

# Custom Proposal System

## Upgrade Revisions 9.5v1

New Features – Enhancements – Bug Fixes

Please review the latest revision and revision history details below.

Please upgrade regularly to take advantage of all the new features and to ensure trouble free operations.

Contact Horizon Software at 715-287-3335, for Technical Support, Questions and Installation assistance.

Version CPS 9.5v1

### POS Convert Quote to Invoice: Keep Quote Number

When you convert a POS Quotation to a Sales Invoice you now have the option to Keep the Current Quote number on the Invoice

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
<b>Other Defaults 8</b>							Next Done
<div>POS</div> <div><input checked="" type="checkbox"/> Convert Quote to Invoice: Keep current Quote Number</div> <div>Acceptance Form</div> <div>Under Logo/Address</div>							

### Proposal: Optimize Pick Products Value List

Remove Category from Value list and increase Model length

## Contacts and Proposal Address: Make these fields Editable

FileMaker Pro - [cps.Contact.fp5]

File Edit View Format

**Delete** **Add Task** **Add Contact** **Contact Detail** 7 of 298 **Find** **Done**  
**Dup** **Add POS** **Transactions ?** **Danila Angileri** **Print Merge** **Other Info**

Category: Client Group: Class: Key: Status: Identifier: Staff:

Company: Fav: Web Address:

Fav	First Name	Last Name	Key	Title	Salutation	E-Mail & Information	eMail
<input checked="" type="radio"/>	Danila	Angileri	<input checked="" type="radio"/>			amorenanila@yahoo.com	
<input type="radio"/>			<input type="radio"/>				
<input type="radio"/>			<input type="radio"/>				
<input type="radio"/>			<input type="radio"/>				

Fav	Address	Fav	Phone
<input checked="" type="radio"/>	City: State: Zip: Country:	<input type="radio"/>	Home Phone: ext: cc:
<input type="radio"/>		<input type="radio"/>	Work Phone: ext: cc:
<input type="radio"/>		<input type="radio"/>	ext: cc:
<input type="radio"/>		<input type="radio"/>	ext: cc:
<input type="radio"/>		<input type="radio"/>	ext: cc:
<input type="radio"/>		<input checked="" type="radio"/>	Mobile: 323.687.1609
<input type="radio"/>		<input type="radio"/>	Pager:
<input type="radio"/>		<input type="radio"/>	
<input type="radio"/>		<input type="radio"/>	Fax 1:
<input type="radio"/>		<input type="radio"/>	Fax 2:

Version CPS 9.4v3

## Proposals: Fix Proposal Payment Amounts with No Tax

Version CPS 9.4v2

## Setup.Multi Company Option: Include Install Labor

You can now Enter the Labor Rates for each Company into the Multi Company screen and they will stay with each company when you switch companies.

First click on the Other Defaults/Multi Company button and enter the Company info and Hourly Labor into Companies 1-8 that you are using.


Then use the Switch Company button to change CPS to the company you desire.

Proposal Text	Payment Terms	Other Defaults ?	<b>Master Set-Up</b> Please use normal style text	Access Codes	Proposal Numbers	Done
---------------	---------------	------------------	--	--------------	------------------	------

Company Name: <input type="text" value="1"/>	CPS Expiration Date: 2/18/2024 GraphicsDraw! Access enabled
Address: <input type="text"/> City: <input type="text"/> State: <input type="text"/> Zip: <input type="text"/>	Purchasing Ship To: Warehouse Address Address: <input type="text"/> City: <input type="text"/> State: <input type="text"/> Zip: <input type="text"/> Buyer: <input type="text"/>
Phone: <input type="text"/> Fax: <input type="text"/>	
Switch Company <input type="checkbox"/> Permit # <input type="text"/>	

RATES	SERVICES	PRINT
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<table border="1"> <thead> <tr> <th>Hourly</th> <th>Cost</th> <th>Sell</th> <th>List</th> </tr> </thead> <tbody> <tr> <td>Install Labor:</td> <td>\$1</td> <td>\$1</td> <td>\$1</td> </tr> </tbody> </table> Misc Parts Charge: <input type="text" value="5%"/> of Equip <input type="text"/> of Labor	Hourly	Cost	Sell	List	Install Labor:	\$1	\$1	\$1	Extra Warranty? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO <input type="text" value="4%"/> of Equip	<u>Show List Prices?</u> <input type="radio"/> Show list prices and discount <input checked="" type="radio"/> Do <u>not</u> show list prices				
Hourly	Cost	Sell	List											
Install Labor:	\$1	\$1	\$1											
<table border="1"> <thead> <tr> <th>A</th> <th>Tax Rates</th> <th>B</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> 1</td> <td><input type="text" value="5.000%"/></td> <td>Installed</td> </tr> <tr> <td><input type="radio"/> 2</td> <td><input type="text" value="0.000%"/> Added.....</td> <td><input type="text" value="0.000%"/></td> </tr> <tr> <td><input type="radio"/> 3</td> <td><input type="text" value="0.000%"/> Compound</td> <td><input type="text" value="0.000%"/></td> </tr> </tbody> </table> <input type="text" value="YES"/> Tax Labor <input type="text" value="YES"/> Tax Misc Parts <input type="checkbox"/> Tax 2 AB Override Option	A	Tax Rates	B	<input checked="" type="radio"/> 1	<input type="text" value="5.000%"/>	Installed	<input type="radio"/> 2	<input type="text" value="0.000%"/> Added.....	<input type="text" value="0.000%"/>	<input type="radio"/> 3	<input type="text" value="0.000%"/> Compound	<input type="text" value="0.000%"/>	On-Site Service? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO <input type="text" value="2%"/> of Equip	Charge & Show Tax? <input checked="" type="radio"/> YES <input type="radio"/> NO Show Product Text? <input type="text" value="Product"/>
A	Tax Rates	B												
<input checked="" type="radio"/> 1	<input type="text" value="5.000%"/>	Installed												
<input type="radio"/> 2	<input type="text" value="0.000%"/> Added.....	<input type="text" value="0.000%"/>												
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Taxed items (T) = Tax A on the Sell price and Tax B will be 0 Installed items (I) = Tax A will be 0 and Tax B will be on the Cost	Tax Services <input type="radio"/> YES <input type="radio"/> NO Services are Added to Misc Parts Suggested Referral Bonus <input type="text" value="5.0%"/> Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO	Prices Guaranteed For: <input type="text" value="30"/> Days Prices Quoted Are: <input checked="" type="radio"/> ESTIMATED <input type="radio"/> GUARANTEED Show Product Listing <input type="text" value="A Make-Model-Cat-Desc-Fin"/>												

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text	Multi Company	<b>Other Defaults 1</b>					 Next Done

CPS System Settings

Run CPS in  
Secure Mode

Enable  
FileMaker Menus

It is **recommended** that you run CPS in the Secured Mode during the normal operation of the Custom Proposal System to prevent accidental misuse the program.

**Please note:** In order for this feature to work it is necessary to

1. Copy the file named **Securefm.fmx** from the CPS Plugin folder into the Program Files/FileMaker/System folder.
3. Then restart FileMaker and click on the Set Software Preferences (on this screen) and click on the Plug-In's tab and make sure that the **SecureFM Plug In** is checked.

Enter Company info and Hourly Labor into Companies 1-8 that you are using.



Check  
Spelling

## Multi Company Names

Please use normal style text & do not exceed the size of these blocks.



Done

1

Shop Name

Name: EME Audio

Address:

City:

State:

Zip:

Phone:

Fax:

Purchasing Ship To: Warehouse Address

Address:

City:

State:

Zip:

Buyer:

**EME**  
**audio & video**

Permit #

Install Labor: 

Hourly	Cost	Sell	List
	\$50	\$90	\$100

EME Audio

### 1 - Cover Page - Company Introduction

Electronic Design Associates is Wisconsin's leading custom electronics design and installation company. Since 1972, our reputation for quality, innovation and professionalism has been carefully built with thousands of successful installations.

This proposal represents a design carefully prepared with your requirements, our experience and industry standards all balanced to form a workable plan.

Please evaluate this proposal to determine if it meets your needs and budget. EDA's design flexibility allows us to easily modify this proposal to truly meet your expectations. This plan can be fully implemented at this time or in stages as your needs grow.

Investing in quality electronics and having them properly installed will provide you with many years of trouble free service and enjoyment. Please let me know how I can help make your ideas become reality.

2

Name: 2

Address: 2 Lane

City: Strum 2

State: WI2 Zip:

Phone: 715-287-P22

Fax: 715-287-F22

Purchasing Ship To

Address:

City:

State:

Zip:

Buyer:

2 Electronic  
design and  
innovation  
successful

This prop  
requiremen  
workable p

Please eval  
EDA's des  
meet your  
in stages as

Investing i  
provide you  
let me know


























































































































































































## Project/Change Order: Change Done Button Find Method

<b>Add Area</b>	<b>Pick Sets</b>	<b>Change Order Product</b>		<b>Done</b>
<b>Add Product</b>	<b>Pick Products</b>	Judy Hardin-Gideon		
<b>Add product to Product Library</b>	<b>Pick</b>	ALLEY		CLASS: A
Qty: 1	Make: <input type="text"/>	Department: <input type="text"/>	Tax: T	
Model: <input type="text"/>		SKU#: <input type="text"/>	Phase: 0	
Category: <input type="text"/>		Location: <input type="text"/>		
Description: <input type="text"/>		Supplier: <input type="text"/>		
Features: <input type="text"/>		Parts: <input type="text"/>		
<b>Unit</b>	Cost: <input type="text"/>	GP%: 0.0%	W/ADJUST	
<input type="text"/>	Sell: <input type="text"/>	Set Sell Calc 0.0% Price Calc	ACTUAL SELL:	
List: <input type="text"/>	PRICING ERROR!	INSTALLATION:		
Installation: <input type="text"/>	Min.Sec <input type="text"/>	Hours to Min <input type="text"/>	\$70.00/Hour INSTALLED PRICE:	
Base Wire \$: <input type="text"/>	Weight: <input type="text"/>	Rack Spaces: <input type="text"/>	Finish: <input type="text"/>	
Wire Type: 1 Good	AC Consumption: <input type="text"/>	W: <input type="text"/>	H: <input type="text"/>	D: <input type="text"/>
Wire Amount: 0.00	DC Consumption: <input type="text"/>	Warranty: <input type="text"/>		
Modify Product Cost Password: <input type="text"/>				
Change Order Text:	<input type="text"/>			

## Proposal/System Design: Fix entering and exiting screen

Add New Area	Area Utilities	13	Proposal Areas		?	Proposal Products	Done
Mr. Harrington							
click on Area or Text to modify							
Products	Areas	Zone	Area	Area Text		System Design	Scope of Work
Add View	Dup Del						
		1 n	MASTER BEDROOM	This area includes the following products and features:			
		2 n	MASTER BATH	This area includes the following products and features:			
		3 n	BEDROOM 2	This area includes the following products and features:			
		4 n	BEDROOM 3	This area includes the following products and features:			
		5 n	GUEST BATHROOM	This area includes the following products and features:			
		6 n	DINING ROOM	This area includes the following products and features:			

# Proposal/Products: Delete Blank Products

Show All Products		Sort	Find Products		Replace Model	Change Price	View Areas		 				
Detail List	Product Utilities	108 	Proposal Products Line List Dr. Conlee				Delete Blank - - Products	Add Area	Done				
Click on Area to show only that Area			View Add ↓	Delete ↓ Place ↓	Pick ↓	Qty	Make	Model	Unit	Unit Sell	Total Sell	Unit List	Total List
Zone-Area		Products: \$40,503.65		Install: \$9,642.00		Misc Parts: \$2,25.19		Sub Total:		\$52,170.84			
1a MULTI-ZONE HOUSE AUDIO	    	    	1	ASHLEY	XR-1001	ea	399.00	399.00	400.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	10	CUSTOM	PVI	ea	0.00	0.00					
1a MULTI-ZONE HOUSE AUDIO	    	    	2	PHAST	PCS-2	ea	299.00	598.00	300.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	1	PHAST	PLB-AS16	ea	1995.00	1995.00	1,995.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	1	PHAST	PLB-CF10	ea	799.00	799.00	825.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	1	PHAST	PLC-IN7	ea	250.00	250.00	250.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	2	PHAST	PLC-IROUT	ea	250.00	500.00	250.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	1	PHAST	PLC-MCU	ea	625.00	625.00	625.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	2	PHAST	PLC-RL8	ea	250.00	500.00	250.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	6	PHAST	PLK-DMS	ea	499.00	2994.00	499.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	3	PHAST	PLK-SB2	ea	179.00	537.00	180.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	1	PHAST	PLM-IR1	ea	180.00	180.00	180.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	1	PHAST	VSS2	ea	155.00	155.00	175.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	1	SONY	CDP-CX240	ea	399.00	399.00	480.00				
1a MULTI-ZONE HOUSE AUDIO	    	    	2	XANTE	680-10	ea	300.00	600.00	400.00				
1d GARAGE	    	    	1					0.00					
1d GARAGE	    	    	2	CUSTOM	1SHR14	ea	35.00	70.00	40.00				
1f LOGGIA	    	    	2	CUSTOM	1SHR14	ea	35.00	70.00	40.00				





## Project/Change Orders: Fix CO numbering

Printer Setup		Delete Blank Products						Print CO - P.O. Summary				
Add Areas & Products	Pricing Parts & Labor	Modify Change Order	?	Change Orders Jim Engandela Horizon Software 1577-00 v1				RePrint C-Orders		Done		
								Area Text Y	Prod Text Y	List Price Y	Sales Tax Y	View/Print C-Orders
Subtract Products		Show All Sort #		P=Proposed C=Changed A=Added D=Deleted								
Zone Area				CO#	Class	Qty	Make	Model	Category-Description		Unit Sell	Ext Sell
		APARTMENT			P	1 ea	A2V - AS1339 - ARTICULATING MOUNT BLACK				\$55.00	\$55.00
		APARTMENT			C	4 ea	ACTIONTECH - HLE2004302KP - POWERLINE				\$148.00	\$592.00
		APARTMENT			C	6 ea	ALTINEX - CB9103AV - VGA CABLE BLACK				\$18.00	\$108.00
		APARTMENT		1	A	5 ea	B&W - ASW610 - SUBWOOFER SPECIFY COLOR				\$650.00	\$3,250.00
		APARTMENT		1	A	3 pr	B&W - CWM663 - IN-WALL SPEAKER OFF WHITE				\$750.00	\$2,250.00
		APARTMENT		4	A	6 ea	SONOS - BEAM WALL MOUNT (W) - WALL MOUNT				\$59.00	\$354.00
		APARTMENT		3	D	-2 ea	ACTIONTECH - HLE2004302KP - POWERLINE				\$148.00	-\$296.00
		APARTMENT		2	D	-3 ea	ALTINEX - CB9103AV - VGA CABLE BLACK				\$18.00	-\$54.00
		BASILICA			P	4 ea	ALLIED TELESIS INC - ATFS708LE - 8 PORT SWITCH				\$62.50	\$250.00

Version CPS 9.2v1

### Proposal: Modify Payment Structure so Payments Equal the Grand Total amount.

Rounding the Payment amounts causes them to add up to a Grand Total that is a few cents off. This has been corrected.

New Proposals will automatically be correct.

Existing Proposals/Projects and Completed Projects can be Manually Reset from the Proposal Set-Up and Print Menu screens.

Proposals/Projects and Completed Projects that have had their Payments reset will display the message "Payment Amounts have been Adjusted"

Once a Proposals/Projects and Completed Project has be "Reset" it will from then on be automatically Reset every time you enter the Print Menu. This ensures that changes made to the Proposal will be reflected in the Payment Amounts



Proposal Text	Payment Terms	Other Defaults	Print Pricing Setup	Proposal Set-Up Evilin Kluka	?	Proposal Pricing	Done																								
<input type="radio"/> 0 Cash On Delivery <input type="radio"/> 1 Payment Charge <input type="radio"/> 2 Payment Plan <input checked="" type="radio"/> 3 Payment Plan <input type="radio"/> 4 Payment Plan <input type="radio"/> 5 Payment Plan <input type="radio"/> 6 Special Terms				<b>PAYMENT PLANS</b> 50% Deposit due upon acceptance 40% Payment due before finish phase 10% Payment due upon completion		<input type="button" value="Reset Payment Amounts"/>																									
Use normal style text & do not exceed this text block. <div style="border: 1px solid black; height: 40px; width: 100%;"></div>						4,993.40 3,994.76 998.74  <b>Sub Total: 9,725.38</b> Tax: 261.52 <b>Grand Total: 9,986.90</b>																									
<b>RATES</b> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Hourly</th> <th style="text-align: center;">Cost</th> <th style="text-align: center;">Sell</th> <th style="text-align: center;">List</th> </tr> </thead> <tbody> <tr> <td>Install Labor:</td> <td style="text-align: center;">30.00</td> <td style="text-align: center;">60.00</td> <td style="text-align: center;">60.00</td> </tr> <tr> <td>Misc Parts Charge:</td> <td colspan="3"> <input type="text" value="5%"/> % Equip  <input type="text" value=""/> % Labor         </td> </tr> </tbody> </table> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">A</th> <th style="text-align: center;">Tax Rates</th> <th style="text-align: left;">B</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> 1</td> <td style="text-align: center;">8.750%</td> <td style="text-align: center;">Installed</td> </tr> <tr> <td><input type="radio"/> 2</td> <td style="text-align: center;">4.000% Added.....</td> <td style="text-align: center;">2.000%</td> </tr> <tr> <td><input type="radio"/> 3</td> <td style="text-align: center;">1.000% Compound</td> <td style="text-align: center;">5.000%</td> </tr> </tbody> </table> <input type="button" value="NO"/> Tax Labor      Tax Help ? <input type="button" value="YES"/> Tax Misc Parts <input type="checkbox"/> Tax 2 AB Override Option <small>Taxed items (T) = Tax A on the Sell price and Tax B will be 0             Installed items (I) = Tax A will be 0 and Tax B will be on the Cost</small>				Hourly	Cost	Sell	List	Install Labor:	30.00	60.00	60.00	Misc Parts Charge:	<input type="text" value="5%"/> % Equip <input type="text" value=""/> % Labor			A	Tax Rates	B	<input checked="" type="radio"/> 1	8.750%	Installed	<input type="radio"/> 2	4.000% Added.....	2.000%	<input type="radio"/> 3	1.000% Compound	5.000%	<b>SERVICES</b> Extra Warranty? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO <input type="text" value="5%"/> of Equip  On-Site Service? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO <input type="text" value="2.5%"/> of Equip  Tax Services <input type="radio"/> YES <input type="radio"/> NO Services are Added to Misc Parts  Suggested Referral Bonus <input type="text" value="2.5%"/> % Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO		<b>PRINT</b> Show List Prices? <input type="radio"/> Show list prices and discount <input checked="" type="radio"/> Do <u>not</u> show list prices  Charge & Show Tax? <input checked="" type="radio"/> YES <input type="radio"/> NO  Show Product Text? <input type="text" value="YES"/>  Prices Guaranteed For: <input type="text" value="31"/> Days  Prices Quoted Are: <input checked="" type="radio"/> ESTIMATED <input type="radio"/> GUARANTEED  Show Product Listing <input type="text" value="A Make-Model-Cat-Desc-Fin"/>	
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<input type="radio"/> 3	1.000% Compound	5.000%																													
						Payment Amounts have been Reset																									

