product Group	Vendor Name	*NONE*	W/C M A N S	Days/Var	Start	Complete	Variance	SG
A100	B	Plot Plan	SURVEY			S N N A	2	11/21/17 a	11/22/17 e		
Lag Start Time: 0			Order Lead Days: 0			Deadline Group:		Schedule Group: Mode:			
Predecessors Task ID: Ignore Days Off: No Adj: Reason Code: Mode: Excused Days:											
Client Transactions Type: Pay Code: UOP Trigger: Date Link: Lot Survey Completed To Do By: Link Trigger: Done Only Created: No Const. Stage: Preconstruction											

MODEL filter

Software Report: 5220

Add a Model lookup filter at the Model Maintenance screen



Model	Base Price	Base Date	Subdivision	Long Description
Model 1	221,000.00	03/04/17	Hidden	Model 1 is a 3 Bedroom / 2 Bath with attached 2 bay garage
Model 2	433,000.00	03/04/17		Model 2 is a 5 Bedroom / 3 Bath with attached 2 bay garage
Model 3	265,000.00	03/04/17		Model 3 is a 4 Bedroom / 3 Bath with attached 2 bay garage

TxMaintenance Scrolling

Software Report: 5286-2

Fixed bug related to the Text Editor scrolling and menu display.

Multiple Monitor

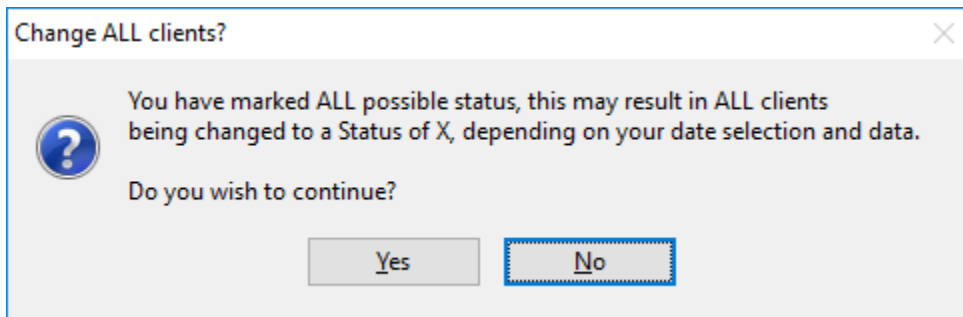
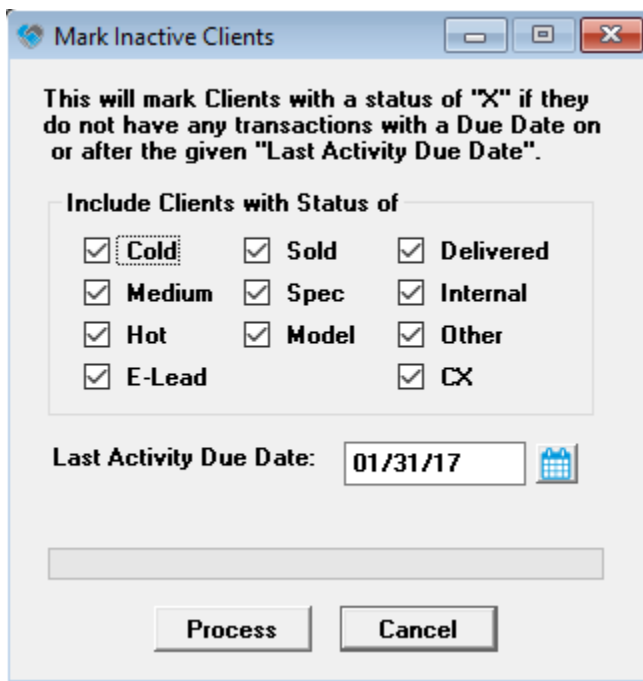
Software Report: 5317

Changed how window positioning is stored for purposes of multiple monitors. In prior versions, when a user is displaying on multiple monitors, certain windows would become “out of focus” and not displayed. The changes made will position each window with a relative frame and allow better control when moving the application window from monitor 1 to monitor 2.

Mark Inactive Clients

Software Report: 5294

Changed logic and message when all client STATUS's are checked to move clients to an INACTIVE status




Builder Incubator
PSClient 2018 What's New

Adjust Font Added to Main Menus

Software Report: 5286

This was expanded from the changes we made in version 2017 to include all the MAIN MENU. We also added a BOLD for each font style selection.

