



# Custom Proposal System

**Perfect for Designers and Installers of:**

- **Audio and Video Systems**
- **Home Theaters**
- **Automation Systems**
- **Lighting Systems**
- **Security Systems**
- **Computer Systems**
- **Residential & Commercial Installations**

**Windows and Macintosh Workgroups**

***Business Made More Efficient Through Smartware Technology***

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The magic behind how Horizon Software products can increase your profits is all in the technology we offer. We call it SMARTWARE – because it's easy to use, flexible and intelligent.

Over 20 years of real world experience in the systems integration industry served as the proving ground for these Horizon Software products; program upgrades and continual improvements have made the Custom Proposal System the best selling software of its kind.

Through the use of very powerful modules created specifically for the systems integration market, information is more readily available for just about any task you need to track or complete. Each module is mouse-driven which means you can increase your profits and improve your company's image virtually without touching the keyboard – just point and click! You'll have more time to go after more business and service the ones you have more efficiently.

Why not take a few minutes now to learn more about the program preferred by systems integrators the world over. You'll see that managing all the short- and long-term aspects of your business is as easy as clicking your mouse.

Jim Engandela  
President/Developer

## Benefits and Advantages

- **Improve your company image in the marketplace**
  - **Increase your close ratio, margins and profits**
  - **Improve customer and contractor relationships**
  - **Organize, manage and track multiple projects**
  - **Efficiently allocate your installation resources**
- **Standardize your inventory, purchasing and invoicing**
  - **Save time, save money and reduce stress**

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# Proposals

## The Power to Go Beyond the Ordinary

Great looking proposals and quotes. You have to write them. Yet you have to be able to create them quickly ...easily...professionally. After all, you've got a business to run.

Custom Proposal System makes bid, proposal and quote generation fast and easy. So easy you can do it all with just a few clicks of your mouse.

Custom Proposal System will help you efficiently manage and keep track of all your installations. And because the program uses SMARTWARE Technology, even change orders are handled quickly and automatically. Imagine a program intelligent enough to avoid costly errors. Custom Proposal System does it. As you make a customer's change order, Custom Proposal System instantly displays the changes made, generates a reconciliation report and updates the job cost.

This user-friendly management tool also allows you to produce professional-looking documents that help you stand out from your competitors. While Custom Proposal System comes loaded with 10 predefined proposal styles, this powerful program is fully customizable. Even if you have data in another program, Custom Proposal System can easily import that information for you.

Create multi-disciplined proposals organized by zones, areas and rooms, complete with text descriptions for each area and product. Client information, products and text descriptions are automatically drawn into the proposal from pick lists. Automatic proposal numbering with assignable version numbers. Proposals and areas can be easily duplicated or modified. Complete project job costing with automatic installation labor estimating. Assignable installation phases which allows proposal areas and products to be printed by phase. Displays customer changes and prints changes and prints change orders.

## Key Features

- **Automatic Proposal Creation**
- **Automatic Pricing Calculation**
- **Automatic Labor Calculation**
- **Automatic Payment Plans**
- **Automatic Design Descriptions**
- **Multiple Zones & Install Phases**

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## **Easy proposal creation**

- Fast, flexible and accurate
- Point & click - step by step proposal creation
- Organize proposals by disciplines, zones, areas and products
- Pick areas, products and text from libraries
- Create proposal templates of standardized systems
- Duplicate proposals with different versions for your client
- Proposals are automatically and sequentially numbered
- Proposals can be easily moved between computers
- Archive proposals for permanent storage

## **Completely modifiable proposals**

- Add/delete/modify, zones, areas, products and misc. parts
- Show products with make, model, category, description & finish
- Show products with features and benefit text descriptions
- Automatically computes client payment schedules and amounts
- Organize proposal by installation phase & products for each phase
- Print proposals with or without tax, list prices and discounts
- Sort and print reports on all proposal data