<div style="text-align: center; font-weight: bold; font-size: 1.2em;">Main Print Menu</div> <div style="text-align: center; font-weight: bold;">EME Audio &amp; Video Systems</div> <div style="text-align: center; margin-top: 10px;">Dr. Khika</div> <div style="text-align: center; margin-top: 10px;">Home Electronic Systems</div> <div style="text-align: center; margin-top: 5px;">PROPOSAL: 1578-00 <span style="border: 1px solid black; padding: 2px 10px;"> </span></div> <div style="text-align: center; background-color: #FFDAB9; padding: 5px; margin-top: 5px;">Done</div> <div style="text-align: center; background-color: #FFB6C1; padding: 5px; margin-top: 5px;">Custom Proposals</div> <div style="text-align: center; background-color: #FFD700; padding: 5px; margin-top: 5px;">Dealer Proposals</div> <div style="margin-top: 10px;"> <div style="border: 1px solid black; padding: 2px; text-align: center; background-color: #90EE90; margin-bottom: 5px;">Selected Phase All Phases</div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <th style="font-size: 0.8em;">Area</th> <th style="font-size: 0.8em;">Prod</th> <th style="font-size: 0.8em;">List</th> <th style="font-size: 0.8em;">Sales</th> </tr> <tr> <th style="font-size: 0.7em;">Text</th> <th style="font-size: 0.7em;">Text</th> <th style="font-size: 0.7em;">Price</th> <th style="font-size: 0.7em;">Tax</th> </tr> <tr> <td>Y</td> <td>Y</td> <td>N</td> <td>Y</td> </tr> </table> <div style="background-color: #FFB6C1; padding: 2px; margin-top: 5px; font-size: 0.8em;">A Make-Model-Cat-Desc-Fin</div> </div> <div style="margin-top: 10px;"> <div style="text-align: center; font-weight: bold; font-size: 0.9em;">Prices Guaranteed</div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>From: 11-11-21</span> <span>For: 31 Days</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>Until: 12-12-21</span> </div> <div style="margin-top: 5px;"> <div style="text-align: center; font-size: 0.8em;">Proposal Date</div> <div style="border: 1px solid black; padding: 2px; text-align: center; font-size: 0.8em;">11/11/21</div> </div> <div style="margin-top: 5px; text-align: center;"> <div style="background-color: #FFD700; padding: 2px; display: inline-block; font-size: 0.8em;">Creation Date</div> <div style="background-color: #FFD700; padding: 2px; display: inline-block; font-size: 0.8em; margin-top: 5px;">Printer Setup</div> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Show Print Dialog         </div> <div style="margin-top: 5px; text-align: center;"> <div style="background-color: #FFD700; padding: 2px; display: inline-block; font-size: 0.8em;">Free PDF App</div> </div> </div>	Area	Prod	List	Sales	Text	Text	Price	Tax	Y	Y	N	Y	<div style="text-align: center; font-weight: bold; font-size: 1.2em;">Store Reports</div> <div style="text-align: center; font-weight: bold; font-size: 0.9em;">ViewPrint</div> <div style="margin-top: 5px;"> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Project Job Costing             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Products @ Cost             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Products @ Cost-Dept             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Products by Phase             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Product Summary             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Product Status             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Product Specs             </div> </div> <hr/> <div style="margin-top: 5px;"> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> P.O.'s             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> P.O. Summary             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> P.O. - CO Summary             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Bid Submittal             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Warehouse Pallet             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Product Sold Stickers             </div> </div> <hr/> <div style="margin-top: 5px;"> <div style="text-align: right; font-size: 0.8em;">No Breaks</div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Work Order             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Work Order (Detail)             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Work Order (Special)             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Install Sales Invoice             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Project Sales Invoice             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Blank Change Order             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Blank Quality Control             </div> </div> <hr/> <div style="margin-top: 5px;"> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Mailing Labels             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Project Reconciliation             </div> </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="font-size: 0.8em;">1st Draft</div> <div style="text-align: center; font-weight: bold; font-size: 1.5em;">Client Proposals</div> <div style="text-align: right; font-weight: bold; font-size: 1.2em;">Done</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 48%;"> <div style="text-align: center; font-weight: bold; font-size: 0.9em;">Product &amp; Install Prices Separate <u>Entire Proposal</u></div> <div style="text-align: center; margin-top: 10px;"> </div> <div style="text-align: center; margin-top: 10px;"> <div style="text-align: center; font-size: 0.8em;"><u>Proposal Sections</u></div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>view</span> <span>print</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Product Summary                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Area Summary                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Project Info                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Contract                 </div> </div> </div> <div style="width: 48%;"> <div style="text-align: center; font-weight: bold; font-size: 0.9em;">Product &amp; Install Prices Combined <u>Entire Proposal</u></div> <div style="text-align: center; margin-top: 10px;"> </div> <div style="text-align: center; margin-top: 10px;"> <div style="text-align: center; font-size: 0.8em;"><u>Proposal Sections</u></div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>view</span> <span>print</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Product Summary                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Area Summary                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Project                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Contract                 </div> </div> </div> </div> <hr/> <div style="margin-top: 10px;"> <div style="text-align: center; font-size: 0.8em;"><u>Additional Proposal Sections</u></div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Letterhead Cover Page                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Area/Product Prices - No Area Text                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Area Summary with tax                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Extra Text                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Extra Contract                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Technical Services (Labor)                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Follow-Up Letters                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Scope of Work                 </div> </div> <div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> w/Parts Labor                 </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> <input type="checkbox"/> Editable Extra                 </div> </div> </div> <div style="text-align: right; margin-top: 10px;"> <div style="border: 1px solid black; padding: 5px; background-color: #FFB6C1; font-weight: bold; font-size: 0.9em;">Reset Payment Amounts</div> </div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> Show Proposal Total Amount on Cover page             </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <input type="checkbox"/> Export Project Sales Invoice to Excel             </div> </div>
Area	Prod	List	Sales											
Text	Text	Price	Tax											
Y	Y	N	Y											

These proposals print one area per page.

Custom proposals print without page breaks between areas.

[View](#)

Payment Amounts have been Reset

**Project/Work Orders & Invoices: Fix Numbering**



Preview Work Order	Print and Post	Work Order Detail		Post WO No Print	Done
First Name	Judy	<div>Modify Work Order</div> <div>Create POS Work Request</div>	Invoice	1003	
Last Name	Hardin-Gideon		Proposal	165600	
Address	172 South Sycamore		Invoice Date	11/12/2021	
City	Los Angeles		Posted Date	11/12/2021	
State Zip	CA 90036		Other WO Labor Hours		
Appointment Day		Actual Start Date		Reschedule	<input type="checkbox"/>
Appointment Date		Actual Start Time		Shop Dept	
Appointment Time		Actual Stop Time		Installer	
		Actual Stop Date		WO written by	
Instructions					
Zone - Area	Qty	Make	Model	Description	
1 - BONUS ROOM	1 ea	LINN	AV 5110 LOCAL	SMALL FULL-RANGE	
1 - BONUS ROOM	1 ea	LINN	AV 5140BA	BLACK WITH BLACK	
FOUR SEASONS ROOM	1 ea	LINN	CLASSIK	INTEGRATED CD	

Preview Invoice	Print and Post	Sales Invoice - Detail		Post Invoice No Print	Done
First Name	Judy	<div>Modify Invoice</div>	Invoice	1005	
Last Name	Hardin-Gideon		Proposal	165600	
Address	172 South Sycamore		Invoice Date	11/12/2021	
City	Los Angeles		Posted Date	11/12/2021	
State Zip	CA 90036		Export Date		
Home Phone	(323) 931-1511	Payment Method			
Work Phone	(310) 306-2066	Credit Card Type			
		Credit Card Expire			
		Credit Card Number			
Qty	Make	Model	Description	Unit Sell	Extended Sell
1 ea	LINN	5120 AKTIV	ACTIVE CROSSOVER	225.00	225.00
1 ea	LINN	TUKAN PASSIVE	CHERRY OR ROSENU	845.00	845.00
4 m	LINN	K400 CABLE	BI-WIRE SPEAKER	24.00	96.00

POS: Work Order Text size increase

cps.Pos

Print-W/O

SHOP LABEL ALL FOR POS

Done

Layouts: 25

54

Field

Part

Service Requested:

Description of Problem:

Special Instructions:

SPECIAL INSTRUCTIONS

Technical Services

Technical Services	Hrs	Rate	Am
Equipment Installation	GRAN	LABOR	0
MISC LABOR	MISC	MISC	

QTY	unit	PRODUCT DESCRIPTION	PRICE	TOTAL
QTY	unit	PRODUCT FULL DESCRIPTION	UNIT	TOTAL

Other Charges

Invoice I

INVC

TODAYS D

Appointment: APPC

Start Date: START DA

Start Time: Time start

Reschedule: RESCHEDL

Dept: Dept

Proposal No: POSAL NUM

Cust. No: YOU

Finish Date: FINIS

Finish Time: End s

Completed: Data

Tech: Instal

12 point

Version CPS 9.1v5

## Picking Contacts into POS: New Features

New: Contact Name showing list will be the FAV Contact

New: When Picking a Contact for a POS Invoice the POS Invoice will be the FAV Name, Title, Salutation and Email

New: At the POS Create Invoice screen, you can now choose any of the Contacts for that Invoice

Delete Add Task Add Contact

Dup Add POS Transactions ?

Contact Detail 1 of 2 Find Done

Jim1 Engandela1 - Horizon Software Print Merge Other Info

Category: Vendor Group: sss Class: class Key: key Status: fffrr

Identifier: rrrrrr Staff: fff

Company: Horizon Software Fav: Web Address:

Fav	First Name	Last Name	Key	Title	Salutation	E-Mail & Information	eMail
<input checked="" type="radio"/>	Jim1	Engandela1	<input checked="" type="radio"/>	Title 1	Mr.1	horizonse@trivest.net1	
<input type="radio"/>	Fred2	Smith2	<input type="radio"/>	Title 2	Mr.2	horizonse@trivest.net2	
<input type="radio"/>	John3	Johnson3	<input checked="" type="radio"/>	Title 3	Mr.3	horizonse@trivest.net3	
<input type="radio"/>	Paul4	Jones4	<input type="radio"/>	Title 4	Mr.4	horizonse@trivest.net4	



Find Contacts	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Add Contact	2 of 2	Contacts																		10/3/21	POS	Done						
Contact Views	?	Click to view detail Pick to create a POS Invoice or Task																		 	Utility	Print Menu						
Pick	Fav Name	Company										Category										eMail	Fav Phone	Fav				
	Engandelal, Jiml	Horizon Software										Vendor											(W) 715-287-3335					
		Capitol Sales Company										Vendor											(W) 800-467-8255					

1053
**Create a POS Invoice**
Cancel

Pick Contact

Title 1	Mr.1	Jim1 Engandela1	horizonse@trivest.net1
Title 2	Mr.2	Fred2 Smith2	horizonse@trivest.net2
Title 3	Mr.3	John3 Johnson3	horizonse@trivest.net3
Title 4	Mr.4	Paul4 Jones4	horizonse@trivest.net4

Pick Invoice for

**Mr.1 Jim1 Engandela1**  
**Horizon Software**  
horizonse@trivest.net1

QUOTATION
 SERVICE ORDER
 CHANGE ORDER

SALES INVOICE
 Credit Memo
 WORK ORDER
 PURCHASE ORDER

ACCEPTANCE FORM
 WORK REQUEST

Version CPS 9.1v4

Project/WO/WO List: Fix Done with no WO's



Project Work Order Done button now returns to Project properly.

<b>Create Work Order</b>		<b>Print Status Report</b>		<b>Work Order's</b>				<b>View Lab Log</b>		<b>PO WO ST</b>		<b>Done</b>	
Selected Phase All Phases		Capitol Sales Company 1002-00				Auto Set/Clear Install Qty							
Clear Action Flags				Product Installed		Labor Sold		20.0					
click on brown fields to enter data				To Install 31		-Used							
Zone-Area				Make Model		Hours Left		20.0					
Action Flag				Sold Installed Left		Work Order		Sold Installed Left					
OTHER LABOR													
EXERCISE ROOM				LINN - PACKAGE SET -		1		1				0.0	

SCPS-CPS Link for SCPS: Expiration notice & SCPS Horizon button CPS 9.1v4

SCPS users can now update their subscription code directly from the CPS screen.

**::CPS ACCESS Warning**


# Custom Proposal System

demo display

::LOGO LARGE

<<CPS\_SCPS-PrefOne::zi.scpsRenewalReminder.c>>


POS	Contacts	Proposals	Products	Tasks
Info	Forms	Projects	Sets	Reports
Utility	Follow-up	Completed	Text	SCPS
Set-Up	Graphics	Archive	Letters	Horizon



Help

HORIZON SOFTWARE

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Exit

**Proposal: Add Text Cue for Direct Build**

Add default text to Direct Build

"This proposal represents a design carefully prepared with your requirements, our experience and industry standards all balanced to form a workable plan."

Defaults 1 System Settings	Defaults 2 Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Defaults	Defaults 8 POS Settings
Replace Fields with Default Text	Example Shown Below	<b>Other Defaults 3</b> Please stay within field borders				?	Next Done
<b>Proposal - System Design Text</b>							
<input type="checkbox"/> <b>NO SYSTEM TEXT</b> <b>DEFAULT SYSTEM TEXT</b> This proposal represents a design carefully prepared with your requirements, our experience and industry standards all balanced to form a workable plan.							
<b>OPTIONAL SYSTEM TEXT</b> This Proposal has been designed for you.							

**Proposal: Add 6 new Other Labor entries**

You now can have 12 Other Labor entries in your Proposal.

Improve both screen GUI for better clarity

Set the Default Labor from your Logo Screen/Setup/Other Default 2 screen

# Custom Proposal System



POS	Contacts	Proposals	Products	Tasks
Info	Forms	Projects	Sets	Reports
Utility	Follow-up	Completed	Text	SCPS
Set-Up	Graphics	Archive	Letters	Horizon



HORIZON SOFTWARE

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Proposal Text	Payment Terms	Other Defaults	Master Set-Up	Access Codes	Proposal Numbers	Done
			Please use normal style text			
<b>Company Name:</b> EME Audio Video Systems			<b>CPS Expiration Date:</b> CPS access is enabled			
<b>Address:</b> S15700 Hwy D			<b>GraphicsDraw!</b> Access enabled			
<b>City:</b> Strum						
<b>State:</b> WI <b>Zip:</b> 54770						
<b>Phone:</b> (715) 287-3335			<b>Purchasing Ship To: Warehouse Address</b>			
<b>Fax:</b> (715) 287-4464			<b>Address:</b> 414 W Ridgmont			
<b>Permit #</b> Permit: 1234			<b>City:</b> Strum			
<b>Switch Company</b>			<b>State:</b> WI <b>Zip:</b> 54770			
			<b>Buyer:</b> Jim Engandela			

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text	Multi Company	<b>Other Defaults 1</b>					Next Done
<b>CPS System Settings</b>							



Proposal Install Phases

PHASE DESCRIPTIONS

PHASE 1	Prewire Phase
PHASE 2	Trim Phase
PHASE 3	Finish Phase
PHASE 4	Training Phase
PHASE 5	Follow-Up Phase

Proposal Labor Rates

LABOR RATE

	<u>Hourly</u>	<u>Cost</u>	<u>Sell</u>	<u>List</u>
Install Labor:	\$50	\$70	\$80	
	- 28.6%		+ 14.3%	

Proposal Other Labor Rates

OTHER LABOR DESCRIPTION	Hourly Rate		
	<u>Cost</u>	<u>Sell</u>	<u>List</u>
Installation	\$10.00	\$100.00	\$110.00
Engineering	\$20.00	\$200.00	\$220.00
Travel	\$30.00	\$300.00	\$330.00
Training	\$40.00	\$400.00	\$440.00
Consultation	\$50.00	\$500.00	\$550.00
Travel	\$60.00	\$600.00	\$660.00
Seven	\$70.00	\$700.00	\$770.00
Eight	\$80.00	\$800.00	\$880.00
Nine	\$90.00	\$900.00	\$990.00
Ten	\$100.00	\$1000.00	\$1010.00
Eleven	\$110.00	\$1100.00	\$1011.00
Twelve	\$120.00	\$1200.00	\$1012.00

- Activate  
Option

Project Management % of Labor \$

Prep & Travel Time (1 hr of prep per 8 hrs of Labor)

Auto cue when going into the Proposal Print Menu
- AutomaticallyAdd  
these Labor Items  
to Other Labor 5 & 6

Cost & List will auto calc if empty

Sales Tax	Sales Comm	Print Pricing Setup	<b>Proposal Pricing</b>		?	<b>Proposal Set-Up</b>	Done
Products							
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Selected Phase All Phases</div>		<b>Adjust All Product Prices</b>				44.4% GP	
		<div style="border: 1px solid black; padding: 2px; display: inline-block;">ORIGINAL PRICES</div>	%	<div style="border: 1px solid black; width: 50px; height: 20px;"></div>		<div style="border: 1px solid black; padding: 2px; display: inline-block;">Update</div>	
		<b>Adjust All Product Costs</b>				<div style="border: 1px solid black; width: 50px; height: 20px;"></div>	
		%		<div style="border: 1px solid black; width: 50px; height: 20px;"></div>		<div style="border: 1px solid black; padding: 2px; display: inline-block;">Update</div>	
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Adjust Select Products</div>						\$339.95	
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Reset Costs</div>							
Labor							
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Update</div>							
Other Labor Description		Hourly Sell Rate	Labor Hours	% of Prod Lab	Labor \$ Amount	Total	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Zero Product Hours</div>
							<div style="border: 1px solid black; padding: 2px; display: inline-block;">Hours</div>
							<div style="border: 1px solid black; padding: 2px; display: inline-block;">Amount</div>
Installation		\$100.00	4.0			\$400.00	Product Labor: 5.0 \$350.00
Engineering		\$200.00	2.0			\$400.00	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Difficulty Factor</div>
Travel		\$300.00	2.0			\$600.00	
Training		\$400.00				\$0.00	
Project Management		\$500.00			\$150.00	\$150.00	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Project Management Amount to Labor 5</div>
Prep & Travel Time		\$600.00	2.0			\$1,200.00	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Add Prep &amp; Travel Time to Labor 6</div>
Seven		\$700.00				\$0.00	
Eight		\$800.00		15.0%		\$52.50	
Nine		\$900.00				\$0.00	
Ten		\$1000.00			\$576.00	\$576.00	← Other Labor: 10.0 \$3,378.50
Eleven		\$1100.00				\$0.00	Adjust Labor: <div style="border: 1px solid black; width: 50px; height: 20px;"></div>
Twelve		\$1200.00				\$0.00	Installation: 15.0 \$3,728.50
Misc Parts							
<u>Suggested Referral Bonus</u> % of Equip \$17.00 % of Total \$204.27 Change Parts Label: <input type="radio"/> YES <input checked="" type="radio"/> NO		Parts & Materials: <div style="border: 1px solid black; width: 50px; height: 20px;"></div> + - Referral Bonus: <div style="border: 1px solid black; width: 50px; height: 20px;"></div> Base Parts/Wire Total: 0.00				Misc Parts: \$17.00 Extra Warranty: \$0.00 On-Site Service: \$0.00 Parts & Materials: \$17.00	
Proposal Totals							
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Update</div>							
	<u>Cost</u>	<u>Profit</u>	<u>System Price</u>	<u>GP</u>	<u>Products &amp; Install:</u> <u>System Price</u>		
Products:	189.08	150.87	339.95	44.4%	4,068.45		
Installation:	2,662.25	901.52	3,728.50	28.1%			
Parts & Materials:	8.50	8.50	17.00	50.0%			
Sub Total:	\$2,859.83	\$1,225.62	\$4,085.45	30.0%			
		Tax:	187.28		Tax A 187.28		
HP Hourly Profit (Gross Profit/Labor Hours)		Grand Total:	\$4,272.73		Tax B		
\$81.71					Adjust Tax: <div style="border: 1px solid black; width: 50px; height: 20px;"></div> 0.00		