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

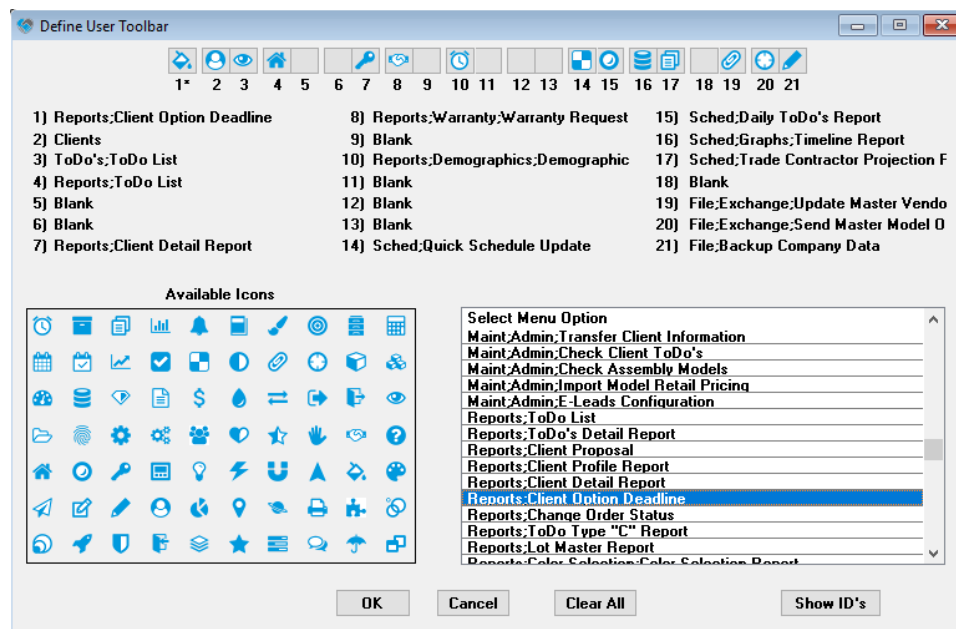
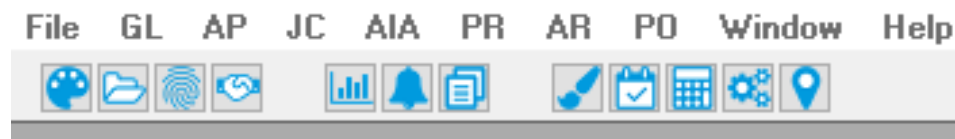
Go to FILE | TERMINAL SETUP | Fonts tab

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

Replaced All Program Icons

Software Report: 5287

Users can assign menu short cuts with the DEFINE USER TOOLBAR. The Icons have been updated to reflect the higher resolution capacity for Windows 10 and future operating systems.



New Report writer tokens

Software Report: 5304

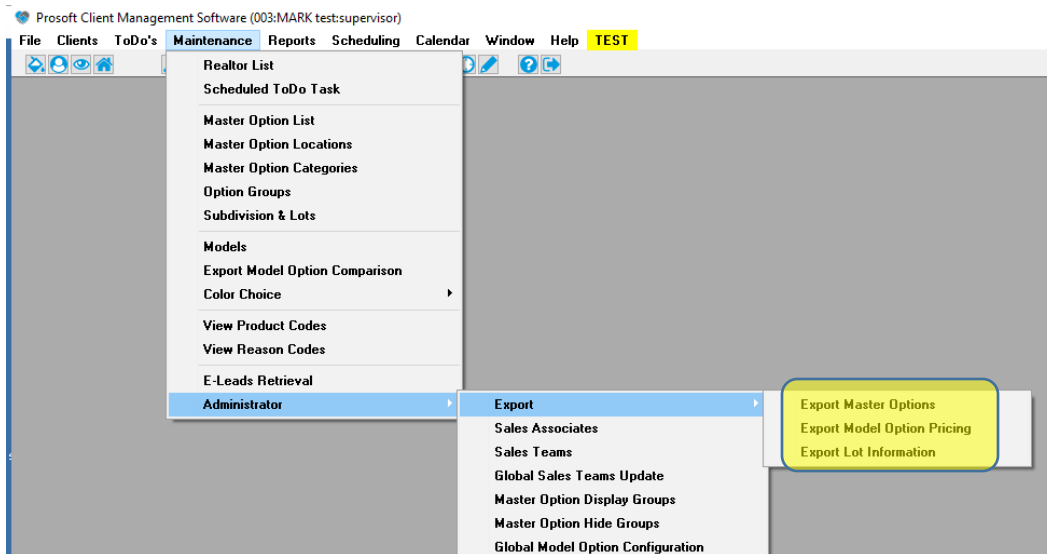
Added a new token to the report writer to calculate the number of days a job has been at a specific stage of construction.

Loan Type Descriptions	CLOANTYP	
Exchange File Gemini-to-PSClient @@@@	EGPWIP	
Others		
GEN:Program General Information <M>	CGENINFO	
Data		
Permanent Lendor Name	LendorPermName	@S40
Construction Lendor Name	LendorConstName	@S40
Total Deposit for Client excluding C/O	TotalDepositClient	@N-14.2
Total C/O Deposits	TotalDepositCO	@n-15.2
Stage Days	StageDays	@N6
Functions		
Returns User Calendar Initials from CUSRINFO	FirstOfMonth(MonthOffset)	
Returns Date of last day of month	EndOfMonth(MonthOffset)	
Returns Date of first of year (Jan 1)	FirstOfYearYearOffset	

Export Function no longer Supervisor

Software Report: 5306

To make exporting data easier – we moved all the PSClient export menu options out of the Supervisor menu.



Lot Master Report – show new tabs

Software Report: 5309

When PRINT CONTRACT NOTES is checked the Report would add a new row for each Legal Description, Lot Contract Notes, Parcel ID positioned under the current lot record.

Lot Master Report

Subdivision: Subdivision 1

Phase

Status: ALL

Subtotal by: Subdivision only

Start New Page on: None

- Print Client Name
- Print Additional Detail
- Show Purchase Date instead of Garage
- Print Lot Notes
- Print Contract Tab Notes
- Hide Lot Premium on Report
- Show Hidden
- Show Restricted

Preview Print Cancel