



## Analyzer Release Notes v 5.1.0

(Release date September 2019)

**Date:** March 20<sup>th</sup>, 2020

**Applicable to:** informXL Analyzer v 5.1 and higher

<b>Minimum Requirements</b>
<ul style="list-style-type: none"> <li>• Microsoft Office 365, Office 2019, Office 2016</li> <li>• Constellation NEWSTAR v2019.1.00 or higher</li> </ul>

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## informXL Ribbon – New and Improved

informXL

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It's been 10 years since the informXL analyzers were introduced, and the informXL ribbon was due for a makeover. The updates we made were designed to enhance your informXL experience. Some of the highlights include:

- Parameters have been relocated to the ribbon
- Date parameters now have a date picker
- "Get Data" directly from the ribbon
- Direct links to both Support and YouTube

## Accounts Payable

<b>Upgrade</b>	New parameter: Allow the ability to run by: "Unpaid/Open Only" (not in legacy)
<b>Upgrade</b>	Parameter "AP Cat" is now multi select.
<b>Upgrade</b>	New field additions: "Item Retention Due", "Discount Amounts", "Company Short Name"
<b>Upgrade</b>	AP Header Bank Code is now included in "Payment Details".
<b>Fix</b>	Filtered out recurring invoices from the results set.

## Bid Rates *(NEW analyzer)!*

**Upgrade** This new analyzer is intended to provide detailed information pertaining to NEWSTAR Bid Rates. With this analyzer you can analyze and export supplier bid rates, bid rate pricing, bid rate pricing history, and general takeoff data quickly and efficiently. Common uses include:

- Supplier bid rate price trending reports
- Compare bid rate prices across multiple suppliers
- Use as a tool for bid rate and takeoff cleansing
- General bid rate audit and analysis



Overview Training Video: [link to video](#)

## Check Details

<b>Upgrade</b>	New field addition: "Item Discount Amount", "Company Short Name".
<b>Fix</b>	Check groups created through the EFT program now show as reconciled.
<b>Fix</b>	Field "Account Code (pmt)" now correctly reflects the payment account.
<b>Fix</b>	Updated the logic to look for Joint Name at the Check header first, then the Invoice Header to populate.

## GL Balance

<b>Upgrade</b>	New field additions: "Sub-Ledger Name", "Journal Code", "Source", "Company Short Name".
<b>Upgrade</b>	Replaced pivot table "Pivot - P&L and Bal Sheet" with pivot table "Pivot - P&L by Month".

## Job Cost Details

<b>Upgrade</b>	New field additions: "Trade Code", "Trade Group", "Company Short Name".
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## Job Scrub

<b>Upgrade</b>	New field addition: "AIA Code".
<b>Upgrade</b>	Exclude PO's that have not been "Approved", or "Rejected".
<b>Upgrade</b>	Added subtotals at the Summary line type for fields "Retention" and "Retention Balance".
<b>Fix</b>	Adjusted logic for VPO transactions from OnLocation to take the midnight datetime into account to populate with the correct date.

## Lot Details

<b>Upgrade</b>	New field addition: "History" to designate history lots.
<b>Fix</b>	Summarize multiple Lot Premiums, this resolves line duplication.

## Lot Options

<b>Fix</b>	Blank customers no longer returned when a customer name is typed into the parameter "Customer (contains)"
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## Model Estimate

<b>Fix</b>	Field: "Model + Elev" Excel formula replaced field now populates programmatically.
<b>Fix</b>	When Bid Rate taxes are NULL the calculated rate (Tax In) showing 0.
<b>Fix</b>	Model Estimate is pulling in craft estimate if a Subcontract, Part, or Bid Rate exists. This has been fixed.
<b>Fix</b>	Now calculates the Calculated Estimate amounts correctly for Model Subcontracts when "Include in Contract" is checked for taxes.

## Parts

<b>Fix</b>	Adjusted logic to ensure Primary Supplier is pulling by correctly.
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PO Details	
<b>Upgrade</b>	New field addition: "Warranty WO". The field pulls from the PO Header in PO and VPO Maintenance when a PO is created through the Warranty module.
<b>Upgrade</b>	Draw descriptions removed from the PO Item Description field as the draw fields are already in the analyzer.
<b>Upgrade</b>	Exclude PO's that have not been "Approved", or "Rejected".
<b>Fix</b>	Updated the condition formatting to identify Partial Pay PO's.
<b>Fix</b>	VPO transactions are now populating with the time element for OnLocation. Current day VPO records are not showing up because end date time element is set to midnight and using between operator.