<div> <b>Main Print Menu</b> </div> <div>       EME Audio &amp; Video Systems        Jim Engandela        Horizon Software        PROPOSAL: 1011-00     </div>	<div> <b>Store Reports</b> </div> <div>       View Print  <input type="checkbox"/> <input type="checkbox"/> Project Job Costing  <input type="checkbox"/> <input type="checkbox"/> Products @ Cost  <input type="checkbox"/> <input type="checkbox"/> Products @ Cost-Dept  <input type="checkbox"/> <input type="checkbox"/> Products by Phase  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Product Status  <input type="checkbox"/> <input type="checkbox"/> Product Specs  <hr/> <input type="checkbox"/> <input type="checkbox"/> P.O.'s  <input type="checkbox"/> <input type="checkbox"/> P.O. Summary  <input type="checkbox"/> <input type="checkbox"/> P.O. - CO Summary  <input type="checkbox"/> <input type="checkbox"/> Bid Submittal <input type="checkbox"/> <input type="checkbox"/> Cost  <input type="checkbox"/> <input type="checkbox"/> Warehouse Pallet <input type="checkbox"/> <input type="checkbox"/>  <input type="checkbox"/> <input type="checkbox"/> Product Sold Stickers  <hr/> <input type="checkbox"/> <input type="checkbox"/> Work Order <input type="checkbox"/> <input type="checkbox"/> No Breaks  <input type="checkbox"/> <input type="checkbox"/> Work Order (Detail) <input type="checkbox"/> <input type="checkbox"/>  <input type="checkbox"/> <input type="checkbox"/> Work Order (Special)  <input type="checkbox"/> <input type="checkbox"/> Install Sales Invoice  <input type="checkbox"/> <input type="checkbox"/> Project Sales Invoice  <input type="checkbox"/> <input type="checkbox"/> Blank Change Order  <input type="checkbox"/> <input type="checkbox"/> Blank Quality Control  <hr/> <input type="checkbox"/> <input type="checkbox"/> Mailing Labels  <input type="checkbox"/> <input type="checkbox"/> Project Reconciliation     </div>	<div> <b>1st Draft Client Proposals</b> <div>Done</div> </div> <table border="1"> <tr> <td data-bbox="862 201 1230 884"> <div> <b>Product &amp; Install Prices Separate</b>  <u>Entire Proposal</u>  </div> <hr/> <div> <u>Proposal Sections</u>  <div>view print</div> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project Info  <input type="checkbox"/> <input type="checkbox"/> Contract         </div> </td> <td data-bbox="1230 201 1588 884"> <div> <b>Product &amp; Install Prices Combined</b>  <u>Entire Proposal</u>  </div> <hr/> <div> <u>Proposal Sections</u>  <div>view print</div> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project  <input type="checkbox"/> <input type="checkbox"/> Contract         </div> </td> </tr> </table> <hr/> <div> <u>Additional Proposal Sections</u>  <div>view print</div> <input type="checkbox"/> <input type="checkbox"/> Letterhead Cover Page  <input type="checkbox"/> <input type="checkbox"/> Area/Product Prices - No Area Text  <input type="checkbox"/> <input type="checkbox"/> Area Summary with tax <input type="checkbox"/> <input type="checkbox"/> w/Parts Labor  <input type="checkbox"/> <input type="checkbox"/> Extra Text <input type="checkbox"/> <input type="checkbox"/> Editable Extra  <input type="checkbox"/> <input type="checkbox"/> Extra Contract  <input type="checkbox"/> <input type="checkbox"/> Technical Services (Labor)  <input type="checkbox"/> <input type="checkbox"/> Follow-Up Letters  <input type="checkbox"/> <input type="checkbox"/> Scope of Work     </div>	<div> <b>Product &amp; Install Prices Separate</b>  <u>Entire Proposal</u>  </div> <hr/> <div> <u>Proposal Sections</u>  <div>view print</div> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project Info  <input type="checkbox"/> <input type="checkbox"/> Contract         </div>	<div> <b>Product &amp; Install Prices Combined</b>  <u>Entire Proposal</u>  </div> <hr/> <div> <u>Proposal Sections</u>  <div>view print</div> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project  <input type="checkbox"/> <input type="checkbox"/> Contract         </div>						
<div> <b>Product &amp; Install Prices Separate</b>  <u>Entire Proposal</u>  </div> <hr/> <div> <u>Proposal Sections</u>  <div>view print</div> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project Info  <input type="checkbox"/> <input type="checkbox"/> Contract         </div>	<div> <b>Product &amp; Install Prices Combined</b>  <u>Entire Proposal</u>  </div> <hr/> <div> <u>Proposal Sections</u>  <div>view print</div> <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project  <input type="checkbox"/> <input type="checkbox"/> Contract         </div>									
<div>Done</div> <div>Custom Proposals</div> <div>Dealer Proposals</div> <div>       Selected Phase        All Phases     </div> <table border="1"> <tr> <td>Area Text</td> <td>Prod Text</td> <td>List Price</td> <td>Sales Tax</td> </tr> <tr> <td>Y</td> <td>S</td> <td>N</td> <td>Y</td> </tr> </table> <div>A Make-Model-Cat-Desc-Fin</div> <div>       Prices Guaranteed        From: 2-19-21        For: 30 Days        Until: 3-21-21        Proposal Date        2/19/21     </div> <div>Creation Date</div> <div>Printer Setup</div> <div> <input type="checkbox"/> Show Print Dialog     </div> <div>Free PDF App</div>	Area Text	Prod Text	List Price	Sales Tax	Y	S	N	Y		
Area Text	Prod Text	List Price	Sales Tax							
Y	S	N	Y							



Proposal: 1011-00

Permit: 1234


2/19/21 Section: 5 Page: 1

## EME AUDIO & VIDEO SYSTEMS

Jim Engandela - Horizon Software

### TECHNICAL SERVICES

Technical Services	Hours	Rate	Total
EQUIPMENT INSTALLATION	5.0	70	\$350.00
INSTALLATION	4.0	100	\$400.00
ENGINEERING	2.0	200	\$400.00
TRAVEL	2.0	300	\$600.00
PROJECT MANAGEMENT		500	\$150.00
PREP & TRAVEL TIME	2.0	600	\$1,200.00
EIGHT		800	\$52.50
TEN		1000	\$576.00
Total:			\$3,728.50

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text		<b>Other Defaults 2</b> Please stay within field borders					?  Next Done

Proposal Install Phases

PHASE DESCRIPTIONS	
PHASE 1	Prewire Phase
PHASE 2	Trim Phase
PHASE 3	Finish Phase
PHASE 4	Training Phase
PHASE 5	Follow-Up Phase

Proposal Labor Rates

LABOR RATE			
	Hourly	Cost	Sell List
Install Labor:		\$50	\$70 \$80
		- 28.6%	+ 14.3%

Proposal Other Labor Rates

OTHER LABOR DESCRIPTION	Hourly Rate		
	Cost	Sell	List
Installation	\$10.00	\$100.00	\$110.00
Engineering	\$20.00	\$200.00	\$220.00
Travel	\$30.00	\$300.00	\$330.00
Training	\$40.00	\$400.00	\$440.00
Consultation	\$50.00	\$500.00	\$550.00
Travel	\$60.00	\$600.00	\$660.00
Seven	\$70.00	\$700.00	\$770.00
Eight	\$80.00	\$800.00	\$880.00
Nine	\$90.00	\$900.00	\$990.00
Ten	\$100.00	\$1000.00	\$1010.00
Eleven	\$110.00	\$1100.00	\$1011.00
Twelve	\$120.00	\$1200.00	\$1012.00

Activate Option

☐ Project Management % of Labor \$

☐ Prep & Travel Time (1 hr of prep per 8 hrs of Labor)

☐ Auto cue when going into the Proposal Print Menu








AutomaticallyAdd these Labor Items to Other Labor 5 & 6

Cost & List will auto calc if empty



You can now import Snap AV Price sheets directly into your Product Library. If a product already exists in CPS the pricing will be automatically updated, so duplicate products will not be created. If the product doesn't exist, it will be added to your library.

The supplier will be SnapAV and you can find all of the SnapAV products by clicking on the Find Supplier button on the product detail screen.

Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Utilities	8 of 8	Product Library																		Detail List		Done						
Utility Views		Line List																		Vendors		Product Sets						
Inventory	 	click on View button for Details																		 		Add Product		Print Menu				
View	Make	Model		Pkg		Category		Description										Price		Fav								
	ALTRONIX	ALT-ALTV248UL		CCTV POWER SUPPLY, 8 FUSED OUTPUTS,														128.44 ea		<input type="checkbox"/>								
	ALTRONIX	ALT-SAV182D		CCTV POWER SUPPLY, 18 PTC CLASS 2														266.67 ea		<input type="checkbox"/>								
	ALTRONIX	ALT-SAV4D		CCTV POWER SUPPLY, 4 PTC CLASS 2														111.11 ea		<input type="checkbox"/>								

Import  
Export

## Product Utility

Scroll down to view field definitions.

8 of 8

Done

### Clean Products

Run this utility occasionally to clean carriage returns and blank spaces in your Product Library

### Delete Products

This Utility will Delete all of the Products in your Product Library. It will not affect Proposals and Projects.

### Find Duplicate Products

This Utility will find all of the Products in your Library that are duplicates

### Labor Updater

This utility updates each record in the Product Library with the current Labor Rates in the Set-Up file.

### Post Modified Dates

This utility posts the dates that each product was modified. This can assist at finding products that have been changed. If you go into the Find Product Screen you can enter a Date in the Modified field with a before < or after > symbol before the date and find all of the products that have been modified and then go to the print menu and print a report.

### Print Newly Added Product

Products are tagged as they are added to the library. This utility enables you to find and print all of the products added since you last deleted the Product Library for a new import. This report can then be used to add these new products into your bookkeeping software.

### Print Vendor List

This utility prints a list of all of the names of the vendor manufacturers in the product library.

### Print Orphaned Sets

This utility prints a list of any Sets in the Sets Library that have subset products in them but no longer have an associated product in the Product Library.



Scroll down to view field definitions.

Please Note: All Excel imports must be in the .xls format, not .xlsx  
Open the Excel file and save it as Excel 97-2003 Workbook (.xls) before using the Import Utilities.

Excel 97-2003 Workbook (\*.xls)



Save

**Import Product**

After clicking the button you will be asked if you want to delete all products in the Library. If you want to Import just ONE manufacturer at a time, you should go back to the Product Library Detail List and Find, Tag and Delete that Manufacturers products, and then do the import and DO NOT delete the Product Library.

*Importing  
Tab or Comma  
delimited file*

After importing you may want to print a Orphaned Product Set report to see which Sets in your Sets Library no longer has subset products to connect to. You can then reestablish them from the Sets Library.

**Print these  
Instructions &  
Field Definitions**

1. Click on "Import" button.
2. Locate and open the File containing the data you want to import.
3. At the "Import Mapping" screen;
  - a. For CPS Product files, set View By: to "Matching Names".
  - b. For other files align "data in" fields on the left with CPS data fields on the right. by clicking on a CPS field and dragging it up or down into the right position. Click on the arrow between the lists to insure that the data transfers.
4. Select "Add new records" and click on the "Import" button at the bottom of the screen.
5. Click on "OK" in the "Import Options" screen that appears.

**Import Products  
1**

These buttons can be used for importing and exporting of products and their field maps can be saved for repeated use.

**Export Products  
1**

This will create a file in your CPS folder named CPSQBin.v.iif

**Import  
SCPS Products****Export Products  
2**

This will create a file with Exported Products that you selected with a .FP5 file extension. It can then be Imported into SCPS from the Product Library/Utility/Import screen. Select the Products you want to Export prior to clicking the Export Products 2 button.

**Import  
QuickBooks**

These buttons can be used for importing and exporting of products to Quickbooks. Some Quickbooks formats will need to have the data groomed after importing.

**Print QuickBooks  
Instructions****Set Tax to T  
on all items****Export to  
QuickBooks****Update QB  
Accounts in  
Projects****Import Products from Snap AV****Import**

Import will update prices on products with the same Make and Model.  
Import will add products that do not exist in the Product Library.

Units will be auto set = ea



Excel file Format - Column Headers must be labeled as specified. Formatting (Underlined etc does not matter)


Item No.	Product Category	Sub Category	Item Description	Wholesale Price	MSRP	Quantity for Discount
ALT-ALTV248UL	Affiliate	Altronix	CCTV Power Supply, 8 Fus	\$79.95	\$128.44	1

Asset:

Income:


Cost Of Goods:

 Supplier: SnapAV 

Find Supplier 

## Proposal Contract: Salesman's Signature Option

You can now remove the Salesman's Signature from the Proposal Contract. This Setting is Global to all Proposal Contracts

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing Sub Totals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
<b>Other Defaults 7</b>							 Next Done
<b>Insert Default Text</b>	<b>Global Proposal Contract &amp; POS Invoice Text Line</b>						
This text is global to all Existing & New Propsoal Contracts and POS Quotes, Sales Invoices							
<b>Proposal Report Options</b>							
<input type="checkbox"/> Warehouse Pallet Report - Show SKU number instead of Phase <input checked="" type="checkbox"/> Contract - Salesmans Signature Line (Remove)							

## Electronics & Installation

**Courtesy Discount Applied -\$118**

Prices quoted are guaranteed until: 3/11/2021

Products & Installation prices are estimated.

Total price will consist of installed products & actual installation.

	<u>System Price</u>	<u>List Price</u>
Products & Install:	46,878.80	45,314.86
Parts & Materials:	5,784.74	7,230.96
Sub Total:	52,663.54	52,545.78
Tax:	2,184.74	
Grand Total:	54,848.28	

Date: \_\_\_\_\_

Jim Engandela

### Electronics & Installation

**Courtesy Discount Applied -\$118**

Prices quoted are guaranteed until: 3/11/2021

Products & Installation prices are estimated.  
Total price will consist of installed products &  
actual installation.

	<u>System Price</u>	<u>List Price</u>
<b>Products &amp; Install:</b>	<b>46,878.80</b>	45,314.86
<b>Parts &amp; Materials:</b>	<b>5,784.74</b>	<u>7,230.96</u>
<b>Sub Total:</b>	<b>52,663.54</b>	52,545.78
<b>Tax:</b>	<b>2,184.74</b>	
<b>Grand Total:</b>	<b>54,848.28</b>	

Date:

Jim Engandela

Date:

Warren Petryk - Audio & Video Specialist

S15700 Hwy U Strum, WI 54770 Ph: (715) 287-3335 Fax: (715) 287-4464






CPS 9.0v6

Proposal: Product Listing: Add Description-Finish



Proposal Text	Payment Terms	Other Defaults ?	Master Set-Up		Access	Proposal	Done
			Please use normal style text				
			<div style="display: flex; justify-content: space-between;"> <div> <b>Company Name:</b> EME Audio &amp; Video Systems  <b>Address:</b> S15700 Hwy U  <b>City:</b> Strum  <b>State:</b> WI <b>Zip:</b> 54770   <b>Phone:</b> (715) 287-3335  <b>Fax:</b> (715) 287-4464   <b>Permit #</b> Permit: 1234                 </div> <div> <b>CPS</b>   <b>Pure</b>  <b>Address</b>  <b>City</b>  <b>State</b>  <b>Buyer</b> </div> </div>				
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Switch Company</div>							
RATES			SERVICES				
<div style="display: flex; justify-content: space-between; font-size: small;"> <span>Hourly</span> <span>Cost</span> <span>Sell</span> <span>List</span> </div> <b>Install Labor:</b> \$50 \$70 \$80  <b>Misc Parts Charge:</b> <input type="text" value="5%"/> of Equip <div style="display: flex; justify-content: space-between; font-size: small;"> <span>A</span> <span>Tax Rates</span> <span>B</span> </div> <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="radio"/> 1 <input type="text" value="5.000%"/>  <input type="radio"/> 2 <input type="text" value="0.000%"/>  <input type="radio"/> 3 <input type="text" value="0.000%"/> </div> <div>             Installed              Added.....              Compound           </div> <div> <input type="text" value="0.000%"/>  <input type="text" value="0.000%"/>  <input type="text" value="0.000%"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <input type="text" value="YES"/> <b>Tax Labor</b>  <input type="text" value="YES"/> <b>Tax Misc Parts</b>   <input type="checkbox"/> <b>Tax 2 AB Override Option</b> </div> <div style="font-size: small;">             Taxed items (T) =              Tax A on the Sell price and Tax B will be 0               Installed items (I) =              Tax A will be 0 and Tax B will be on the Cost           </div> </div>			<div style="display: flex; justify-content: space-between;"> <div> <b>Extra Warranty?</b> <input type="radio"/> YES <input checked="" type="radio"/> NO  <b>Charge Client?</b> <input type="radio"/> YES <input checked="" type="radio"/> NO   <b>On-Site Service?</b> <input type="radio"/> YES <input checked="" type="radio"/> NO  <b>Charge Client?</b> <input type="radio"/> YES <input checked="" type="radio"/> NO   <b>Tax Services</b> <input type="radio"/> YES <input type="radio"/> NO              Services are Added to Misc Parts   <b>Suggested Referral Bonus</b> <input type="text" value="5.0%"/>  <b>Charge Client?</b> <input type="radio"/> YES <input checked="" type="radio"/> NO           </div> <div> <input type="text" value="4%"/> of Equip   <input type="text" value="2%"/> of Equip           </div> </div>				
					<div style="border: 1px solid black; padding: 2px;"> <input checked="" type="checkbox"/> A Make-Model-Cat-Desc-Fin              B Make-Model-Cat-Desc              C Make-Model-Cat-Fin              D Make-Model-Cat              E Make-Model-Desc-Fin              F Make-Model-Desc              G Make-Description              H Description              I Description-Cat              J Description-Fin              Description-Cat-Fin              L Description-Model-Fin              M Make-SKU-Cat-Desc-Fin              N Make-SKU-Cat-Desc              O Make-SKU-Cat-Fin              P Make-SKU-Cat              Q Make-SKU-Desc-Fin              R Make-SKU-Desc              S Make-SKU              T Make-Model-SKU-Cat-Desc-Fin              U Make-Model-SKU-Description              V Make-Cat-Desc-Fin   <div style="border: 1px solid black; padding: 2px;">A Make-Model-Cat-Desc-Fin</div> </div>		

Project	Purchasing	Proposal Detail			Pricing	Done
Areas	Work Orders	Jim Engandela Horizon Software			Set Up	Change Orders
Products	Invoicing	 ?	1001-00	 	Tracker	Print Menu
Selected Phase	<b>Sold</b> <b>Done</b>	Products: \$43,694.80	Install: \$3,184.00	Misc: \$5,784.74	Subtotal:	\$52,663.54
All Phases	<input type="checkbox"/> <input type="checkbox"/>	HP: \$384.50	Hours: 55.0	GP: 39.7%	Grand Total:	\$54,848.28
<b>SYSTEM DESIGN</b> This proposal represents a design carefully prepared with your requirements,						
<b>DEN</b> This proposal represents a design carefully prepared with your requirements, our						
1 ea	MOVING-COIL CARTRIDGE - ARKIV					2,200.00
1 ea	- EKOS BLACK					2,695.00
1 ea	REMOTE CONTROL CD PLAYER - IKEMI BLACK					3,595.00
4m	TRI-WIRE SPEAKER CABLE/METRE - K600 CABLE					136.00
1 pr	CHERRY/ROSENUT (INC. 32 ACTIV CARDS - KEILIDH AKTIV (3-WAY) -					2,020.00
1 ea	REMOTE CONTROL PREAMPLIFIER - KOLEKTOR BLACK					990.00
1 ea	POWER SUPPLY 33/45 RPM - LINGO BLACK					1,550.00
1 ea	DIRECT COUPLED PRECISION PHONO PREAMPLIFIER - LINTO BLACK					1,600.00
3 ea	STEREO POWER AMPLIFIER - LK 85 BLACK					2,685.00
4 pr	RCA INTERCONNECTS 1.2M - SILVER INTERCONNECT CABLES SILVER					1,200.00

Proposal: Increase Product Features Field Size

Jim Engandela - Horizon Software  
Custom Audio & Video System

Proposal: 1001-00

1/28/2021 Section: 2 Page: 1

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**EME AUDIO & VIDEO SYSTEMS**

---

**PRODUCT SUMMARY**

- 2 ea MOVING-COIL CARTRIDGE - ARKIV  
The reference moving-coil cartridge for the vinyl enthusiast.
- 2 ea - EKOS BLACK  
Dynamically balanced precision tonearm manufactured to sub-micron tolerances to get the most music from any cartridge.
- 2 ea REMOTE CONTROL CD PLAYER - IKEMI BLACK  
CD player with Linn proprietary "2D" signal processing derived from top CD12 technology for lowest possible jitter.
- 4 m TRI-WIRE SPEAKER CABLE/METRE - K600 CABLE  
High quality low-loss loudspeaker cable specifically designed for tri-wired installations.
- 2 pr CHERRY/ROSENUT (INC. AKTIV CARDS - KEILIDH AKTIV (3-WAY) - CHERRY/ROSENUT CHERRY OR ROSENUT  
Versatile floor-standing loudspeaker delivering an outstanding level of performance and value with a wide range of source, control and playback equipment.
- 1 pr STANDS (PAIR) - KEILIDH/KABER STAND





Add Area		Pick Sets		Proposal Product Detail		Done	
Add Product		Pick Products		Jim Engandela - Horizon Software		Areas Products	
Add product to Product Library		Pick		DEN			
Qty	Make:	LINN		Department:			
1	Model:	IKEMI		SKU#:			
Category:		COMPACT DISC PLAYER		Location:			
Description:		REMOTE CONTROL CD PLAYER		Supplier:		LINN PRODUCTS	
Features:		CD player with Linn proprietary "2D" signal processing derived from top CD12 technology for lowest possible jitter.		Parts:			
Tax:		T		No Labor Tax		<input type="checkbox"/>	
Phase:		0		Placement:		n	
Unit	Cost:	2,157.00	PO Cost	2,157.00	GP%:	40.0%	EA W/ADJUST
EA	Sell:	3,595.00	Set Sell Calc	0.0%	Price Calc	ACTUAL SELL:	3,595.00 3,595.00
List:	3,595.00	INSTALLATION:		70.00	70.00		
Installation:		60.00	Min.Sec	Hours to Min	\$70.00/Hour	INSTALLED PRICE:	3,665.00 3,665.00

Upgrade Utility: Storage Value List Info

<b>Value List Storage</b> Save your Value Lists and Copy/Paste them after Upgrading						Add Area Pick Sets Proposal Product Detail Done Add Product Pick Products Jim Engandela - Horizon Software Areas Products Add product to Product Library Pick DEN					
PROJECT DESCRPT: Custom Audio & Video System SALESMAN: Warren Petryk TITLE: Audio & Video Specialist						PROJECT MGR: BID NUMBER:					
Pick Text Add to Text Library Clear Area Text Proposal Area Spell Check Done Jim Engandela - Horizon Software Text Ruler						Installation: Min.Sec Hours to Min \$70.00/Hour INSTALLED PRICE:					
ZONE: 0 AREA: PICK OR TYPE AREA NAME Placement: n						Mine Parts: Amt Weight Rack Spaces: Finish:					
Wire Type: 1 Good AC Consumption: W: H: D:						Amount: 0.00 DC Consumption: Warranty:					
Project Description		Salesman		Salesman Title		Area Name		Warranty		Finish	

CPS 9.0v5

Proposal/Contract: Increase Courtesy Discount

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	<b>Defaults 5 Pricing SubTotals</b>	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text		Example Shown Below		<b>Other Defaults 5</b> Please stay within field borders			?  Next Done

**Proposal Price Guarantee**

The text shown is based on the Prices Quoted Are: settings in Set-Up screen.