## **Project Estimating & Job Costing**

- Automatically set prices by proposal, product, category or area
- Set prices based on percentage of cost, profit margin or discount
- Automatically computes labor charges and installation time
- Automatically calculates tax including GST/PST & multiple tax rates
- Computes extended warranty and maintenance service contracts
- Automatically computes salesman and installers commissions
- Analyze proposal & product cost, selling price, list price & profit
- Analyze labor cost, selling price, list price & profit

## **Fully customizable color proposals**

- Easily print complete proposals with different pricing configurations
- Proposal Cover Page includes a company introduction & logo
- Area & Product section includes room text descriptions & products
- Contract includes project details, terms and client signature
- Proposals can be completely modified to suit your company style



# Project Manager

The Power to Succeed

It's 4:30 p.m. A major project you've bid on has finally come through. Perfect. Except that the original completion date was 45 days; the customer needs the job done in half that time. How can you be sure you have all the parts needed? Can you coordinate staff schedules to handle this and your other jobs?

Relax. With the Custom Proposal System's Project Tracker module you'll be able to quickly and efficiently allocate your labor and material resources while managing dozens of installations with ease. . . and a click of your mouse.

Project Tracker takes each project and tracks a proposal's due date, the due date of each job phase, what payments have been made and when they were made, and what products have been installed, ordered or on back order for every phase of each job.

With Project Tracker, each installation is assigned tasks, and a daily work schedule can be printed. Aspects of each job are displayed for efficient early preparation. Users then have the option to generate reports, chronologically or by project phase. Used with HORIZON SOFTWARE's GraphicsDraw! module, calendars, graphing and Gant charts can also be easily generated.

## Key Features

- **Project Management**
- **Task Management**
- **Timeline Management**
- **Installers Work Orders**
- **Project Job Costing**
- **Service & Change Orders**
- **Quality Control Reports**
- **Reconciliation Reports**
- **Automatic Purchase Orders**
- **Built-in Consultation Form**

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## **Customizable Reports**

- Dozens of reports at the click of a button
- Reports are created automatically from proposals
- Client interview, consultation & design form
- Project job costing reports
- Automatic purchase orders by vendor for each project
- Product specification sheets including size, weight, finish & power
- Warehouse product staging forms & stickers
- Sales invoices for delivered and installed products

## **Project Tracker**

- Project tracking report enables you to review and update all projects
- Keeps track of install dates, payments, letters sent, install notes, etc.
- Timeline report shows all install phases chronologically by project
- Project percentage of completion report
- Keep track what's on order, in stock, installed & left to install

## **Installation Work orders**

- Shows what gets installed, where & how long it should take to install
- Keeps track of installation hours by product and room
- Installation quality control report reduces overlooked details

## **Change orders**

- Add/Delete/Change products and labor with accountability
- Prints change orders for client to sign
- Project reconciliation report shows an audit trail of all changes

## **Task manager**

- Assign employee tasks for projects and clients
- Tasks include activity type, date, time and priority
- Print a report of tasks for each day, week or month
- Task reports include client information for easy completion



# Contact Manager

The Power to Get More From Your Business

The phone rings. A referral for the project of a lifetime comes in. To get it, all you have to do is remember the details of the call, write sales and follow-up letters, coordinate appointments and meetings, and stay on top of every task that needs to be completed by this afternoon – all while you develop your proposal.

Relax. Horizon Smartware's Contact Manager can handle it.

Contact Manager is a full-featured contact manager created specifically for systems integrators to use in a variety of business situations. Now, communicating with your clients or prospects has never been quicker or more convenient: You can select a pre-written sales letter, customize it and fax it by the time your coffee is finished brewing!

Among the letters you can choose from: Introduction Letters, Proposal Follow-up Letters, Acceptance Letters, Rejection Letters, Phase Completion Letters, Project Completion Letters, Letters to Contractors, After Sales Letters, Delinquent Payment Letters, New Customer Letters . . . and more.

