Analyzer Release Notes v 5.1
Date: March 20th, 2020
Applicable to: informXL Analyzer v 5.1 and higher

Minimum Requirements

- Microsoft Office 365, Office 2019, Office 2016
- Constellation NEWSTAR v2019.1.00 or higher

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informXL Ribbon – New and Improved

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

Upgrade	New parameter: Allow the ability to run by: "Unpaid/Open Only" (not in legacy)
Upgrade	Parameter "AP Cat" is now multi select.
Upgrade	New field additions: "Item Retention Due", "Discount Amounts", "Company Short Name"
Upgrade	AP Header Bank Code is now included in "Payment Details".
Fix	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 YouTube **Overview Training Video:** link to video

Check Details

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

GL Balance

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

Job Cost Details

Upgrade	New field additions: “Trade Code”, “Trade Group”, “Company Short Name”.

Job Scrub

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

Lot Details

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

Lot Options

Fix	Blank customers no longer returned when a customer name is typed into the parameter “Customer (contains)”

Model Estimate

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

Parts

Fix	Adjusted logic to ensure Primary Supplier is pulling by correctly.

PO Details

Upgrade	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.
Upgrade	Draw descriptions removed from the PO Item Description field as the draw fields are already in the analyzer.
Upgrade	Exclude PO's that have not been "Approved", or "Rejected".
Fix	Updated the condition formatting to identify Partial Pay PO's.
Fix	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

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

Sales Summary NSS

Upgrade	Updated the logic for the fields "Deposits Paid To Date" and "Next Deposit Amt Due" to reflect postdated check entries.
Upgrade	Updated the "Options (Drilldown)" to include the following field additions: "Incentives", "Room Code", "Room Description".
Upgrade	Added new criteria (Model Constraint) to allow report to pull in inventory records that have no model(plan) associated with it.
Upgrade	New drilldown field: "Contacts (Drill Down)" – includes buyer contact information.
Upgrade	New drilldown field: "Deposits (Drill Down)" – includes detailed deposit information.
Upgrade	Updated the logic for the fields "Lot Premium" and "Lot Price" to also look at the "Override" price fields.
Fix	Option discounts were not being deducted from the [Net sale] amount for Spec and Model Homes. This has been corrected.
Fix	Option Discounts for Models and Spec homes were not populating in the in the Options (Drill Down). This has been corrected.
Fix	Sales Tax amounts on approved buyer options were showing up as an unapproved option amount.
Fix	Cancelled homes were doubling up when there were multiple canceled records on the same Buyer Selection record. This has been corrected.
Fix	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	
Upgrade	New product revenue field additions: “Gross Sale”, “Discount”, “Incentive”, “Tax”, “Net Sale”.
Upgrade	New product level field addition: “SqFt”.
Upgrade	New pivot table: “Pivot - Margin by Product”
Fix	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	
Upgrade	New field additions: “Trade Code”, “Trade Group”.
Fix	Supplier UDF's were not pulling into the analyzer when Include UDF's was selected. This has been corrected.

Takeoff Margin	
Upgrade	New parameter: “Include Discontinued Models” parameter, allow the ability to include discontinued models into the analyzer.
Upgrade	New field additions: “Category Code”, “Subcategory Code”.
Fix	Non-Parts crafts with parts still attached are duplicating. This has been corrected.
Fix	Discontinued and non-kit products were causing duplicate lines with Kit Products. This has been corrected.
Fix	Kit products with a mix of model-specific and global products are not being returned correct or consistently. This has been corrected.
Fix	Orphaned sales pricing records have been removed from the analyzer results.
Fix	If a Part occurs more than once in a takeoff supplicate headers were created. This has been corrected.
Fix	Field “Total Tax Included” was not being calculated correctly for Bid Rates. This has been corrected.
Fix	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	
Upgrade	New field addition: “Print Status”.
Upgrade	Added a Warranty Dashboard to support visualization of warranty tickets.
Fix	“Option (Drill Down)” field will only show a value if the lot has options selected.