Estimated	Guaranteed
Products & Installation prices are estimated. Total price will consist of installed products & actual installation.	Products & Installation prices are guaranteed. Total price will not exceed the quoted price.

**Proposal Project & Contract Pricing Labels**

These are Global settings for all Proposals currently made.

	Sell Price Label System Price	List Price Label List Price	
Use ":" at end of label			
Products:	Products:	\$10,000.00	\$13,000.00
Labor:	Installation:	\$2,000.00	\$3,000.00
Products + Installation:	Products & Install:	\$12,000.00	\$16,000.00
Other Labor:	Other Labor:		
Regular:	Parts & Materials:	\$500.00	\$750.00
Parts & Services:	Extra: Parts & Services:		

Discount Label

Courtesy Discount Applied

### Electronics & Installation

**Courtesy Discount Applied -\$118**

Prices quoted are guaranteed until: 1/14/2021

Products & Installation prices are estimated.

Total price will consist of installed products &  
actual installation.

Date: \_\_\_\_\_

Jim Engandela

	<u>System Price</u>	<u>List Price</u>
Products:	43,694.80	41,676.00
Installation:	3,184.00	3,638.86
Parts & Materials:	5,784.74	7,230.93
<b>Sub Total:</b>	<b>52,663.54</b>	<b>52,545.78</b>
<b>Tax:</b>	<b>2,184.74</b>	
<b>Grand Total:</b>	<b>54,848.28</b>	

All Databases Files: Main Logo Screen Button

# HORIZON SOFTWARE

Always use the Exit button on the main logo screen to exit CPS. Click on the Horizon logo to exit CPS.

**Return to Main Logo Screen**



## Proposals/Archive: Multi-Archive Proposals

You can now Archive Multiple Proposals/Projects at one time.

<b>Multi Archive</b> ?		<b>Select a Proposal or Project to Archive</b>					<b>Done Cancel</b>	
<i>Multi Archive</i>	<i>Sold</i>	<i>Done</i>	<i>BY DATE</i>	<i>#</i>	<i>#</i>	<i>CLIENT</i>	<i>COMPANY</i>	<i>PROJECT</i>
<input type="checkbox"/>	<input type="checkbox"/>		12-11-20	1003-00		NEW BUILD,		
<input type="checkbox"/>	<input type="checkbox"/>		WP	3-2-05	1001-00	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO &

CPS 9.0v4

## Proposal/Print Menu: Warehouse Pallet with Cost



<div> <b>Main Print Menu</b> </div> <div> <b>EME Audio &amp; Video Systems</b>          Jim Engandela          Horizon Software          Custom Audio &amp; Video System          PROPOSAL: 1001-00       </div> <div> <b>Done</b> </div> <div> <b>Custom Proposals</b> </div> <div> <b>Dealer Proposals</b> </div> <div> <div>Selected Phase</div> <div>All Phases</div> </div> <div> <table border="1"> <tr> <td>Area Text</td> <td>Prod Text</td> <td>List Price</td> <td>Sales Tax</td> </tr> <tr> <td>Y</td> <td>S</td> <td>Y</td> <td>Y</td> </tr> </table> </div> <div> <div>A Make-Model-Cat-Desc-Fin</div> <div>Prices Guaranteed</div> <div>From: 11-23-20</div> <div>For: 30 Days</div> <div>Until: 12-23-20</div> <div>Proposal Date</div> <div>11/23/20</div> <div>Creation Date</div> <div>Printer Setup</div> <div>Show Print Dialog</div> </div>	Area Text	Prod Text	List Price	Sales Tax	Y	S	Y	Y	<div> <b>Store Reports</b> </div> <div> <b>ViewPrint</b> </div> <div> <input type="checkbox"/> <input type="checkbox"/> Project Job Costing  <input type="checkbox"/> <input type="checkbox"/> Products @ Cost  <input type="checkbox"/> <input type="checkbox"/> Products @ Cost-Dept  <input type="checkbox"/> <input type="checkbox"/> Products by Phase  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Product Status  <input type="checkbox"/> <input type="checkbox"/> Product Specs  <input type="checkbox"/> <input type="checkbox"/> P.O.'s  <input type="checkbox"/> <input type="checkbox"/> P.O. Summary  <input type="checkbox"/> <input type="checkbox"/> P.O. - CO Summary  <input type="checkbox"/> <input type="checkbox"/> Bid Submittal <b>Cost</b>  <input type="checkbox"/> <input type="checkbox"/> Warehouse Pallet  <input type="checkbox"/> <input type="checkbox"/> Product Sold Stickers  <div>No Breaks</div> <input type="checkbox"/> <input type="checkbox"/> Work Order  <input type="checkbox"/> <input type="checkbox"/> Work Order (Detail)  <input type="checkbox"/> <input type="checkbox"/> Work Order (Special)  <input type="checkbox"/> <input type="checkbox"/> Install Sales Invoice  <input type="checkbox"/> <input type="checkbox"/> Project Sales Invoice  <input type="checkbox"/> <input type="checkbox"/> Blank Change Order  <input type="checkbox"/> <input type="checkbox"/> Blank Quality Control  <input type="checkbox"/> <input type="checkbox"/> Mailing Labels  <input type="checkbox"/> <input type="checkbox"/> Project Reconciliation       </div>	<div> <b>1st Draft Client Proposals</b> </div> <div> <b>Done</b> </div> <div> <div> <b>Product &amp; Install Prices Separate</b>  <b>Entire Proposal</b>  </div> <div> <b>Product &amp; Install Prices Combined</b>  <b>Entire Proposal</b>  </div> </div> <div> <div> <b>Proposal Sections</b>  <b>view print</b>  <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project Info  <input type="checkbox"/> <input type="checkbox"/> Contract         </div> <div> <b>Proposal Sections</b>  <b>view print</b>  <input type="checkbox"/> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> <input type="checkbox"/> Product Summary  <input type="checkbox"/> <input type="checkbox"/> Area Summary  <input type="checkbox"/> <input type="checkbox"/> Project  <input type="checkbox"/> <input type="checkbox"/> Contract         </div> </div> <div> <div> <b>Additional Proposal Sections</b>  <b>view print</b>  <input type="checkbox"/> <input type="checkbox"/> Letterhead Cover Pages  <input type="checkbox"/> <input type="checkbox"/> Area/Product Prices - No Area Text  <input type="checkbox"/> <input type="checkbox"/> Area Summary with tax <input type="checkbox"/> <input type="checkbox"/> w/Parts Labor  <input type="checkbox"/> <input type="checkbox"/> Extra Text Pages <input type="checkbox"/> <input type="checkbox"/> Editable Extra Page  <input type="checkbox"/> <input type="checkbox"/> Extra Contract Page  <input type="checkbox"/> <input type="checkbox"/> Technical Services Page  <input type="checkbox"/> <input type="checkbox"/> Follow-Up Letters  <input type="checkbox"/> <input type="checkbox"/> Scope of Work Page         </div> </div>
Area Text	Prod Text	List Price	Sales Tax							
Y	S	Y	Y							

Jim Engandela  
Horizon Software  
S. 15700 Hwy U.  
Strum, WI 54770

# Warehouse Pallet List

11/23/20 Page: 1

Proposal: 1001-00

Project Mgr:

## EME Audio & Video Systems

Proposal Phases Presented: All Phases

1 - Prewire Phase

12-1-05

Qty	Product Description	Unit Cost	Phase	Wire	X Complete	Serial #
2 ea	LINN - ARKIV - CARTRIDGE - MOVING-COIL CARTRIDGE	\$1,500.00	0	1 Good		
2 ea	LINN - EKOS - TONEARM BLACK	\$1,617.00	0	1 Good		
2 ea	LINN - IKEMI - COMPACT DISC PLAYER - REMOTE CONTROL CD PLAYER BLACK	\$2,157.00	0	1 Good		
4 m	LINN - K600 CABLE - ACCESSORIES - TRI-WIRE SPEAKER CABLE/METRE	\$20.40	0	1 Good		
2 pr	LINN - KEILIDH AKTIV (3-WAY) - CHERRY/ROSENUIT - LOUDSPEAKER - CHERRY/ROSENUIT (INC. AKTIV CARDS	\$1,212.00	0	1 Good		
1 pr	LINN - KEILIDH/KABER STAND - LOUDSPEAKER UPGRADES - STANDS (PAIR) GREY	\$138.00	0	1 Good		
2 ea	LINN - KOLEKTOR - CONTROL AMPLIFIER - REMOTE CONTROL PREAMPLIFIER BLACK	\$594.00	0	1 Good		
2 ea	LINN - LINGO - LP 12 UPGRADES - POWER SUPPLY 33/45 RPM BLACK	\$930.00	0	1 Good		
2 ea	LINN - LINTO - LP 12 UPGRADES - DIRECT COUPLED PRECISION PHONO PREAMPLIFIER BLACK	\$960.00	0	1 Good		
6 ea	LINN - LK 85 - POWER AMPLIFIER - STEREO POWER AMPLIFIER BLACK	\$537.00	0	1 Good		
8 pr	LINN - SILVER INTERCONNECT CABLES - ACCESSORIES - RCA INTERCONNECTS 1.2M SILVER	\$180.00	0	1 Good		
2 ea	LINN - SONDEK LP-12 - CHERRY, WALNUT OR ROSENUIT - TURNTABLE - MECHANICAL USE ONLY - NO BASEBOARD OR POWER SUPPLY	\$1,125.00	0	1 Good		
2 ea	LINN - TRAMPOLIN BASE - LP 12 UPGRADES - BASE BOARD FOR LP 12	\$147.00	0	1 Good		
1 ea	YAMAHA - DVD-C750 - SOURCE - 5 DISC DVD CHANGER	\$211.00		1 Good		
4 ea	YAMAHA - MCX-C15 - SOURCE - IN-WALL CLIENT FOR MUSICAST CD RECORDER	\$260.00		1 Good		



<div style="text-align: center; font-weight: bold; font-size: 1.2em;">Main Print Menu</div> <div style="text-align: center; font-size: 0.8em;">EME Audio &amp; Video Systems</div> <div style="text-align: center; font-size: 0.8em;">Jim Engandela Horizon Software Custom Audio &amp; Video System PROPOSAL: 1001-00</div> <div style="text-align: center; background-color: #FFDAB9; padding: 5px; margin: 5px 0;">Done</div> <div style="text-align: center; background-color: #FFB6C1; padding: 5px; margin: 5px 0;">Custom Proposals</div> <div style="text-align: center; background-color: #FFD700; padding: 5px; margin: 5px 0;">Dealer Proposals</div> <div style="text-align: center; background-color: #90EE90; padding: 5px; margin: 5px 0;">Selected Phase All Phases</div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.7em;"> <tr> <th style="text-align: left;">Area</th> <th style="text-align: left;">Prod</th> <th style="text-align: left;">List</th> <th style="text-align: left;">Sales</th> </tr> <tr> <td>Text</td> <td>Text</td> <td>Price</td> <td>Tax</td> </tr> <tr> <td>Y</td> <td>S</td> <td>Y</td> <td>Y</td> </tr> </table> <div style="background-color: #FFB6C1; padding: 5px; margin: 5px 0; font-size: 0.8em;">A Make-Model-Cat-Desc-Fin</div> <div style="font-size: 0.8em;">       Prices Guaranteed        From: 12-11-20        For: 30 Days        Until: 1-10-21        Proposal Date        12/11/20     </div> <div style="text-align: center; background-color: #FFD700; padding: 5px; margin: 5px 0;">Creation Date</div> <div style="text-align: center; background-color: #FFD700; padding: 5px; margin: 5px 0;">Printer Setup</div> <div style="font-size: 0.8em;"> <input type="checkbox"/> Show Print Dialog     </div> <div style="text-align: center; background-color: #FFD700; padding: 5px; margin: 5px 0;">Free PDF App</div>	Area	Prod	List	Sales	Text	Text	Price	Tax	Y	S	Y	Y	<div style="text-align: center; font-weight: bold; font-size: 1.2em;">Store Reports</div> <div style="text-align: center; font-size: 0.8em;">View Print</div> <div style="font-size: 0.8em;"> <input type="checkbox"/> Project Job Costing  <input type="checkbox"/> Products @ Cost  <input type="checkbox"/> Products @ Cost-Dept  <input type="checkbox"/> Products by Phase  <input type="checkbox"/> Product Summary  <input type="checkbox"/> Product Status  <input type="checkbox"/> Product Specs     </div> <hr/> <div style="font-size: 0.8em;"> <input type="checkbox"/> P.O.'s  <input type="checkbox"/> P.O. Summary  <input type="checkbox"/> P.O. - CO Summary  <input type="checkbox"/> Bid Submittal <span style="float: right;">Cost</span>  <input type="checkbox"/> Warehouse Pallet  <input type="checkbox"/> Product Sold Stickers     </div> <div style="text-align: right; font-size: 0.7em;">No Breaks</div> <div style="font-size: 0.8em;"> <input type="checkbox"/> Work Order  <input type="checkbox"/> Work Order (Detail)  <input type="checkbox"/> Work Order (Special)  <input type="checkbox"/> Install Sales Invoice  <input type="checkbox"/> Project Sales Invoice  <input type="checkbox"/> Blank Change Order  <input type="checkbox"/> Blank Quality Control     </div> <hr/> <div style="font-size: 0.8em;"> <input type="checkbox"/> Mailing Labels  <input type="checkbox"/> Project Reconciliation     </div>	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="font-size: 0.8em;">1st Draft</div> <div style="text-align: center; font-weight: bold; font-size: 1.5em;">Client Proposals</div> <div style="text-align: right; background-color: #FFDAB9; padding: 5px;">Done</div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <div style="text-align: center; font-weight: bold; font-size: 1.1em;">Product &amp; Install Prices Separate <u>Entire Proposal</u></div> <div style="text-align: center; font-size: 0.8em;"> </div> <div style="text-align: center; font-size: 0.8em;"><u>Proposal Sections</u></div> <div style="font-size: 0.8em;"> <div style="text-align: center; font-size: 0.7em;">view print</div> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> Product Summary  <input type="checkbox"/> Area Summary  <input type="checkbox"/> Project Info  <input type="checkbox"/> Contract         </div> </div> <div style="width: 48%;"> <div style="text-align: center; font-weight: bold; font-size: 1.1em;">Product &amp; Install Prices Combined <u>Entire Proposal</u></div> <div style="text-align: center; font-size: 0.8em;"> </div> <div style="text-align: center; font-size: 0.8em;"><u>Proposal Sections</u></div> <div style="font-size: 0.8em;"> <div style="text-align: center; font-size: 0.7em;">view print</div> <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> Product Summary  <input type="checkbox"/> Area Summary  <input type="checkbox"/> Project  <input type="checkbox"/> Contract         </div> </div> </div> <hr/> <div style="text-align: center; font-size: 0.8em;"><u>Additional Proposal Sections</u></div> <div style="font-size: 0.8em;"> <div style="text-align: center; font-size: 0.7em;">view print</div> <input type="checkbox"/> Letterhead Cover Pages  <input type="checkbox"/> Area/Product Prices - No Area Text  <input type="checkbox"/> Area Summary with tax <input type="checkbox"/> w/Parts Labor  <input type="checkbox"/> Extra Text Pages <input type="checkbox"/> Editable Extra Page  <input type="checkbox"/> Extra Contract Page  <input type="checkbox"/> Technical Services Page  <input type="checkbox"/> Follow-Up Letters  <input type="checkbox"/> Scope of Work Page     </div> <div style="font-size: 0.8em; margin-top: 10px;"> <input type="checkbox"/> Show Proposal Total Amount on Cover page  <input type="checkbox"/> Export Project Sales Invoice to Excel     </div>
Area	Prod	List	Sales											
Text	Text	Price	Tax											
Y	S	Y	Y											

These proposals print one area per page.

Custom proposals print without page breaks between areas.

**View**  
Click "view" button.  
Use the Rolodex icon in the upper left corner of the window to step through report pages.  
Click on "Continue" button to return.

**Paste Proposal Name into a PDF Document**  
Put your Curser in the File Name field and Press Control & V to paste the Proposal Number & Name.



All 4 list screens

Find Proposals Fav All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																									
Archive		Create a new Proposal	Proposals																		Done				
Duplicate																					Projects				
Delete			4	Click on a proposal to view																		ProposalTracker			
Fav Rep Proposal Date Client Company Project Amt												PROPOSAL NUMBER		FIND PROPOSAL AREA?											
<input type="checkbox"/>	WP	1004-00	3-2-2005	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO & VIDEO	\$53,880	100400		10040080467															
<input type="checkbox"/>	WP	1003-02	3-2-2005	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO & VIDEO	\$53,880	100302		100300625416															
<input type="checkbox"/>	WP	1003-00	3-2-2005	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO & VIDEO	\$53,880	100300		100300290169															
<input type="checkbox"/>	WP	1001-00	3-2-2005	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO & VIDEO	\$53,880	100100		100100628834															

Project		Purchasing		Proposal Detail				Pricing		Done	
Areas		Work Orders		Jim Engandela Horizon Software				Set Up		Change Orders	
Products		Invoicing		1004-00				Tracker		Print Menu	
Selected Phase		Sold Done		Products: \$42,042.00		Install: \$3,534.00		Misc: \$6,202.10		Subtotal: \$51,778.10	
All Phases				HP: \$347.25		Hours: 60.0		GP: 39.8%		Grand Total: \$53,880.20	
SYSTEM DESIGN This proposal represents a design carefully prepared with your requirements,											
DEN This proposal represents a design carefully prepared with your requirements, our											
1 per LNN - ARKIV - CARTRIDGE - MOVING-COIL CARTRIDGE 2 200.00											

util.resetFindProposalArea?2020

PROPOSAL NUMBER	PREVIOUS NUMBER	FIND PROPOSAL AREA?	zoneArea.c
100400	1003000000000	10040080467	SYSTEM DESIGN
100400	1004000000000	100400092249	0/Den
100400	1004000000000	100400092249	0/Den



Proposal 1001-08

Permit: 1234

10/20/2020 Section: 5 Page: 1

**EME AUDIO & VIDEO SYSTEMS****Jim Engandela - Horizon Software  
Custom Audio & Video System**Vendor: S. 15700 Hwy U.  
Strum, WI 54770

Work: 715-287-3335

Fax: 715-287-4464

**Agreement**

Electronic Design Associates will provide the equipment and the design and installation services described in this proposal. Changes to this proposal will require a written or verbal change order and prices will be revised in accordance with these changes. EDA requires a 10 day notice prior to the start of each phase of the installation. Payments must be made in accordance with the terms of this proposal in order to meet the installation dates specified in this proposal.

**Guarantee**

System includes a one year parts & labor warranty.  
Warranty covers manufacturing defects, not misuse or normal wear.  
Installation workmanship is guaranteed for one year.  
Optional on-site technical support service is available.

**Payment Terms**

50% Deposit due upon acceptance	\$13,593.55
40% Payment due before finish phase	\$10,874.84
10% Payment due upon completion	\$2,718.71 Estimated

**Electronics & Installation****Courtesy Discount \$1,058**

Prices quoted are guaranteed until: 11/19/2020

Products &amp; Installation prices are estimated.

Total price will consist of installed products &amp; actual installation.

	<u>System Price</u>	<u>List Price</u>
Products:	21,021.00	21,021.00
Installation:	2,064.00	2,358.86
Parts & Materials:	3,051.05	3,813.81
Sub Total:	26,136.05	27,193.67
Tax:	1,051.05	
Grand Total:	27,187.10	

Date: \_\_\_\_\_  
Jim Engandela

Note: Prices are based on cash. Credit card payments will incur an additional 3.5 % convenience charge.