Assign such tasks as calls, meetings, installs, etc., to contacts with 'things to do' reports printed for any time period.

Automatically send follow-up letters to clients and other subcontractors to make a lasting impressions that help build your business through client referrals.

## Key Features

- **Contact Manager**
- **Task Manager**
- **Automatic Follow-up Letters**
- **Automatic Letter/Fax Merging**
- **Integrated Word Processor**
- **Built-in Spell Checker**
- **Referral Bonus Certificates**

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## **Full featured contact manager**

- Multiple ways to categorize contacts for finding and printing groups
- Multiple names for each contact
- Multiple addresses for each contact
- Multiple phone numbers for each contact
- Web site and email addresses
- Notes with date & time stamp
- Create tasks for each contactor project
- Tasks contain activity, date, time and priority
- Create timed billing transactions for contacts
- 30 user definable fields for general information
- Letter writer with mail merging and spelling checker
- Fax writer with mail merging and spelling checker
- Label & envelope printer with mail merging
- Print reports for easy reference
- Follow-Up & Referral System
- Improve your client relations with follow-up letters

## **Client Letters**

- Consultation letter
- Post Proposal letter
- Proposal Acceptance letter
- Rejection letter
- In progress billing letter
- Salesman thank you letter
- Presidents thank you letter
- Contractor letters
- Contractor letters
- Improve your contractor relations with follow up letters to;
- Architect, Builder, Electrician, Decorator, Cabinet Maker
- Referral bonus letters and certificates
- Increase your business by rewarding clients for referring prospects
- Certificates for contractors and clients
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## Point of Sale

The Power to Organize

Your best customer walks into your store for a quick repair. How do you prepare a service invoice while he's waiting?

Relax. You've got POS INVOICER at your fingertips.

Sales invoices, quotations, service orders and purchase orders can be quickly created for front counter or field use.. Simple enough to help you quickly produce service invoices on the spot, and advanced enough to track, retrieve and modify your existing invoices quickly and easily.

POS Invoicer also allows you to quickly draw from HORIZON SOFTWARE's Product Library and Contact Manager from any related sales or service information in seconds . . . and all with a few clicks of your mouse.

## Key Features

### **Creates Quotations**

- **Creates Sales Invoices**
- **Creates Purchase Orders**
- **Creates Service Orders**

## Invoices

- Easily pick clients and products from library to create quick quotes
- Create sales invoices and keep track of payments.
- Easily pick clients and products from library to create sales invoices
- Automatically convert quick quotes into sales invoices
- Create Service Orders & Work Orders to send to support your clients
- Easily create service orders that define work to be performed
- Work orders automatically turn into invoices
- Create Purchase Orders by manufacturer
- Create and track purchase orders independently of proposals

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# Product Library

The Power of Knowing

A builder needs product specs for a customer. What do you do?

That's easy. With Product Library, products can be classified by department, category, make and model. Product descriptions can have short or long features and benefits text. Product sets can also be created for a group of products. Product specifications such as dimension, finish, electrical requirements and warranty can be stored and given to architects, electricians and cabinet makers. Products can easily be drawn into a proposal from pick lists by clicking on your mouse.

## Key Features

- Automatic Product Pricing**
- Stores Product Pictures**
- Product Specifications Report**
- Cost and Consumer Price Books**
- Import Products from other Applications**

## Product Library

- Store an unlimited number of products
- Comes with 50 product manufactures
- Easy to add new products with minimal data entry
- Automatically transfer products from any bookkeeping system
- Full importing and exporting with field mapping
- Find & sort products based on any criteria
- Print product price books by make or product category
- View products by line list, detail list and full detail
- Pricing calculator automatically sets loaded cost and selling price
- Globally update product cost and selling prices by vendor
- Details stored with each product can include;
  - Make, Model, SKU number, Department, Category, Description, Product location, Supplier, Features & Benefits, Associated parts, Tax status, Unit cost, Loaded cost, Selling price, List Price, Installation Time, Finish, Weight, AC power consumption, DC power consumption, Rack spaces, Dimensions, Warranty, Installation notes, Product picture.