Sales Summary NSE	
<b>Upgrade</b>	Updated the logic for the fields "Deposits Paid to Date" and "Next Deposit Amt Due" to reflect postdated check entries.
<b>Upgrade</b>	Updated the "Options (Drilldown)" to include the following field additions: "Incentives", "Room Code", "Room Description".
<b>Fix</b>	Loan Officer field is now populating correctly.

Sales Summary NSS	
<b>Upgrade</b>	Updated the logic for the fields "Deposits Paid To Date" and "Next Deposit Amt Due" to reflect postdated check entries.
<b>Upgrade</b>	Updated the "Options (Drilldown)" to include the following field additions: "Incentives", "Room Code", "Room Description".
<b>Upgrade</b>	Added new criteria (Model Constraint) to allow report to pull in inventory records that have no model(plan) associated with it.
<b>Upgrade</b>	New drilldown field: "Contacts (Drill Down)" – includes buyer contact information.
<b>Upgrade</b>	New drilldown field: "Deposits (Drill Down)" – includes detailed deposit information.
<b>Upgrade</b>	Updated the logic for the fields "Lot Premium" and "Lot Price" to also look at the "Override" price fields.
<b>Fix</b>	Option discounts were not being deducted from the [Net sale] amount for Spec and Model Homes. This has been corrected.
<b>Fix</b>	Option Discounts for Models and Spec homes were not populating in the in the Options (Drill Down). This has been corrected.
<b>Fix</b>	Sales Tax amounts on approved buyer options were showing up as an unapproved option amount.
<b>Fix</b>	Cancelled homes were doubling up when there were multiple canceled records on the same Buyer Selection record. This has been corrected.
<b>Fix</b>	After the "Actual Date Closed" is populated the "Net Sales" amount will be calculated using the "Option Incentives (applied)" instead of "Option Incentives (allowed)".

## Start Scrub

<b>Upgrade</b>	New product revenue field additions: "Gross Sale", "Discount", "Incentive", "Tax", "Net Sale".
<b>Upgrade</b>	New product level field addition: "SqFt".
<b>Upgrade</b>	New pivot table: "Pivot - Margin by Product"
<b>Fix</b>	When the "included in contract" box in the Model subcontract is selected the system will reduce the subcontract unit price of the product by the applicable tax amount. The applicable tax will then be added separately to the purchase order.

## Suppliers

<b>Upgrade</b>	New field additions: "Trade Code", "Trade Group".
<b>Fix</b>	Supplier UDF's were not pulling into the analyzer when Include UDF's was selected. This has been corrected.

## Takeoff Margin

<b>Upgrade</b>	New parameter: "Include Discontinued Models" parameter, allow the ability to include discontinued models into the analyzer.
<b>Upgrade</b>	New field additions: "Category Code", "Subcategory Code".
<b>Fix</b>	Non-Parts crafts with parts still attached are duplicating. This has been corrected.
<b>Fix</b>	Discontinued and non-kit products were causing duplicate lines with Kit Products. This has been corrected.
<b>Fix</b>	Kit products with a mix of model-specific and global products are not being returned correct or consistently. This has been corrected.
<b>Fix</b>	Orphaned sales pricing records have been removed from the analyzer results.
<b>Fix</b>	If a Part occurs more than once in a takeoff suppicate headers were created. This has been corrected.
<b>Fix</b>	Field "Total Tax Included" was not being calculated correctly for Bid Rates. This has been corrected.
<b>Fix</b>	When the "included in contract" box in the Model subcontract is selected the system will reduce the subcontract unit price of the product by the applicable tax amount. The applicable tax will then be added separately to the purchase order.

## Warranty Details

<b>Upgrade</b>	New field addition: "Print Status".
<b>Upgrade</b>	Added a Warranty Dashboard to support visualization of warranty tickets.
<b>Fix</b>	"Option (Drill Down)" field will only show a value if the lot has options selected.