S15700 Hwy U Strum, WI 54770 Ph: (715) 287-3335 Fax: (715) 287-4464

4 layouts





## Proposal/Project/Completed Lists: Redesign

Move Fav's to left side

Sort Fav's

Separate Fields for better clarity

Remove Done checkboxes



Find Proposals	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Archive	Create a new Proposal	Proposals																				Done						
Duplicate																						Projects						
Delete		? 4	Click on a proposal to view															 	ProposalTracker									
Fav	Rep	Proposal	Date	Client				Company				Project				Amt												
<input type="checkbox"/>		1004-00		A TEMPLATE, 3X6												\$0												
<input checked="" type="checkbox"/>	WP	1003-00	3-2-2005	ENGANDELA, JIM				HORIZON SOFTWARE				CUSTOM AUDIO & VIDEO				\$65,033												
<input checked="" type="checkbox"/>	WP	1001-08	3-2-2005	ENGANDELA, JIM				HORIZON SOFTWARE				CUSTOM AUDIO & VIDEO				\$27,187												
<input checked="" type="checkbox"/>	WP	1001-00	3-2-2005	ENGANDELA, JIM				HORIZON SOFTWARE				CUSTOM AUDIO & VIDEO				\$65,033												

CPS 9.0v1 - 10k

Proposal Number Increase: From 1000 to 10,000

CPS can now generate and duplicate Proposals beyond the 1000 limit, up to a maximum of 10,000



Find Proposals	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Archive	<div>Proposals</div> <div>Click on a proposal to view</div> <div></div>																					Done						
Duplicate																						Projects						
Delete																						ProposalTracker						
Create a new Proposal		?		5																								
Proposal Date		Client		Company		Project		Rep		Amt		Done		Fav														
10002-00		A TEMPLATE, 1X6										\$47,726		<input type="checkbox"/>		<input type="checkbox"/>												
10001-00		10-6-2020 SIMMONS, MIKE		WESTERN SALES &								\$400		<input type="checkbox"/>		<input type="checkbox"/>												
9998-01		10-6-2020 ENGANDELA, JIM		HORIZON SOFTWARE		CUSTOM AUDIO & VIDEO						\$391		<input type="checkbox"/>		<input type="checkbox"/>												
9998-00		10-6-2020 ENGANDELA, JIM		HORIZON SOFTWARE		CUSTOM AUDIO & VIDEO						\$391		<input type="checkbox"/>		<input type="checkbox"/>												
9997-00		A TEMPLATE, 1X6										\$47,726		<input type="checkbox"/>		<input type="checkbox"/>												

Setup: Proposal Numbers: New Process Screen

## PROPOSAL STARTING NUMBER

### Read Instructions Carefully

The CPS System can create proposals beginning with any number from 1,000 to 10,000. If you are using multiple copies of the CPS system on various computers, it is best to start each copy out in 1000 increments. By doing this you can easily tell which computer a proposal was made on and you can merge any of these proposals together into one computer if you wish.

1

1. Click **Button 1** only if you want to make a copy of your CPS Proposals. Otherwise skip to button 2. File name: CPSCopy.FP3

2

2. Click **Button 2** to delete all proposals from the CPS System.

3. Replace the 4 digits of the **NEW NUMBER** with a proposal number above 1000

Example 1000

NEW NUMBER:

4

4. Click **Button 4** to create a proposal template that will appear in the Proposal List . Please wait a few moments to complete processing.

Cancel

## Proposal List: Date and Description

The date has been expanded to show 2020 instead of 20

You can now click on the Project Description field to expand it.

Proposal	Date	Client	Company	Project	Rep	Amt	Done	Fav
9998-00	10-6-2020	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO & VIDEO		\$391	<input type="checkbox"/>	<input type="checkbox"/>
9997-00		A TEMPLATE, 1X6		SYSTEM		\$47,726	<input type="checkbox"/>	<input type="checkbox"/>

## Proposal/Print Menu: No Areas & Products Trap

When entering the Print Menu, you will be prompted if there are no Areas and Products in your Proposal.

Project	Purchasing	Proposal Detail	Pricing	Done
Areas	Work Orders	New Build	Set Up	Change Orders
Products	Invoicing	10002-00	Tracker	Print Menu

Selected Phase: All Phases  
Sold: ☐ Done: ☐  
Products: HP: ☐ Install: \$0.00 Misc: \$0.00 Subtotal: \$0.00  
Hours: GP: ? Grand Total: \$0.00

SYSTEM DESIGN A carefully engineered distributed audio system will provide music listening

Message

**There are no Areas and Products to Print.**

OK

## Proposal List: Posted Total with Sales Tax

When leaving a Proposal or Project the Total that is posted on the List screens now shows Total with Tax if the Proposal is Taxed and without Tax if the Proposal is not Taxed.


Please note: Proposal Totals are not Posted to the List when exiting a Proposal with the Fast Exit button.



Find Proposals		Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Archive	Create a new Proposal	<h1>Proposals</h1> <p>Click on a proposal to view</p>																				Done							
Duplicate																						Projects							
Delete																						ProposalTracker							
Proposal	Date	Client	Company	Project	Rep	Amt	Done	Fav																					
1001-10	3-2-05	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO & VIDEO	WP	\$56,099	<input type="checkbox"/>	<input type="checkbox"/>																					
1001-00	3-2-05		CAPITOL SALES COMPANY	CUSTOM AUDIO & VIDEO	WP	\$51,778	<input type="checkbox"/>	<input type="checkbox"/>																					

Proposal/Pick Contact: Set instead of Paste

When Picking a Contact into a Proposal the Contact Key is now set into a Global instead of being Pasted. This improves the reliability of this routine.

Install Details	Related Contacts	29 ?	Proposal Project Details Please use normal case text				Add Client to Contacts	Done
		Salutation	First Name	Last Name	Pick Contact	Proposal: 1001-10		
CLIENT:		Jim	Engandela		Created: 3-2-05			
COMPANY:		Horizon Software			Modified: 10-6-20			
VENDOR:	ADDRESS:	S. 15700 Hwy U.			HOME PHONE:			
	CITY:	Strum			WORK: 715-287-3335			
	ST:	WI			MOBILE:			
	COUNTRY:	ZIP: 54770			PAGER:			
ADDRESS:	ADDRESS:				FAX: 715-287-4464			
	CITY:				E-MAIL: horizonse@triwest.net			
	ST:	ZIP:			REFERRED BY:			
	COUNTRY:							

Version 8.5v1

Proposal/Pricing Menu: Add Free PDF ReDirect Link



### Main Print Menu

EME Audio & Video Systems

Jim Engandela

Horizon Software

Custom Audio & Video System

PROPOSAL: 1001-00

**Done**

**Custom Proposals**

**Dealer Proposals**

Selected Phase

All Phases

Area	Prod	List	Sales
Text	Text	Price	Tax
Y	S	Y	Y

A Make-Model-Cat-Desc-Fin

Prices Guaranteed

From: 12-11-20

For: 30 Days

Until: 1-10-21

Proposal Date

12/11/20

**Creation Date**

**Printer Setup**

☐ Show Print Dialog

**Free PDF App**

### Store Reports

ViewPrint

- ☐ Project Job Costing
- ☐ Products @ Cost
- ☐ Products @ Cost-Dept
- ☐ Products by Phase
- ☐ Product Summary
- ☐ Product Status
- ☐ Product Specs
- ☐ P.O.'s
- ☐ P.O. Summary
- ☐ P.O. - CO Summary
- ☐ Bid Submittal ☐ Cost
- ☐ Warehouse Pallet ☐
- ☐ Product Sold Stickers
- ☐ Work Order ☐ No Breaks
- ☐ Work Order (Detail)
- ☐ Work Order (Special)
- ☐ Install Sales Invoice
- ☐ Project Sales Invoice
- ☐ Blank Change Order
- ☐ Blank Quality Control
- ☐ Mailing Labels
- ☐ Project Reconciliation

1st Draft

### Client Proposals

**Done**

#### Product & Install Prices Separate

Entire Proposal

#### Product & Install Prices Combined

Entire Proposal

#### Proposal Sections

view print

- ☐ CPS Cover Page
- ☐ Areas & Products
- ☐ Product Summary
- ☐ Area Summary
- ☐ Project Info
- ☐ Contract

#### Additional Proposal Sections

view print

- ☐ Letterhead Cover Pages
- ☐ Area/Product Prices - No Area Text
- ☐ Area Summary with tax ☐ w/Parts Labor
- ☐ Extra Text Pages ☐ Editable Extra Page
- ☐ Extra Contract Page
- ☐ Technical Services Page
- ☐ Follow-Up Letters
- ☐ Scope of Work Page

These proposals print one area per page.

Custom proposals print without page breaks between areas.

**View**

Click "view" button.

Use the Rolodex icon in the upper left corner of the window to step through report pages.

Click on "Continue" button to return.

**Paste Proposal Name into a PDF Document**

Put your Curser in the File Name field and Press Control & V to paste the Proposal Number & Name.

Version 8.4v1

CPS: Incorporate SCPS Secure FM into CPS

FileMaker Pro - [cps.Setup.fp5]

File Edit View Insert Format Records Scripts Window Help

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
-------------------------------	----------------------------	-----------------------------	--------------------------------	---------------------------------	-------------------------------	---------------------------	----------------------------

Replace Fields with Default Text   Multi Company   **Other Defaults 1**   ?   Next   Done

### CPS System Settings

**Run CPS in Secure Mode**

It is **recommended** that you run CPS in the Secured Mode during the normal operation of the Custom Proposal System to prevent accidental misuse the program.

**Enable FileMaker Menus**

**Please Note:** In order for this feature to work it is necessary to

1. Copy the file named **Securefm.fmx** from the CPS Plugin folder into the Program Files/FileMaker/System folder.
3. Then restart FileMaker and click on the Set Software Preferences (on this screen) and click on the Plug-In's tab and make sure that the **SecureFM Plug In** is checked.

**Open Print Setup**

**Open File Sharing**

**Set Spell Checker**

**SCREEN MAGNIFICATION**

100%

Magnify the CPS screens for high resolution monitors.  
Blank = 100%

Please note some onscreen button text might not align properly at higher magnification

**WINDOW SETTINGS**

Maximize

Maximize expands the CPS windows to the full computer screen.

**Recommended:**  
Minimize shrinks the CPS windows to the size of the CPS program.

Proposal/Print Menu: Export Project Sales Invoice



## Main Print Menu

EME Audio & Video Systems

Mr. & Mrs. Stewart  
c/o The Hopkins Company  
Electronic Systems

PROPOSAL: 1642-00

Done

Custom Proposals

Dealer Proposals

Selected Phase

All Phases

Area	Prod	List	Sales
Text	Text	Price	Tax
Y	Y	N	Y

A Make-Model-Cat-Desc-Fin

Prices Guaranteed

From: 2-28-20

For: 31 Days

Until: 3-30-20

Proposal Date

2/28/20

Creation Date

Printer Setup

☐ Show Print Dialog

## Store Reports

View Print

- ☐ Project Job Costing
- ☐ Products @ Cost
- ☐ Products @ Cost-Dept
- ☐ Products by Phase
- ☐ Product Summary
- ☐ Product Status
- ☐ Product Specs
- ☐ P.O.'s
- ☐ P.O. Summary
- ☐ P.O. - CO Summary
- ☐ Bid Submittal
- ☐ Warehouse Pallet
- ☐ Product Sold Stickers
- ☐ Work Order
- ☐ Work Order (Detail)
- ☐ Work Order (Special)
- ☐ Install Sales Invoice
- ☐ Project Sales Invoice
- ☐ Blank Change Order
- ☐ Blank Quality Control
- ☐ Mailing Labels
- ☐ Project Reconciliation

No Breaks

## Client Proposals

Done

### Product & Install Prices Separate Entire Proposal

view print

- ☐ CPS Cover Page
- ☐ Areas & Products
- ☐ Product Summary
- ☐ Area Summary
- ☐ Project Info
- ☐ Contract

### Product & Install Prices Combined Entire Proposal

view print

- ☐ CPS Cover Page
- ☐ Areas & Products
- ☐ Product Summary
- ☐ Area Summary
- ☐ Project
- ☐ Contract

### Additional Proposal Sections

view print

- ☐ Letterhead Cover Pages
- ☐ Area/Product Prices - No Area Text
- ☐ Area Summary with tax
- ☐ Extra Text Pages
- ☐ Extra Contract Page
- ☐ Technical Services Page
- ☐ Follow-Up Letters
- ☐ Scope of Work Page

Custom proposals print without page breaks between areas.

These proposals print one area per page.

☐ Show Proposal Total Amount on Cover page

☐ Export Project Sales Invoice to Excel

A	B	C	D	E	F	G	H	I	J	K
PROPOSAL_N	CLIENT_FUL	COMPANY	ZONE1_AREA	QTY	UNIT	PRODUCT_FU	CATEGORY_U	UNIT_SELL	SUBTOTAL_E	STATUS_TAX
1	1642-00	Stewart	c/o The Hopkins Company			SYSTEM DESIGN		0.00	0.00	T
2	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		0.00	0.00	T
3	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		180.00	180.00	T
4	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		40.00	40.00	T
5	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		2395.00	2395.00	T
6	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		233.00	233.00	T
7	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		299.95	299.95	T
8	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		249.95	249.95	T
9	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		649.95	649.95	T
10	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		289.95	289.95	T
11	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		799.00	799.00	T
12	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		499.00	499.00	T
13	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		269.99	269.99	T
14	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		699.00	699.00	T
15	1642-00 v1	Stewart	c/o The Hopkins Company			1 - STUDY HOME THEATER		6499.00	6499.00	T
16	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		0.00	0.00	T
17	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		399.00	399.00	T
18	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		10.00	40.00	T
19	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		399.95	399.95	T
20	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		799.00	799.00	T
21	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		375.00	1500.90	T
22	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		419.99	419.99	T
23	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		1299.99	1299.99	T
24	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		269.99	269.99	T
25	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER		699.00	699.00	T
26	1642-00 v1	Stewart	c/o The Hopkins Company			2 - GREAT ROOM HOME THEATER				T

Proposal/Print Menu: Improve Sold Stickers



<b>Main Print Menu</b> EME Audio & Video Systems Jim Engandela Horizon Software Custom Audio & Video System PROPOSAL: 1001-00	<b>Store Reports</b> View Print		<b>Client Proposals</b>		<b>Done</b>							
	<input type="checkbox"/> Project Job Costing <input type="checkbox"/> Products @ Cost <input type="checkbox"/> Products @ Cost-Dept <input type="checkbox"/> Products by Phase <input type="checkbox"/> Product Summary <input type="checkbox"/> Product Status <input type="checkbox"/> Product Specs	<b>Product &amp; Install Prices Separate</b> <u>Entire Proposal</u> 		<b>Product &amp; Install Prices Combined</b> <u>Entire Proposal</u> 								
		<u>Proposal Sections</u> view print <input type="checkbox"/> CPS Cover Page <input type="checkbox"/> Areas & Products <input type="checkbox"/> Product Summary <input type="checkbox"/> Area Summary <input type="checkbox"/> Project Info <input type="checkbox"/> Contract		<u>Proposal Sections</u> view print <input type="checkbox"/> CPS Cover Page <input type="checkbox"/> Areas & Products <input type="checkbox"/> Product Summary <input type="checkbox"/> Area Summary <input type="checkbox"/> Project <input type="checkbox"/> Contract								
	<input type="checkbox"/> P.O.'s <input type="checkbox"/> P.O. Summary <input type="checkbox"/> P.O. - CO Summary <input type="checkbox"/> Bid Submittal <input type="checkbox"/> Warehouse Pallet <input type="checkbox"/> Product Sold Stickers											
	<div> <div>Selected Phase</div> <div>All Phases</div> </div> <table border="1"> <tr> <td>Area Text</td> <td>Prod Text</td> <td>List Price</td> <td>Sales Tax</td> </tr> <tr> <td>Y</td> <td>S</td> <td>Y</td> <td>Y</td> </tr> </table>	Area Text	Prod Text	List Price	Sales Tax	Y	S	Y	Y			
Area Text	Prod Text	List Price	Sales Tax									
Y	S	Y	Y									

<b>SOLD STICKER</b> Jim Engandela Horizon Software 100100		3	<b>SOLD STICKER</b> Jim Engandela Horizon Software 100100		1	<b>SOLD STICKER</b> Jim Engandela Horizon Software 100100	
		Linn	LK 85		Linn	KEILIDH/KABER	
<b>SOLD STICKER</b> Jim Engandela Horizon Software 100100		4	<b>SOLD STICKER</b> Jim Engandela Horizon Software 100100		1	<b>SOLD STICKER</b> Jim Engandela Horizon Software 100100	
1			SILVER		Linn	KOLEKTOR	
Linn	ARKIV						

POS/All Invoices: Add email and New Labels

Modify Sales Inv	Modify Costing	Modify Packing	Invoice Set-Up		Done												
			?		Printer Setup												
Address 1:			Jim Searing	Show Print Dialog <input type="checkbox"/>													
COMPANY			Searing Residence														
ADDRESS			1119 Englewild Dr														
CITY			Glendora														
ST, ZIP, COUNTRY			CA 91741														
Address 2:			Jim Searing														
COMPANY			Searing Residence														
ADDRESS			3513 Finley														
CITY			Newport Beach														
ST, ZIP, COUNTRY			CA 92663														
HOME PHONE:			138-987-9765														
WORK PHONE:			238-987-9765														
Other			338-987-9765														
MOBILE:			909 223 4732														
FAX:			626 857 0928														
Primary Email:			horizon@trivest.net														
Hourly Labor: 90.00			SPECIALIST John Gilmore														
Tax Labor? NO			PROPOSAL #														
Show Tax? <input checked="" type="radio"/> YES <input type="radio"/> NO																	
<table border="1"> <thead> <tr> <th>A</th> <th>TAX RATES</th> <th>B</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> 1</td> <td>8.00%</td> <td></td> </tr> <tr> <td><input type="radio"/> 2</td> <td>5.00% Added.....</td> <td>5.00%</td> </tr> <tr> <td><input type="radio"/> 3</td> <td>5.00% Compound</td> <td>5.00%</td> </tr> </tbody> </table>			A	TAX RATES	B	<input checked="" type="radio"/> 1	8.00%		<input type="radio"/> 2	5.00% Added.....	5.00%	<input type="radio"/> 3	5.00% Compound	5.00%			
A	TAX RATES	B															
<input checked="" type="radio"/> 1	8.00%																
<input type="radio"/> 2	5.00% Added.....	5.00%															
<input type="radio"/> 3	5.00% Compound	5.00%															

Print/Prev 1	2	3	Invoice		Costing	Done
Cost:	Packing List:	Duplicate Sales Invoice	SI #5766		Set Up	
Address 1:			Address 2: 10/28/2011			
Jim Searing			Jim Searing			
Searing Residence			Searing Residence			
1119 Englewild Dr			3513 Finley			
Glendora, CA 91741			Newport Beach, CA 92663			
Email: horizon@trivest.net						
Reference Description:			HOURS 00 TOTAL 81,934.20			
Ship VIA		Payment	Terms	Ticket #	Proposal #	Sales Rep
Elite Delivery			Due Upon Receipt of Invoice			John Gilmore
Pick	QTY	unit	PRODUCT DESCRIPTION	Install min. sec	PRICE	TOTAL
	1	ea	RUNCO D73D ULTRA CTN WIDE AUTOSCOPE LONG THROW		74695.00	74695.00
	1	ea	RUNCO 6PACK OF PRECISE GLASSES (FOR GUESTS)		180.00	180.00
	4	ea	RUNCO PREMIUM GLASSES (FOR YOU AND FAMILY)		135.00	540.00
			I ORDERED THE PROJECTOR TODAY			
						Product Tax <input type="checkbox"/>
						No Labor Tax <input type="checkbox"/>

Ship VIA	Payment	Terms	Ticket #	Proposal #	Sales Rep	
Elite Delivery		Due Upon Receipt of Invoice			John Gilmore	
QTY	PRODUCT DESCRIPTION				PRICE	TOTAL
1 ea	RUNCO D73D ULTRA CINEWIDE AUTOSCOPE LONG THROW				74695.00	74695.00
1 ea	RUNCO 6 PACK OF PRECISE GLASSES (FOR GUESTS)				180.00	180.00
4 ea	RUNCO PREMIUM GLASSES (FOR YOU AND FAMILY)				135.00	540.00
I ORDERED THE PROJECTOR TODAY						
BY THE WAY YOU OWE ME MUCH HAHAHAHA						

## Contacts: Display and Send Email addresses

**Find Contacts** Fav All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Add Contact** 298 of 298 **Contacts** 9/8/20 **Views** **Done**

**View POS** ? Click to view detail Pick to create a POS Invoice or Task **Utility** **Print Menu**

Pick	Fav Name	Company	Category	Email	Fav Phone	Fav
		Capitol Sales Company	Vendor		(W) 800-467-8255	<input type="checkbox"/>
	Engandela, Jim	Horizon Software	Vendor	(W) 715-287-3335		<input type="checkbox"/>
	Gadget, House	Stock 1402	Employee			<input type="checkbox"/>
	Greene, Orville	Orville Greene Consulting	Consultant			<input type="checkbox"/>
	Oliver, Michele		Employee			<input type="checkbox"/>
	Gamsin, Marc	Gamsin	Client	(H) 310.200.6400		<input type="checkbox"/>
	Angileri, Danila				1609	<input type="checkbox"/>
	Selig, David				389	<input type="checkbox"/>
	Dennis, Lisa				984	<input type="checkbox"/>
	Mizrahi, Nico				600	<input type="checkbox"/>
	Grayson, Kevin					<input type="checkbox"/>
	Somers, Chris				6-7753	<input type="checkbox"/>
					6-7666	<input type="checkbox"/>
					6-9700	<input type="checkbox"/>

**Primary Email** ×

**Jim Engandela - Horizon Software**

**Email: horizon@triwest.net**

**Send Email** **OK**

## Proposal/Print Menu: Improve Warehouse Pallet



Jim Engandela  
Horizon Software  
S. 15700 Hwy U.  
Strum, WI 54770

# Warehouse Pallet List

9/8/20 Page: 1

Proposal: 1001-00

Project Mgr:

## EME Audio & Video Systems

Qty	Make - Model - Description	Wire Type	Rec'd Date	Installed Date
2 ea	LINN - ARKIV - CARTRIDGE - MOVING-COIL CARTRIDGE	1 Good		
2 ea	LINN - EKOS - TONEARM BLACK	1 Good		
2 ea	LINN - IKEMI - COMPACT DISC PLAYER - REMOTE CONTROL CD PLAYER BLACK	1 Good		
8 m	LINN - K600 CABLE - ACCESSORIES - TRI-WIRE SPEAKER CABLE/METRE	1 Good		
2 pr	LINN - KEILIDH AKTIV (3-WAY) - CHERRY/ROSENU - LOUDSPEAKER - CHERRY/ROSENU (INC. AKTIV CARDS CHERRY OR ROSENU	1 Good		
2 pr	LINN - KEILIDH/KABER STAND - LOUDSPEAKER UPGRADES - STANDS (PAIR) GREY	1 Good		


Proposal/Pick Contact: Set instead of Paste

Proposal Contract & POS Invoices: Add CC Text Line

POS Quotations and Sales Invoices

Proposal Text	Payment Terms	Other Defaults ?	Master Set-Up Please use normal style text	Access Codes	Proposal Numbers	Done
<b>Company Name:</b> EME Audio & Video Systems			<b>CPS Expiration Date:</b> CPS access is enabled			
<b>Address:</b> S15700 Hwy U			<b>GraphicsDraw!</b> Access not enabled			
<b>City:</b> Strum						
<b>State:</b> WI <b>Zip:</b> 54770						
<b>Phone:</b> (715) 287-3335			<b>Purchasing Ship To: Warehouse Address</b>			
<b>Fax:</b> (715) 287-4464			<b>Address:</b> 414 W Ridgemont			
			<b>City:</b> Strum			
			<b>State:</b> WI <b>Zip:</b> 54770			
			<b>Buyer:</b> Jim Engandela			
<b>Switch Company</b>						
<b>Permit #</b> Permit: 1234						

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
<b>Other Defaults 7</b>							Next Done
<b>Proposal &amp; POS Contract Credit Card Surcharge Text</b>							Insert Default Text
Note: Prices are based on cash. Credit card payments will incur an additional 3.5 % convenience charge.							