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## **Product Sets Library**

- Create product sets that group products into packages
- Products sets can be easily added to any proposal
- Product sets are automatically updated when product prices change

## **Text Library**

- Create paragraphs of text to describe product, or installation designs
- Text can be easily added to any proposal by pointing & clicking
- Built in spelling checker and text formatting ruler

## **Letter Library**

- Stores letters for use with the Contact mail and fax merging
- Stores letters created on the fly in the Contact mail merging
- Built in spelling checker and text formatting ruler

## **Info Library**

- Stores general information for installations, programming etc.
- Easily find and print information based on any criteria
- Built in spelling checker and text formatting ruler

## **Text Library**

- Stores Product Descriptions
- Stores Design Descriptions
- Import Text from Other Applications



## Graphics Draw!

The Power to Create

Automatically create stunning presentations, charts, diagrams and schematics, and instantly place them into your HORIZON SOFTWARE documents and multimedia formats!

GraphicsDraw! is HORIZON SOFTWARE's powerful, new graphics and presentation program created specifically for the systems integrator. And, because it's from HORIZON SOFTWARE, it's mouse-driven and easy-to-use.

Personalize graphics down to the last detail using the integrated drawing tools and an extensive clip art library of high-impact artwork – simply by dragging and dropping into position.

Simply point and click to chart the steps of any process – flow, network, brainstorm, decision-tree, transportation – for a connection that's easy to follow.

Automatically integrate any chart or graph into Custom Proposal System documents! Then present your proposal or document to your customer as a report, GANT chart, dramatic flow chart or even a full multimedia presentation.

Use with HORIZON SOFTWARE's Project Tracker module to turn reports and formats into a calendar with dates and details of what tasks need to be accomplished by which dates.

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## Key Features

Flow Charts  
Schematic Diagrams  
Floorplan Layouts  
Racks & Cabinets  
Organizational Charts  
Calendars  
Timelines  
Outlines  
Network Diagrams  
Data Charts and Graphs  
Tables and Spreadsheets  
Multimedia Presentations  
User-customizable

## Easy to use drawing tools

- Drag and drop placement of pictures
- Graphic Libraries store all your product pictures
- Complete drawing tools with full color and shading
- Automatic proposal diagrams
- Full color diagrams of proposal areas & products

## Blueprint floor plan layouts

- Draw, scan or import floor plans
- Drag & drop CEDIA symbols and product icons into rooms
- Draw and label interconnecting wires

Product flow charts and wiring diagrams

- Drag & drop products from graphics libraries
- Connect products with labeled interconnects and wiring

Supplied with 130 CEDIA symbols

- Audio Video library - Automation library - Lighting library - Communications library Control library - HVAC library - Security library - Surge protection library - Automatic project timeline charts
- Keep track of all your projects by installation phases

Automatic task/scheduling calendars

- Easily create daily, weekly or month calendars showing project tasks

Create outlines and slide show presentations

- Organize your projects using project outlines for your client or staff
- Easily create over 12 different kinds of graphs in full color

Built in spreadsheet and tables

- Create spreadsheets to display vital information to client or staff

Built in word processor with spelling checker

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# Technical Support

Positive Solutions that get Results

## Key Features

- Direct connection to software developer
- Professional Technical Support
- Educational training available
- Custom programming available
- On-Line Help on every screen

## Platform Compatibility

- Windows 95 – 98 – Millennium - 2000 – NT - XP
- Macintosh OS - OSX

## Networking

- Workgroups with up to 250 simultaneous users
- Networking protocols IPX/SPX and TCP/IP
- Low cost licensing per networking

## Importing & exporting

- All graphics file formats are supported
- All text and database file formats are supported
- All data formats supported
- Scriptable importing field mapping for ease of repetitive use

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