

PSClient 2021

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Released Dec-2020 Release: PSClient 2021a Version: 2021.01.2012.011

Client ID exceeds 99,9999

Software Report: PSC-89

Updated the field length with proper padding to accommodate clients into 999,9999. This change also included the Client Doc folder creation for the GDrive Doc Management.

Added a LOCK checked box to user fields

Software Report: PSC-87

A checkbox has been added that will LOCK down the PSC-user fields on the Construction tab. This will prevent a user from accidentally un assigning a SUPERINTENDENT to a client job. The lookup / selection will always work. However, "backspacing or deleting" will only work when the ALLOW ACCESS is checked on.

Client - Departn	nent								- 0	
ID: A28	Last Name: (Clark	Fin	st Name: Pete	ar i		Status:	Sold	1	~
Construction C	onstruction Dates	Construction Entry	Design	Design Entry	Finance	Finance 2	Finance D	ates	Finance En	itry
Superintenden	d: DAVE	ρ	Constructi	ion Coordin:		P		Acti	ve Schedu	le
Estimator:		P	Project M	anager:		2	0	Allo	w Access	L
Job Address:										
Const. Stage:				P						
Permit Reques	ited:				Promis	ed Date:				m
Permit Receiv	ed:	6			Notice	of Commen	cement			**
Permit Number					Constr	uction Start	: F			m
Permit PIN:					Orient	ation:	Γ			m
					Certifi	ate of Occ	apancy:			m
				Close						

MAIL LIST added alpha sort

Software Report: PSC-86

Added a sort column to the MAILPS - MAIL LIST

For builders making extensive use of the MAIL LIST having the List Name sorted based on List Name makes locating the correct email group much easier.

😂 Email List							
List Name	Addresses						
!ABC	Mike@123.com						
!Bay	email1@iscm.us,email2@iscm.ue,email3@iscm.ue						
!charile	email@iscm.us						
!PSC&Son	Email1@test.com,Email2@test.com						
!wan	email@iscm.us						
!wen	email1@iscm.us						
!zed	emai@iscm.us						
Insert Change	Delete Close						



Added the FILTER by header and the SEARCH filter to the Master Option - assembly Software Report: PSC-85

When selecting individual OPTIONS to include in an ASSEMBLY – added the following

- Option Number lookup
- Header Collapse and Expand via double click
- Filter based on text

I Option Assembly List	Select option to add to assembly	
Number Option Description	Items in blue are not valid choices.	Option Headers Only
	Option Description 100 LOI EREMUNS 111 Lot Provide Mutual State 111 Lot Provide State 1110 Pool State	Select Cancel
Insert Delete	Done	

Job Number, Job Address and Lot Number added to the Client List

Software Report: PSC-81

Sort by TAB

Lookup field with IN-String filter

🧐 Client List											×
Client Status:	ALL					Salesperso	n:	🔎 Sales	Team:		Q
						User Ref:		🔎 Subdi	ivision:		Q
<u>Name</u> C <u>li</u> ent	ID Phone 1 Quick Notes		o-Buyer Model Jo	b # Lot # Addre							
Client ID	Last/First Name	Quick Notes	Phone 1	City	Salesperson	Team Statu	is Model Elevation	Job #	Lot #	Address	
A7	Foster, Eddie		813-747-9965	Baltimore	Darrel William		Alafia - ASG	ASG101	01-101	1549 Northgate	
A3	Williams, Ernie			Baltimore	Darrel William	S	Alafia - ECR	ECR101	02-101	1682 Stonewood Rd	
Job Number: 101											
Insert	<u>C</u> hange <u>D</u> elete	Transactions Loo	okup by Lot Lo	ookup by Job #						Close	•



Exclude subdivisions in export if deleted

Software Report: PSC-73

Added a check box to exclude subdivisions that are marked as deleted when exporting the LOT inventory data.

🧐 Export Lot Inven	tory	
	This will export Lot Inventory list.	
	Exclude Deleted Subdvisions	
Export Filename:		
	Export Cancel	

Client List MODEL lookup – changed to use a CONTAINS filter

Software Report: PSC-88

Changed the MODEL lookup to filter if a Model Name "contains" these characters

-	Client List								- • ×			
с	lient Status:	ALL			Salesperson:		2	Sales Team:	2			
					User Ref:		P	Subdivision:	Q			
J	Name Client ID Phone 1 Quick Notes Job Address Lender Co-Buyer Model											
	Client ID	Last/First Name	City	Status	Model Elevation	Job #	Lot #	Job Address				
	A3	Williams, Ernie	Baltimore	S	Alafia - ECR	ECR101		1682 Stonewood Rd				
	A18	Hayes, Tina	Baltimore	S	Alafia - ECR	ECR103		1686 Stonewood Rd				
	A2	Johnson, Alan	Baltimore	S	Dresdin - ECR	ECR100	02-100	1680 Stonewood Rd				
	Model Filter: Elevation Filter:											
[Insert Change Delete Transactions Lookup by Lot Lookup by Job #											