EME Audio & Video Systems S15700 Hwy U Strum, WI 54770 Ph:(715) 287-3335 Fax:(715) 287-4464				<b>QUOTATION</b> QT #16742 9/12/2020 Permit: 1234		
Mr. Gamsin Gamsin 555 N. Bristol Los Angeles, CA 90049 Email: stbofini@aol.com		Home: 310.200.6400 Work: 310.454.0800				
Reference Description: <input type="text"/>						
Ship VIA	FOB	Terms	Ticket #	Proposal #	Sales Rep	
		Quotation prices good for 30 days				
QTY	PRODUCT DESCRIPTION				PRICE TOTAL	
1 ea	LINN: TUNE BOX: ACCESSORIES: TO HOUSE ACTIVE CARDS (MONO ONLY): BLACK				100.00 100.00	
<input type="text"/>					Sub Total:	100.00
					Installation:	17.50
					Tax:	1.30
					Freight:	
					Total:	118.80
Acceptance Signature: _____		Date: _____				
Note: Prices are based on cash. Credit card payments will incur an additional 3% convenience charge.						

Proposal Contract



Proposal: 1003-00

Permit: 1234  
9/12/2020 Section: 5 Page: 1

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## EME AUDIO & VIDEO SYSTEMS

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**Orville Grene - Orville Grene Consulting**

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### Agreement

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Electronic Design Associates will provide the equipment and the design and installation services described in this proposal. Changes to this proposal will require a written or verbal change order and prices will be revised in accordance with these changes. EDA requires a 10 day notice prior to the start of each phase of the installation. Payments must be made in accordance with the terms of this proposal in order to meet the installation dates specified in this proposal.

---

### Guarantee

---

System includes a one year parts & labor warranty.  
Warranty covers manufacturing defects, not misuse or normal wear.  
Installation workmanship is guaranteed for one year  
Optional on-site technical support service is available.

---

### Payment Terms

---

50% Deposit due upon acceptance	\$20.49
40% Payment due before finish phase	\$16.39
10% Payment due upon completion	\$4.10 Estimated

---

### Electronics & Installation

---

Prices quoted are guaranteed until: 10/12/2020  
Products & Installation prices are estimated.  
Total price will consist of installed products & actual installation.

	<u>System Price</u>
Products:	3.00
Installation:	35.00
Parts & Materials:	0.15
Sub Total:	38.15
Tax:	2.83
Grand Total:	40.98

Date: \_\_\_\_\_  
Orville Grene  
Date: \_\_\_\_\_

Note: Prices are based on cash. Credit card payments will incur an additional 4% convenience charge.

---

S15700 Hwy U Strum, WI 54770 Ph: (715) 287-3335 Fax: (715) 287-4464

---

Version 8.3v1

Product Library/Utility: Clean Products: Improve Value List Trim - Improve Clean Routine



Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Utilities	824 of 8824		Product Library																		Detail List		Done					
Utility Views	Line List																		Vendors		Product Sets							
Inventory			click on View button for Details																				Add Product		Print Menu			
View Make		Model		Pkg		Category		Description		Price		Fav																
		ATT		00557		CORD COIL 25'		DG HANDSET		9.99																		
		FRIDGIDARE		015235-024		STANDARD		VALVE WHITE		2.80																		
		FRIDGIDARE		015616-024		STANDARD		VALVE BISQUE		2.80																		
		FRIDGIDARE		016927-012		VAC PAN		WHITE		34.95																		
		FRIDGIDARE		016940-012		VAC PAN		BISQUE		34.95																		
		FRIDGIDARE		025319		FIRE STOP		RING		14.95																		
		FRIDGIDARE		030177		SOUND OFF		MUFFLER		24.95																		
		XANTECH		03073440		CONNECTOR		DD4 KEYPAD &		12.00																		

Delete Products	Find Duplicate Products	8824 of 8824	Product Utility	Clean Products	Open Vendor Library	Done
Scroll down to view field definition						
<div>Import Product</div> <p>Importing Tab or Comma delimited file</p> <div>Print these Instructions &amp; Field Definitions</div>		<p>After clicking the button you will be asked if you want to delete all products in the Library. If you want to import just one manufacturer at a time, you should go back to the Product Library Detail List and Find, Tag and Delete that Manufacturers products, and then do the import and DO NOT delete the Product Library.</p> <p>After importing you may want to print a Orphaned Product Set report to see which Sets in your Sets Library no longer has subset products to connect to. You can then reestablish them from the Sets Library.</p> <ol style="list-style-type: none"> <li>1. Click on "Import" button.</li> <li>2. Locate and open the File containing the data you want to import.</li> <li>3. At the "Import Mapping" screen;               <ol style="list-style-type: none"> <li>a. For CPS Product files, set View By: to "Matching Names".</li> <li>b. For other files align "data in" fields on the left with CPS data fields on the right. by clicking on a CPS field and dragging it up or down into the right position. Click on the arrow between the lists to insure that the data transfers.</li> </ol> </li> <li>4. Select "Add new records" and click on the "Import" button at the bottom of the screen.</li> <li>5. Click on "OK" in the "Import Options" screen that appears.</li> </ol>				

POS/Sales Invoices: Total of Sales Invoices button

Find Sales Invoice

AllA B C D E F G H I J K L M N O P Q R S T U V W X Y Z

SALES INVOICES

Invoices Total Due

Done

QT SI CO SO WO PO AF

click on sales invoice to view

#	Invoice	Client	Company	Reference	Date	Amount	Due	Credit
SI #1042	Rocky Buldo	AVID			6/14/2009	\$2,596.83	\$2,596.83	
SI #1045		Encore Custom Audio			3/22/2002	\$941.59	\$941.59	
SI #1046		Regent Contractors			4/1/2002	\$1,152.50	\$1,152.50	
SI #1047					4/1/2002	\$1,000.00	\$1,000.00	
SI #1048					4/29/2002	\$4,215.00	\$4,215.00	
SI #1049					5/6/2002	\$4,338.63	\$4,338.63	
SI #1050					5/7/2002	\$538.75	\$538.75	
SI #1051					5/7/2002	\$429.92	\$429.92	
SI #1052					5/17/2002	\$3,278.09	\$3,278.09	
SI #1053		Dave Cannon			6/4/2002	\$1,475.33	\$1,475.33	
SI #1054		Mr.Mrs. Proulx			6/11/2002	\$9,284.13	\$9,284.13	

Total Invoice Amount Due

Total Invoice Amount Due: \$34,734,589.03

OK

[illegible]



Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Add Product to Library	605	Product Library																									Cancel	
	?																											
Pick	Make	Model	Pkg	Category	Description	OnHand	Sell	Cost	View	Fav																		
	ADEMCO	1011BE12M	BURG	AUDIO/VISUAL	DE - UL 10"		1.00	0.60	ea		<input type="checkbox"/>																	
	ADEMCO	112	ACCESS	CONTROL	ELECT -		2.00	1.20	ea		<input type="checkbox"/>																	
	ADEMCO	116	BURG	CONTACTS -	BUTTON		3.00	1.80	ea		<input type="checkbox"/>																	
	ADEMCO	11BR	BURG	SHOCK/SOUND	DET -		4.00	2.40	ea		<input type="checkbox"/>																	
	ADEMCO	11WH	BURG	SHOCK/SOUND	DET -		5.00	3.00	ea		<input type="checkbox"/>																	
	ADEMCO	1321	BURG	POWER -	TRANSFORMER		6.00	3.60	ea		<input type="checkbox"/>																	
	ADEMCO	1332	BURG	POWER -	TRNSFRMR 9V		7.00	4.20	ea		<input type="checkbox"/>																	
	ADEMCO	1332X10	BURG	POWER -	X-10		8.00	4.80	ea		<input type="checkbox"/>																	
	ADEMCO	1361	BURG	POWER -	AC		9.00	5.40	ea		<input type="checkbox"/>																	
	ADEMCO	1361X10	BURG	CONTROL	PANELS -		10.00	6.00	ea		<input type="checkbox"/>																	
	ADEMCO	1451-24	BURG	POWER -	TRANSFORMER		11.00	6.60	ea		<input type="checkbox"/>																	
	ADEMCO	1877SM	BURG	SPACE	PROTECTIO -		12.00	7.20	ea		<input type="checkbox"/>																	
	ADEMCO	19	BURG	CONTACTS -	TAMPER		13.00	7.80	ea		<input type="checkbox"/>																	
	ADEMCO	199-PA	BURG	SPACE	PROTECTIO - PET		14.00	8.40	ea		<input type="checkbox"/>																	
	ADEMCO	1990	BURG	SPACE	PROTECTIO -		15.00	9.00	ea		<input type="checkbox"/>																	
	ADEMCO	24	HARDWARE	MISCELLANEO -			16.00	9.60	ea		<input type="checkbox"/>																	
	ADEMCO	2520	BURG	SHOCK/SOUND	DET -		17.00	10.20	ea		<input type="checkbox"/>																	
	ADEMCO	258WH	BURG	CONTACTS -	TOGGLE		18.00	10.80	ea		<input type="checkbox"/>																	
	ADEMCO	264	BURG	CONTACTS -	ADEMCO		19.00	11.40	ea		<input type="checkbox"/>																	
	ADEMCO	266	BURG	CONTACTS -	ADEMCO		20.00	12.00	ea		<input type="checkbox"/>																	
	ADEMCO	268	BURG	CONTACTS -	ADEMCO		21.00	12.60	ea		<input type="checkbox"/>																	

POS/Sales Invoice/Preview Invoice Fix

When Previewing a Sales Invoice, the Invoice no longer prints

POS/Sales Invoice: Post Payment Due on Exit

When clicking the Exit button instead of the Done button, the Payment Due amount was not getting posted to the Invoice list. Now it posts correctly.



Find Sales Invoice		All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Print/Export List		QT	SI	CO	SO	WO	PO	AF	SALES INVOICES										Invoices Total Due		Done							
		click on sales invoice to view																										
#	#	Invoice Client		Company				Reference				Date		Amount		Due												
SI #7203		Jim Engandela		Horizon Software								3/30/2015		\$1,940.17		\$1,940.17												
SI #7199				Capitol Sales Company								3/19/2015		\$913.29		\$913.29												
SI #7197		Bill Allen		W.B. Construction Inc.								3/8/2014		\$5,768.14		\$5,768.14												
SI #7196		David Steff										3/8/2014		\$2,670.33		\$2,670.33												
SI #7195				Berry Contractors								3/8/2014		\$1,152.50		\$1,152.50												
SI #6930		Kirk Tahmizian										2/5/2014		\$1,048.73		\$1,048.73												
SI #6928		JIM POULTON		Poulton Residence								2/5/2014		\$2,141.82		\$2,141.82												
SI #6927		Kirk Tahmizian										2/5/2014		\$2,972.18		\$2,972.18												
SI #6926		Richard & Tracy Scott										2/5/2014		\$313.30														

Print/Prev 1		2		3				Invoice		Costing		Done	
Cost:		Packing List:		Duplicate Sales Invoice		SI #7203				Set Up			
Vendor:				Address 2:				3/30/2015					
Jim Engandela Horizon Software S. 15700 Hwy U. Strum, WI 54770				Work: 715-287-3335  Fax: 715-287-4464				Jim Engandela Horizon Software					
Reference Description:				HOURS 2.50				TOTAL 1,940.17					
Ship VIA		Payment		Terms		Your #		Proposal #		Sales Rep			
				Payment On Delivery									
Pick	QTY	unit	PRODUCT DESCRIPTION						Install min. sec	PRICE	TOTAL		
	2	ea	LINN: 5101 PERSONAL HANDSET : 5764: ACCESSORIES: UNIVERSAL						30.00	234.00	468.00		
	1	ea	LINN: 5101 PERSONAL HANDSET : 5764: ACCESSORIES: UNIVERSAL						30.00	390.00	390.00		
	1	ea	LINN: 5101 PERSONAL HANDSET : 5764: ACCESSORIES: UNIVERSAL						30.00	390.00	390.00		

POS/Sales Invoices: Sort Payment Due

Due now sorts payments in descending order

Find Sales Invoice		All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Print/Export List		QT	SI	CO	SO	WO	PO	AF	SALES INVOICES										Invoices Total Due		Done							
		click on sales invoice to view																										
#	#	Invoice	Client	Company		Reference		Date		Amount		Due																
SI #5418		Jim Searing	Searing Residence					1/23/2011		\$255,000.00		\$255,000.00																
SI #2996		Shane & Jin Mosley						3/12/2007		\$115,000.00		\$115,000.00																
SI #3666		Mrs. Fields						11/21/2007		\$97,477.02		\$97,477.02																
SI #3655		Steve & Laura Anenberg						11/8/2007		\$83,635.22		\$83,635.22																
SI #4946		Mr. & Mrs. Han	John Wei					10/29/2009		\$83,000.00		\$83,000.00																
SI #5766		Jim Searing	Searing Residence					10/28/2011		\$81,934.20		\$81,934.20																
SI #4157		Dimitri Brizolis						3/4/2008		\$90,500.00		\$78,480.00																
SI #1728		Dave Butler						2/23/2005		\$75,615.70		\$75,615.70																

Proposal/POS: Pick Product Clean Carriage Returns

Add Product to Library		Product Library Detail		Spell		Done	
Make:	LINN	Department:		Product Tax:	T		
Model:	AV 5105	SKU#:		No Labor Tax:	<input type="checkbox"/>		
Category:		Location:					
Description:		Supplier:	LINN PRODUCTS				
Finish:		Parts:		Phase:	0		
Features:	Compact high quality 240 watts per channel stereo power amplifier. Dual mono design for maximum separation and performance with active crossover interface.			Opt Qty:	1		
				Favorite:	A		
				Placement:			
Unit:	EA	CALCULATOR	A%	B-shipping	PRODUCT PRICE		
Net Cost:	1,137.00	Manual Entry	%	\$	COST/EA:	1,137.00	
Sell Price:	1,895.00	Manual Entry	%		GP: 40.0%	SELL PRICE:	1,895.00
List Price:	1,895.00				LIST PRICE:	1,895.00	
Installation:	30.00	Min.Sec	1.0	Hours to Min	Rate: 70.00	Charge: 35.00	INSTALLED PRICE: 1,930.00
Base Wire \$:	100.00	Rack Spaces:		W 381mm x H 80mm x D 355mm		Import Picture	
Weight:	6.5	kg	Dimensions:	W 381mm	H 80mm	D 355mm	
AC Consumption:		watts	Warranty:				
DC Consumption:		amps	Install Notes:				

Add Product to Library		Product Library Detail		Spell	
Make:	CRESTRON	Department:			
Model:	CLW-DIMEX-E-W-S	SKU#:			
Category:	CONTROL	Location:			
Description:	CAMEO® EXPRESS WIRELESS	Supplier:	CRESTRON		
Features:	IN-WALL DIMMER, WHITE,	Parts:			

Version 8.2v1

Proposal/Project Detail: When going to the Proposal Detail screen - View as List is now Automatic



Project	Purchasing	Proposal Detail		Pricing	Done
Areas	Work Orders	Moffatt c/o The Hopkins Company		Set Up	Change Orders
Products	Invoicing	1594-00		Tracker	Print Menu
Selected Phase All Phases	Sold Done	Products: \$116,200.57	Install: \$24,507.00	Misc: \$5,810.09	Subtotal: \$146,517.66
		HP: \$144.76	Hours: 408.4	GP: 37.8%	Grand Total: \$152,786.31

**SYSTEM DESIGN** This proposal represents a design carefully prepared with your requirements,

**1 MEDIA ROOM** This area includes the following products and features:

1 ea	AUDIOPLEX TECHNOLOGY - S-2 W/ BLASTER - INFRARED REPEATER SYSTEM - 2	399.00
1 ea	CHANNEL PLUS - 5615 - VIDEO MODULATOR - MODULATOR - STEREO - 1 INPUT	380.00
1 ea	CUSTOM - LCDH1 - WIRE & CABLE - LCD PROJECTOR WIRING PACKAGE	180.00
1 ea	CUSTOM - MOD1 - WIRE & CABLE - VIDEO MODULATOR CABLE PREWIRE	25.00
1 ea	DRAPER - CLARION 133M2500 - FRONT PROJECTION SCREEN - 16X9 - 133"	1,499.00
1 ea	MAKITA - ZZ09TK - AUTOMATIC DRAPERY COMPONENT - TRACK - 9'	9.50
1 pk	MAKITA - ZZ3SWCB - AUTOMATIC DRAPERY COMPONENT - 3" WALL / CEILING	6.85
1 ea	MAKITA - ZZ480 - AUTOMATIC DRAPERY COMPONENT - ROD ASSEMBLY FOR	94.50

Project/Purchase Order: Export PO to Excel

Project	Purchasing	Project Detail		Pricing	Done
Areas	Work Orders	Jim Engandela Horizon Software		Set Up	Change Orders
Products	Invoicing	1655-00		Tracker	Print Menu
Selected Phase All Phases	Sold Done	Products: \$287,169.00	Install: \$4,075.00	Misc: \$23,058.45	Subtotal: \$314,302.45
		HP: \$2,148.94	Hours: 59.5	GP: 40.1%	Grand Total: \$335,597.76

**SYSTEM DESIGN** A carefully engineered distributed audio system will provide music listening

**BASEMENT** The design goal of this home theater is to recreate the movie theater sound to


1 ea	LNN - PACKAGE 1 -	500.00
1 ea	*LINN - CD12 - COMPACT DISC PLAYER - REMOTE CONTROL CD PLAYER	20,000.00
1 ea	*LINN - AV 5103RF - LINN AV51 SYSTEM - SYSTEM CONTROLLER WITH DTS	8,895.00
8 ea	*LINN - KLIMAX 500 SOLO - POWER AMPLIFIER - 500W MONO BLOCK AMPLIFIER	76,000.00
2 ea	*LINN - KLIMAX TUNE BOX - LOUDSPEAKER UPGRADES - TUNE BOX FOR	9,500.00
1 ea	*LINN - KELITIK AKTIV - LOUDSPEAKER - BLACK ASH ROSEWOOD CHERRY	9,000.00

Create & Print P.O.'s	Add PO Comments	Purchase Order's		Show All	PO WO SI	Done		
Selected Phase All Phases	Export PO Summary	Jim Engandela - Horizon Software 1655-00 v1		Auto Set PO Order Qty	Clear			
Class P=Proposed C=Changed A=Added D=Deleted		click on brown fields to enter data						
Zone - Area	Make Model	Supplier Class	94 Needed Proposal Sold	Sample Order	PO Order Qty	Set Qty	Rec'vd Qty	B/O Qty
BASEMENT	LNN - PACKAGE 1 -	A	1	1	1		0	-1
BASEMENT	LINN - CD12 - COMPACT DISC	A LIN	1	1				
BASEMENT	LINN - AV 5103RF - LINN AV51	A LIN	1	1			0	0
BASEMENT	LINN - KLIMAX 500 SOLO - POWER	A LIN	8	8			0	0
BASEMENT	LINN - KLIMAX TUNE BOX -	A LIN	2	2			0	0
BASEMENT	LINN - KELITIK AKTIV -	A LIN	1	1			0	0
BASEMENT	LINN - SILVER INTERCONNECT	A LIN	9	9			0	0



A	B	C	D	E	F	G
SUPPLIER_C	QTY	UNIT	MAKE	MODEL	DESRIPTIO	UNIT_RAW_C
ADI	1	EA	ademco	735be	exterior, protected	31.20
ADI	2	EA	ademco	746f	interior horn	5.50
ADI	2	EA	Ademco	995	flush mount	36.70
ADI	44	EA	ademco	d/w1	single opening	7.00
ADI	3	EA	Chemetron	cc-601	Rate of Rise - 135°	7.75
ADI	1	EA	Chemetron	cc-602	Rate of Rise - 190°	7.75
ADI	5	EA	sensor Systems	BK-2100TD	photoelectric w/ heat sensor	36.00
Audio Video Distributing	1	EA	Philips	HDR110	TiVO w/ 14 hour capacity	298.00
Audioplex Technology	1	EA	Audioplex Technology	S-2 w/ stick-emit	2 way - dual frequency	213.73
Audioplex Technology	4	EA	Audioplex Technology	stick-emit	emitter	6.00
CAPITAL SALES	1	EA	panamax	max 6 allpath	6 ac outlets - base for add-on modules	37.20
CAPITAL SALES	1	EA	panamax	max ant/catv allpath	protects 1 CATV line	21.20
CAPITAL SALES	1	EA	Panamax	towermax Soho	3 phone lines - 4 electrical	66.70
CAPITOL SALES	6	EA	LEVITON	6289	Noise Reducer In Line Filter	34.78
CAPITOL SALES	2	EA	Panasonic	kx-t7885	Phone Cds900MHz LCD CID	300.00
Custom	1	EA	custom	cnjpw1	comp. network jack prewire	7.50
Custom	1	HR	custom	labor	Hookup of cust. Existing equip.	0.00
Custom	2	EA	custom	n1c5	feeder cable category 5 - 4 twisted pair	10.00

Project/Invoices: Include Project number with Invoice Number



**EME**  
audio & video

**EME Audio & Video Systems**  
 S15700 Hwy U  
 Strum, WI 54770  
 Phone: (715) 287-3335 FAX: (715) 287-4111

Invoice Number  
1655-00 200621

Invoice Date  
2/7/2018

**Sold To:**

Jim Engandela  
 Horizon Software  
 S. 15700 Hwy U.  
 Strum WI 54770

**Ship To:**

Qty	Make	Model	Description	Price	Extended Price
1 ea	LNN	PACKAGE 1		500.00	500.00

## POS/Sales Invoices/Export List: Export Sales Invoices to Excel

Find Sales Invoice

All

A

B

C

D

E

F

G

H

I

J

K

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M

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Q

R

S

T

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V

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X

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Z

Print/Export List

QT

SI

CO

SO

WO

PO

AF

SALES INVOICES

?

↕


⌂


Done

click on sales invoice to view

#	Invoice	Company	Reference	Date	Amount	Due
SI #7203	Jim Eng...	Horizon Software		3/30/2015	\$1,940.17	\$1,940.17
SI #7199		Capitol Sales Company		3/19/2015	\$913.29	\$913.29
SI #7197	Bill Allen	W.B. Construction Inc.		3/8/2014	\$5,768.14	\$5,768.14
SI #7196	David Steff			3/8/2014	\$2,670.33	\$2,670.33
SI #7195		Berry Contractors		3/8/2014	\$1,152.50	\$1,152.50
SI #6930	Kirk Tahmizian			2/5/2014	\$1,048.73	\$1,048.73
SI #6928	JIM POULTON	Poulton Residence		2/5/2014	\$2,141.82	\$2,141.82
SI #6927	Kirk Tahmizian			2/5/2014	\$2,972.18	\$2,972.18
SI #6926	Richard & Tracy Scott			2/5/2014	-\$5,292.960	
SI #6925	Kirk Tahmizian			2/4/2014	\$566.15	\$566.15
SI #6924	...			2/4/2014	\$2,002.60	\$2,002.60

[illegible]



<b>EME Audio &amp; Video Systems</b> S15700 Hwy U Strum, WI 54770 Ph:(715) 287-3335 Fax:(715) 287-4464		<b>QUOTATION</b> QT #16736 4/23/2015 Permit: 1234				
<b>Vendor:</b> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;">         Jim Engandela          Horizon Software          S. 15700 Hwy U.          Strum, WI 54770       </div>	<b>Address 2:</b> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;">         Jim Engandela          Horizon Software       </div>					
<b>Reference Description:</b> <span style="border: 1px solid black; padding: 2px;">This is the text field for the Reference Description</span>						
<b>Ship VIA</b>	<b>FOB</b>	<b>Terms</b>	<b>Your #</b>	<b>Our #</b>	<b>Sales Rep</b>	
		Quotation prices good for 30 days				
<b>QTY</b>	<b>PRODUCT DESCRIPTION</b>				<b>PRICE</b>	<b>TOTAL</b>
2 pr	LINN: SILVER INTERCONNECT CABLES : ACCESSORIES : RCA INTERCONNECTS 1.2M:				300.00	600.00
8 ea	LINN: WAKONDA: CONTROL AMPLIFIER : REMOTE CONTROL PREAMPLIFIER : PHONO				1645.00	13160.00

<b>EME Audio &amp; Video Systems</b> S15700 Hwy U Strum, WI 54770 Ph:(715) 287-3335 Fax:(715) 287-4464				<b>QUOTATION</b> QT #16736 4/23/2015 Permit: 1234	
<b>Vendor:</b> Jim Engandela Horizon Software S. 15700 Hwy U. Strum, WI 54770		<b>Work:</b> 715-287-3335  <b>Fax:</b> 715-287-4464		<b>Address 2:</b> Jim Engandela Horizon Software	
<b>Reference Description:</b> This is the text field for the Reference Description					
<b>Ship VIA</b>	<b>FOB</b>	<b>Terms</b>	<b>Your #</b>	<b>Our #</b>	<b>Sales Rep</b>
		Quotation prices good for 30 days			
<b>QTY</b>	<b>PRODUCT DESCRIPTION</b>				<b>PRICE</b>
2 pr	LINN: SILVER INTERCONNECT CABLES : ACCESSORIES : RCA INTERCONNECTS 1.2M:				300.00
8 ea	LINN: WAKONDA : CONTROL AMPLIFIER : REMOTE CONTROL PREAMPLIFIER : PHONO				13160.00

## You can change your Printer Setup

Find Letter	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Add Letter	<div>Letter Library</div> <div>Use the Contact Mail Merge to Send Letters click on Letter to view</div>																				Print Menu		Done					
Add Form	?																				Utility		Mail Merge					
	<u>Form</u>	<u>Date</u>	<u>Title</u>																		<u>Contact</u>	<u>Sender Kind Fav Del</u>						
13	X	11/14/2015	THX Form																		Contact	SS F						



Add Letter	Duplicate	IP 13	<b>Edit Letter</b>		Printer Setup	Done
Add Form	Delete	 			Spell Checker	View/Print

Date	11/14/2015	Title	THX Form		Form	<input checked="" type="checkbox"/>	Type	Form
Fav	A	Contact	Contact		Form Reference	Proposal or POS reference		
Sender	Sender							

This design looks very adaptable for creating a semi isolated home theater that can also serve as an entertainment center accessible from the dining and kitchen area's.

I would recommend orienting the theater with the screen on the long wall where you have indicated optional video. The equipment and software storage could then be placed to the left on the short wall. It is best not to have the distraction of the electronics in the same line of sight as the picture.

This orientation also would enable us to properly design a THX surround sound system. Three front THX speakers could be built into the wall and hidden under the screen. Two powered sub woofers could also be concealed into this wall. The rear THX speakers could be placed either on the small wall surface between the outside double doors and the window or better yet on or in the ceiling, hidden from view from the dining room, behind a ceiling beam.

Some questions I need answered are;

1. What are the dimensions of the ceiling beams?
2. What area is below the theater room? Exposed/finished basement/crawl space?
3. What is the ceiling and floor treatment?

I will call you to get your thoughts on these topics.

Signature \_\_\_\_\_



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## EME AUDIO & VIDEO SYSTEMS

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This design looks very adaptable for creating a semi isolated home theater that can also serve as an entertainment center accessible from the dining and kitchen area's.

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I will call you to get your thoughts on these topics.

Signature \_\_\_\_\_

Fix: Project/Change Orders: Go to Record First instead of Go to Number so that CO's work properly

# Define Scripts for "cps.Proposal.fp5"

?

- ☐ \* GOTO AREA TEXT/FROM CHNG ORD SELECT AREA
- ☐ \* CO Find highest CO number
- ☐ \* CO Set CO Number
- ☐ \* CO Print Pricing Report
- ☐ \* CO REPRINT current CHANGE ORDER
- ☐ \* CO REPRINT current CHANGE ORDER sub
- ☐ \* CO Done from Reprint CO
- ☐ \* CO Set Tax and Grand Total Display
- ☐ \* UPDATE PRODUCT MARKUP UNIT SELL
- ☐ \* -
- ☐ \* GOTO CHANGE ORDER LIST
- ☐ \* GOTO CHANGE ORDER LIST -Done from add product
- ☐ \* GOTO CHANGE ORDER LIST/FROM DELETE DETAIL
- ☐ \* GOTO CHANGE 2ORDER LIST
- ☐ \* CHANGE AREA TEXT /from area list
- ☐ \* -
- ☐ \* SPELL PROPOSAL TEXT
- ☐ \* Replace Proposal Text with Set-Up
- ☐ \* Replace Other Defaults to Set-Up
- ☐ \* -
- ☐ \* zADD NEW 3 PROPOSAL REPLACE old
- ☐ \* zFind Phase-OSD-OA(omit sys-areas) Copy
- ☐ \* zADD AFTER AREA SUBSCRIPT old
- ☐ \* zRETURN FROM SELECT PHASEOLD
- ☐ \* zGOTO SET STATUS/LIST OLD



## "GOTO CHANGE 2ORDER LIST"

- \* Go to Record/Request/Page [First]
- \* Enter Find Mode []
- \* Paste [Select, "NEWNUM2"]
- \* Perform Find [Replace Found Set]
- \* Modify Last Find
- \* Go to Field ["AREA TEXT SORT"]
- \* Insert Text ["N"]
- \* Perform Find [Replace Found Set]
- \* Go to Layout ["CO LIST"]
- \* Perform Script [Sub-scripts, "SORT PROPOSAL-master "]





## "GOTO CHANGE ORDER LIST"

- ✦ Go to Record/Request/Page [First]
- ✦ Copy [Select, "NEWNUM2"]
- ✦ Enter Find Mode []
- ✦ Paste [Select, "NEWNUM2"]
- ✦ Perform Find [Replace Found Set]
- ✦ Modify Last Find
- ✦ Go to Field ["AREA TEXT SORT"]
- ✦ Insert Text ["N"]
- ✦ Perform Find [Replace Found Set]
- ✦ Go to Layout ["CO LIST"]
- ✦ Perform Script [Sub-scripts, "SORT PROPOSAL-master "]

## "GOTO CHANGE ORDER LIST -Done from add product"

- ✦ Perform Script [Sub-scripts, "Make Actual PD Qty=Suggested ..."]
- ✦ Go to Record/Request/Page [First]
- ✦ Copy [Select, "NEWNUM2"]
- ✦ Enter Find Mode []
- ✦ Paste [Select, "NEWNUM2"]
- ✦ Perform Find [Replace Found Set]
- ✦ Modify Last Find
- ✦ Go to Field ["AREA TEXT SORT"]
- ✦ Insert Text ["N"]
- ✦ Perform Find [Replace Found Set]
- ✦ Go to Layout ["CO LIST"]
- ✦ Perform Script [Sub-scripts, "SORT PROPOSAL-master "]

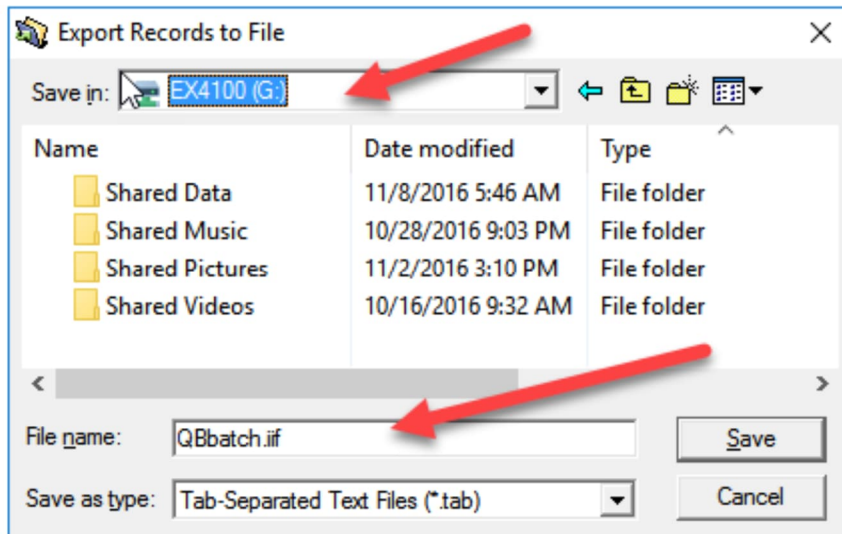
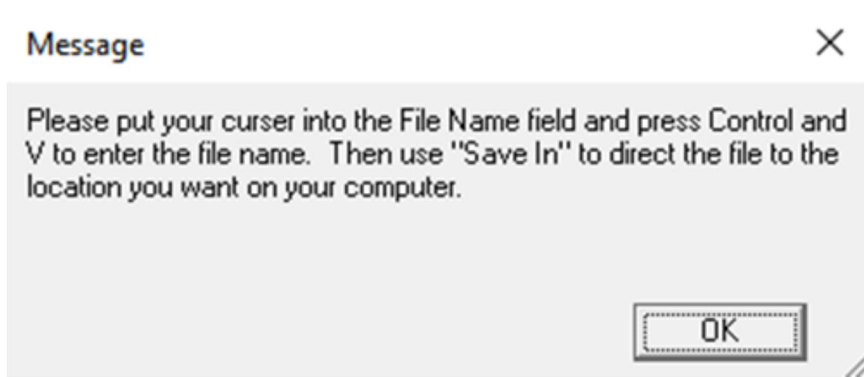
Version 8.1v4

Enhancement: QuickBooks Save File Option

Check this box in Setup/Other

## Quick Books

- ☐ Reverse Contact Name in Quickbooks to Last Name - First Name  
Please Note: This setting must conform to the naming convention used in your Quickbooks contact.
- ☒ Save File dialog box Option, enabling you to direct the QB Export.iif file to a specific location, instead of automatically placing it in the CPS folder.



Fix: Proposal/Projects: Fix Tax B labor calculation

Version 8.1v3

Fix: Project/Change Orders: Trap CO if no Areas or Products exist

Project	Purchasing		Pricing	Done
Areas	Work Orders		Set Up	Change Orders
Products	Invoicing	?	Tracker	Print Menu

Selected Phase: ☐ Sold ☐ Done
Products: \_\_\_\_\_
Install: \_\_\_\_\_
Misc: \_\_\_\_\_
Subtotal: \_\_\_\_\_
HP: \_\_\_\_\_
Hours: \_\_\_\_\_
GP: \_\_\_\_\_
Grand Total: \_\_\_\_\_

**Message**

There either are no Areas or Products in this Project, so no Change Orders can be made. You can unSell this Project and add Areas or Products if you wish.

OK

Fix: Utility/Remove Blank Proposals: Improve routine that removes blank Entities

Find Products in all Sold Proposals
Delete All Project Invoices
Delete Proposals without Numbers
Delete Entities by Date or Number

This Utility of the System

Use this to groom your proposals and project of records without Proposal numbers. They are useless.

Delete All Proposals, Project and Completed Projects by Date or Entity Number.

**Message**

Do you want to remove all of the Proposals in CPS that do not have Proposal Numbers?

Remove Cancel

Fix: POS/Quotation: Print Button now Prints Quote properly

Version 8.1v2

Enhancement: Export Proposals & Projects to Excel

You can now Export Proposals and Projects to Excel in several configurations, including the Subtotals, Tax, Grand Total and Labor Hours.

Export the Entire Proposal/Project including Areas and Products



Project		Purchasing		Proposal Detail		Pricing		Done	
Areas		Work Orders		T. G. Harrington Company		Set Up		Change Orders	
Products		Invoicing		1535-00		Tracker		Print Menu	

Selected Phase	Sold	Done	Products	\$28,964.80	Install: \$8,785.00	Misc: \$1,448.25	Subtotal:	\$39,198.05
All Phases	<input type="checkbox"/>	<input type="checkbox"/>		\$118.88	Hours: 146.4	GP: 42.4%	Grand Total:	\$40,334.57

Click

SYSTEM DESIGN This proposal represents a design carefully prepared with your requirements, our experience and expertise. This proposal includes the following products and features:

1 MASTER BEDROOM This area includes the following products and features:

2 ea SONANCE - T3000 - IN-WALL SPEAKER - 3 WAY 330.00

2 MASTER BATH This area includes the following products and features:

2 ea SONANCE - T3000 - IN-WALL SPEAKER - 3 WAY 330.00

3 BEDROOM 2 This area includes the following products and features:

2 ea SONANCE - T2000 - IN-WALL SPEAKER - 2 WAY 250.00

4 BEDROOM 3 This area includes the following products and features:

2 ea SONANCE - T2000 - IN-WALL SPEAKER - 2 WAY 250.00

5 GUEST BATHROOM This area includes the following products and features:

2 ea SONANCE - T2000 - IN-WALL SPEAKER - 2 WAY 250.00

Message

Do you want to Export the Entire Proposal/Project or Only the Products in this Proposal/Project.

Tyler Products Entire Prop

1535-00 - 9/9/1999 - Harrington, T. G. - Company - Jeff Ednenfield	SYSTEM DESIGN This proposal represents a design carefully prepared with your requirements, our experience and expertise. This proposal includes the following products and features:			
Products: = \$28,964.80	1 MASTER BEDROOM This area includes the following products and features:			
Installation: = \$8,785.00	2 MASTER BATH This area includes the following products and features:			
Parts & Materials: = \$1,448.25	3 BEDROOM 2 This area includes the following products and features:			
Subtotal = \$39,198.05	4 BEDROOM 3 This area includes the following products and features:			
Tax:: = \$1,136.52	5 GUEST BATHROOM This area includes the following products and features:			
Grand Total: = \$40,334.57	6 DINING ROOM This area includes the following products and features:			
Total Install Hours = 146.4	7 KITCHEN This area includes the following products and features:			
	8 HOME THEATER SYSTEM This area includes the following products and features:			
	1 POLK AUDIO PSW120	EA	289	289
	2 POLK AUDIO RM2300	EA	199.95	399.9
	2 POLK AUDIO RMBKT	ea	40	80
	1 POLK AUDIO PSW120	EA	289	289
	2 POLK AUDIO RM2300	EA	199.95	399.9
	2 POLK AUDIO RMBKT	ea	40	80
	6 CUSTOM LABOR	HR	0	0
	1 CUSTOM LCDH1	ea	199	199
	1 CUSTOM SSPW1	EA	60	60

Export the Entire Proposal/Project with only Products





Show All Products		Sort						Find Product	Replace			
Detail List	Product Utilities	50	Proposal Products Line List Mr. Harrington - Company					Add Area	View Areas	Done		
Click on Area to show only that Area		View Add ↓	Delete ↓	Pick Place ↓	Qty	Make	Model	Unit	Unit Sell	Total Sell	Unit List	Total List
Zone-Area		Products: \$28,964.80		Install: \$8,785.00		Misc Parts: \$1,448.25		Sub Total:		\$39,198.05		
1n MASTER BEDROOM						2 SONANCE	T3000	ea	165.00	330.00	250.00	
2n MASTER BATH						2 SONANCE	T3000	ea	165.00	330.00	250.00	
3n BEDROOM2											00	175.00
4n BEDROOM3											00	175.00
5n GUEST BATHROOM											00	175.00
6n DININGROOM											00	339.95
6n DININGROOM											90	219.95
6n DININGROOM											00	40.00
7n KITCHEN											00	339.95
7n KITCHEN						2 POLK AUDIO	RM2300	ea	199.95	399.90	219.95	
7n KITCHEN						2 POLK AUDIO	RMBKT	ea	40.00	80.00	40.00	
8n HOME THEATER SYSTEM						6 CUSTOM	LABOR	hr	0.00	0.00		

1535-00 - 9/9/1999 - Harrington, T. G. - Company - Jeff Ednenfield	1	ADEMCO	735BE	EA	50	50
	6	ADEMCO	746F	EA	15	90
Products: = \$28,964.80	2	ADEMCO		958 EA	20	40
Installation: = \$8,785.00	6	ADEMCO		995 EA	70	420
Parts & Materials: = \$1,448.25	30	ADEMCO	D/W1	EA	15	450
-----	7	CHEMETRON	CC-601	EA	20	140
Subtotal = \$39,198.05	2	CHEMETRON	CC-602	EA	20	40
Tax:: = \$1,136.52	1	CUSTOM	DISH INSTALLATION		30	30
=====	2	CUSTOM	DSS1	EA	55	110
Grand Total: = \$40,334.57	6	CUSTOM	LABOR	HR	0	0
	1	CUSTOM	LCDH1	ea	199	199
Total Install Hours = 146.4	1	CUSTOM	SSPW1	EA	60	60
	1	HAI	10A00-3	ea	1399	1399
	2	HAI	10A06	EA	155	310
	1	HAI	10A07	ea	55	55

Enhancement: Utility: Delete All Entities



## CPS Utilities



Done

### Master CPS Import Utility

Use this to upgrade your CPS data from previous versions.

### Import Proposal

Use this to import a single proposal from another computer.

### Clear NetLock

Use this to release the Product and Set library for network usage.

### Clear Add Product to Library

Use this to release the Add Product utility for network usage.

### Export Invoices to Quickbooks

First create Project Invoices from the Project Invoice screen.  
This will create a file named QBBatch.iif in your CPS folder with Invoices.  
Click this button & Open QuickBooks Pro and select the Invoice module.  
Go to the QB File menu Utilities/Import and select IIF.  
Open the QBBatch.iif file and your invoices will be created in Quickbooks.

### Export Estimate to Quickbooks

First create Project Estimates from the Project Invoice screen.  
This will create a file named QBBatch.iif in your CPS folder with Estimates.  
Click this button & Open QuickBooks Pro and select the Estimate module.  
Go to the QB File menu Utilities/Import and select IIF.  
Open the QBBatch.iif file and your Estimate will be created in Quickbooks.

### Find Products in all Sold Proposals

This Utility will Find all of the specified Products contained in all of the Sold Proposals (Projects) in CPS

### Delete All Project Invoices

Use this to delete all sales invoices that are in your Project database.  
Use this only to start invoices from scratch.

### Delete Proposals Without Numbers

Use this to groom your proposals and project of records without Proposal numbers. They are useless.

### Delete Proposals, Projects and Completed

Delete All Proposals, Project and Completed Projects  
by Date or Entity Number.

Tag or UnTag	<b>Delete Entites</b>							Done Cancel
Delete Tagged Entities	Show All		Find Entites by Date or Number					
	Enter Find	Perform Find	Tag Entites to Delete Click Deleted Tagged Entities					
<i>Multi</i>	<i>Delete</i>	<i>Entity Kind</i>	<i>DATE</i>	<i>#</i>	<i>#</i>	<i>CLIENT</i>	<i>COMPANY</i>	<i>BY</i>
<input type="checkbox"/>	Proposal	9-24-2015	1662-00			NEW BUILD,		
<input type="checkbox"/>	Proposal	9-24-2015	1660-00			NEW BUILD,		
<input type="checkbox"/>	Proposal	11-25-1998	1659-00			THOMAS, BRYAN & MARY		JE
<input type="checkbox"/>	Proposal	3-18-2015	1658-00			NEW BUILD,		
<input type="checkbox"/>	Proposal	9-26-2014	1657-00			ENGANDELA, JIM	HORIZON SOFTWARE	JE
<input type="checkbox"/>	Proposal	5-6-2014	1656-00			NEW BUILD,		
<input type="checkbox"/>	Project	5-6-2008	1655-00			ENGANDELA, JIM	HORIZON SOFTWARE	WP
<input type="checkbox"/>	Project	4-26-2006	1654-00			ILLIES, MARION	EZ DAYS CAF,	WP
<input type="checkbox"/>	Project	11-4-2005	1653-00			ENGANDELA, JIM	HORIZON SOFTWARE	WP

Enhancement: Proposals/Print Menu: Increase Extra Text Page body size

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**Mr. Harrington - Company**  
**Electronic Systems**

Proposal: 1535-00

3/21/2016 Section: 6 Page: 1

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**EME AUDIO & VIDEO SYSTEMS**

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This proposal represents a design carefully prepared with your requirements, our experience and industry standards all balanced to form a workable plan. Our goal is to provide you with a well integrated, user friendly system in which every component is of the highest quality.

Be assured that we have kept your needs in mind in preparing this proposal, and, if given the opportunity, will continue to do so throughout the installation process. We take pride in our work and receive great satisfaction in providing you with a system that exceeds your expectations.

When the installation is complete, we will be available for instruction, advice, or any maintenance that may be required. We hope you will continue to call on us for any future needs and recommend us to others.

Version 8.0v7

Fix: Pricing/Tax: Adjust Tax Amount

Manually adjusting the Tax on a proposal now properly changes the total tax amount.

Sales Tax	Sales Comm	Print Pricing Setup	<b>Proposal Pricing</b> Mr. Smith - Mt. Airy Baptist Church		? Proposal Set-Up	Done
<b>Products</b>						
Selected Phase <input type="button" value="All Phases"/>		Adjust All Product Prices ORIGINAL PRICES <input type="text"/> % <input type="button" value="Update"/>			33.3% GP \$17,812.00	
		Adjust All Product Costs <input type="text"/> % <input type="button" value="Update"/>			<input type="button" value="Adjust Select Products"/>	
Project Management Amount to Labor 5		Add Prep & Travel Time to Labor 6		<b>Labor</b>		
					<input type="button" value="Update"/>	<input type="button" value="Zero Product Hours"/>
Other Labor Description	Hourly Sell Rate	Labor Hours	% of Prod Lab	Labor \$ Amount	Total	
Engineering					\$0.00	
Consultation					\$0.00	
Walk Through					\$0.00	
Travel					\$0.00	
Training					\$0.00	
					\$0.00	
						Hours    Amount Product Labor:    60.9    \$3,656.00 <input type="button" value="Difficulty Factor"/> <input type="text"/> ← Other Labor:                    \$0.00 Adjust Labor: <input type="text"/> Installation:    60.9    \$3,656.00
<b>Misc Parts</b>						
Suggested Referral Bonus % of Equip \$445.30 % of Total \$558.97 Change Parts Label: <input type="radio"/> YES <input checked="" type="radio"/> NO		Parts & Materials: <input type="text"/> 0.00 + - Referral Bonus: <input type="text"/> 0.00 Base Parts/Wire Total:			Misc Parts: \$890.60 Extra Warranty: \$0.00 On-Site Service: \$0.00 Parts & Materials: \$890.63	
<b>Proposal Totals</b>						
	<u>Cost</u>	<u>Profit</u>	<u>System Price</u>	<u>GP</u>	<u>Products &amp; Install:</u>	
Products:	11,884.81	5,927.19	17,812.00	33.3%	<u>System Price</u>	
Installation:	1,828.00	1,828.00	3,656.00	50.0%	21,468.00	
Parts & Materials:	445.30	445.33	890.63	50.0%		
Sub Total:	\$14,158.11	\$8,200.52	\$22,358.63	36.7%		
		Tax: 1,048.62				
		Grand Total:	\$23,407.25			
Adjust Tax: <input type="text"/> 100.00			HP Hourly Profit (Gross Profit/Labor Hours) \$134.57			
Tax A 948.62						
Tax B			<input type="button" value="Update"/>			

Version 8.0v6

Enhancement: Main Logo Screen: No Backup Prompt on Exit

FileMaker Server Users can now turn off the CPS Backup prompt when Exiting CPS. FileMaker Server has its own backup system, so the CPS Exit backup should not be used.



Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing Sub Totals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text	Multi Company	Other Defaults 1				?	Next   Done

CPS System Settings

**Run CPS in  
Secure Mode**

**Enable  
FileMaker Menus**

It is **recommended** that you run CPS in the Secured Mode during the normal operation of the Custom Proposal System to prevent accidental misuse the program.

**Please note:** In order for this feature to work it is necessary to

1. Copy the file named **Securefm.fmx** from the CPS Plugin folder into the Program Files/FileMaker/System folder.
3. Then restart FileMaker and click on the Set Software Preferences (on this screen) and click on the Plug-In's tab and make sure that the **SecureFM Plug In** is checked.

**Open Print  
Setup**

**Open File  
Sharing**

**Set Spell  
Checker**

SCREEN MAGNIFICATION

100%

Magnify the CPS screens  
for high resolution monitors.  
Blank = 100%

Please note some onscreen button  
text might not align properly  
at higher magnification

WINDOW SETTINGS

Maximize

Maximize expands the CPS windows  
to the full computer screen.

Recommended:

Minimize shrinks the CPS windows  
to the size of the CPS program.

**Set Software  
Preferences**

After clicking on this button  
Un-Check: "Show Status Line Help"  
Set Memory Cache to 5000  
or  
9999 if you have 32 meg of ram or more.

☒ **FileMaker Server Network Installions - No Backup on Exit**  
Check this box if you do not want to be cued to Backup CPS  
when you Exit CPS.

☐ **Do not Sort Proposals & Projects**  
Check this box if you do not want to Sort when entering the  
Proposal and Project modules.

☐ **Do not Sort POS Quotes and Invoices**  
Check this box if you do not want to Sort when entering the  
POS modules.

☐ **Enable SCPS Access**  
Check this box only if you are a Horizon SmartPartner  
and are using the Super Custom Proposal System.

Exit  
CPS

Note: Only 50 .fp5 files can be in the SCPS folder. Remove SCPSguest.fp5

Enhancement: Proposal & Products: Clean Products

Enhancement: Proposal & Products: Clean Products

Delete Products	Find Duplicate Products	8824 of 8824	<b>Product Utility</b> Scroll down to view field definitions.	Clean Products	Open Vendor Library	Done
-----------------	-------------------------	--------------	--	----------------	---------------------	------

Import Product

*Importing  
Tab or Comma  
delimited file*

Print these  
Instructions &  
Field Definitions

After clicking the button you will be asked if you want to delete all products in the Library. If you want to Import just ONE manufacturer at a time, you should go back to the Product Library Detail List and Edit, Tag and Delete that Manufacturers products, and then do the import and **DO NOT** delete the Product Library.

After importing you may want to print a Orphaned Product Set report to see which Sets in your Sets Library no longer has subset products to connect to. You can then reestablish them from the Sets Library.

- Click on "Import" button.
- Locate and open the File containing the data you want to import.
- At the "Import Mapping" screen;
  - For CPS Product files, set View By: to "Matching Names".
  - For other files align "data in" fields on the left with CPS data fields on the right. by clicking on a CPS field and dragging it up or down into the right position. Click on the arrow between the lists to insure that the data transfers.
- Select "Add new records" and click on the "Import" button at the bottom of the screen.
- Click on "OK" in the "Import Options" screen that appears.

Detail List	Product Utilities	All 4 Sort	Proposal Products Line List New Build				Find Replace ?	Proposal Areas	Done	
Click on Area to show only that Area		View Add Pick ↓ Add ↓	Qty	Make	Model	Unit	Unit Sell	Total Sell	Unit List	Total List
Zone-Area		Products: \$1,170.00		Inst: \$210.00		Misc Parts: \$358.50		Sub Total:		\$1,738.50
0n BASEMENT			3	ADL	112	ea		0.00		
0n BASEMENT			1	LINN	5101 PERSONAL	ea	390.00	390.00	390.00	
0n BASEMENT			1	LINN	5101 PERSONAL	ea	390.00	390.00	390.00	
0n BASEMENT			1	LINN	5101 PERSONAL	ea	390.00	390.00	390.00	


<h2 style="text-align: center;">Product Utilities</h2> <p style="text-align: center;">For Products in this Proposal</p>	
NEW BUILD	
Clean Products	This utility will remove carriage returns and blank spaces at the end of your products. It will not harm the Proposal Products
Update All Products to Product Library	<u>Permanently</u> reset all <b>PROPOSAL PRODUCTS</b> to the prices and specs in the Product Library.
Update All Product COSTS only	<u>Permanently</u> reset all <b>PROPOSAL PRODUCT COSTS</b> to the Costs in the Product Library.
Delete All Empty Products	<u>Permanently</u> delete all <b>PRODUCTS</b> in this proposal with "ENTER" or blank model fields from templates.
Zero All Install Labor	<u>Permanently</u> delete all <b>INSTALLATION LABOR</b> associated with each product in this proposal.
Reset All Product Placement Codes	<u>Permanently</u> reset all <b>PRODUCT PLACEMENT CODES</b> to "N" in this proposal.
Reset All Product Tax to "T"	<u>Permanently</u> reset all <b>PRODUCT TAX CODES</b> to "T" in this proposal.

Enhancement: Proposal & POS: No Labor Tax on Products Option

In addition to choosing to Tax Labor in your Master Setup, you can choose to Not Tax the Labor on Individual Products.

This can be done on each Product in the Product Library so when they are added to a Proposal or POS Quote or Invoice they will default to the No Tax option.



Add Product to Library		Product Library Detail		<span>?</span> Spell <span>⏪</span> <span>⏩</span> Done	
<b>Make:</b>	LINN	<b>Department:</b>		<b>Product Tax:</b>	T
<b>Model:</b>	5101 PERSONAL HANDSET	<b>SKU#:</b>	5764	<b>No Labor Tax:</b>	<input checked="" type="checkbox"/>
<b>Category:</b>	ACCESSORIES	<b>Location:</b>		<b>Phase:</b>	0
<b>Description:</b>	UNIVERSAL LEARNING REMOTE	<b>Supplier:</b>	LINN PRODUCTS	<b>Opt Qty:</b>	1
<b>Features:</b>	Programmable, high-power, long range, infra-red remote control for hand held or table top operation	<b>Parts:</b>		<b>Favorite:</b>	A
				<b>Placement:</b>	
<b>Unit:</b>	EA	<b>CALCULATOR</b>		<b>PRODUCT PRICE</b>	
<b>List Price:</b>	390.00	<b>A%</b>		<b>LIST PRICE:</b> 390.00	
<b>Sell Price:</b>	390.00	<b>B-shipping</b>		<b>GP: 40.0% SELL PRICE:</b> 390.00	
<b>Net Cost:</b>	234.00			<b>COST/EA:</b> 234.00	
<b>Installation:</b>	30.00 Min.Sec	<b>Hours to Min</b>		<b>Rate:</b> 70.00	<b>Charge:</b> 35.00
				<b>INSTALLED PRICE:</b>	425.00
<b>Base Wire \$:</b>	100.00	<b>Rack Spaces:</b>		<b>Import Picture</b>	
<b>Finish:</b>	Black	<b>Dimensions:</b> W	83mm	H	209mm
<b>Weight:</b>	.3 lbs	<b>D:</b>	23mm		
<b>AC Consumption:</b>		<b>Warranty:</b>	1 Year Parts & Labor		
<b>DC Consumption:</b>		<b>Install Notes:</b>			
<b>Set Package Flag:</b>	<input type="checkbox"/>	<b>PDF File Name</b>			
<input type="checkbox"/> Do not Include Install Labor Amount on this product into the proposal, Include the Install Labor Time.		<b>PDF Folder Path</b>	C:/CPS_pdf/		
		<b>Modify Cost Password:</b>			
<b>Quickbooks Accounts</b>					
Use only Alpha Numeric characters in Make Model Description and Account Names.				<b>Asset:</b>	
Entering QB accounts names will retain these accounts, otherwise they will be blank.				<b>Income:</b>	
Use the Replace button to auto enter your values into multiple products.				<b>Cost Of Goods:</b>	
Important: After changing Account Info. Run the Update QB Accounts on the Product Library/Utility screen.				<b>Supplier:</b>	LINN PRODUCTS

You can use the Find Products button in the Product Library to Find all of the Products that have the No Labor Tax option checked.

Check One		Enter all of your desired Find criteria and then click Done		Find Products with or without Labor	Done
<input type="radio"/> Understocked (-)		Make:	Department:	Product Tax:	
<input type="radio"/> Overstocked (+)		Model:	SKU#:	No Labor Tax:	<input checked="" type="checkbox"/>
Category:		Description:	Location:	Phase:	
Features:		Supplier:	Parts:	Favorite:	
				Opt Qty:	
				Qty Dif:	
Unit:		CALCULATOR	A%	B-shipping	ACTUAL PRODUCT PRICE
Net Cost:			%	\$	
Sell Price:			%		GP:      SELL PRICE:
List Price:					LIST PRICE:
Installation:		Min.Sec	Charge:		INSTALLED PRICE:
<u>Specifications</u>		Rack Spaces:			
Finish:		Dimensions: W	H	D	
Weight:		Warranty:			Base Wire \$:
AC Power:		Install Notes:			
DC Power:					

Once a Product is added to a Proposal you can check or uncheck the No Labor Tax option on Proposal Products.



Add Area	Pick Sets	Proposal Product Detail		Done
Add Product	Pick Products	New Build		Areas Products
Add product to Product Library	Pick	BASEMENT		

Qty: 2	Make: LINN	Department:	Tax: T
Model: 5101 PERSONAL HANDSET	SKU#: 5764	No Labor Tax	<input checked="" type="checkbox"/>
Category: ACCESSORIES	Location:	Phase: 0	
Description: UNIVERSAL LEARNING REMOTE	Supplier: LINN PRODUCTS	Placement: n	
Features: Programmable, high-power, long range, infra-red remote control for hand held or table top operation	Parts:		


  

Unit: EA	List: 390.00	GP%: 40.0%	EA W/ADJUST
Sell: 390.00	Set Sell Calc	0.0% Price Calc	ACTUAL SELL: 390.00 390.00
Cost: 234.00	PO Cost: 234.00	INSTALLATION: 35.00	35.00
Installation: 30.00	Min.Sec	Hours to Min	\$70.00/Hour INSTALLED PRICE: 425.00 425.00

Misc Parts/Wire: 100.00	Amt	Weight: .3 lbs	Rack Spaces:	Finish: Black
Wire Type: 1 Good	AC Consumption:	W: 83mm	H: 209mm	D: 23mm
Amount: 200.00	DC Consumption:	Warranty: 1 Year Parts & Labor		

Product Picture	<input type="checkbox"/> Do not Include the Install Labor Amount into the proposal totals, but Include the Install Labor Time into the Labor Time totals.	Quickbooks Accounts
	Modify Product Cost Password	Asset:
		Income:
		Cost Of Goods:
		Supplier: LINN PRODUCTS

Use only Alpha Numeric characters in Make Model Description and Account Names.  
 Entering QB accounts names will retain these accounts, otherwise they will be blank.  
 Use the Replace button to auto enter your values into multiple products.

You can also check or uncheck the No Labor Tax option on the Sales Tax screen by clicking on the Proposal/Pricing/Sales Tax buttons.

Project	Purchasing	Proposal Detail		Pricing	Done
Areas	Work Orders	New Build		Set Up	Change Orders
Products	Invoicing	1658-00	Tracker	Print Menu	

Selected Phase	Sold Done	Products: \$1,170.00	Install: \$210.00	Misc: \$358.50	Subtotal: \$1,738.50
All Phases	<input type="checkbox"/>	HP: \$233.35	Hours: 3.0	GP: 39.4%	Grand Total: \$1,841.24

**SYSTEM DESIGN** A carefully engineered distributed audio system will provide music listening

**BASEMENT** This area includes the following products and features:

3 ea ADEMCO - 112 - BURG CONTACTS - ADEMCO SWITCH C.C.

1 ea LINN - 5101 PERSONAL HANDSET - ACCESSORIES - UNIVERSAL LEARNING 390.00



Sales Tax	Sales Comm	Print Pricing Setup	Proposal Pricing		?	Proposal Set-Up	Done
New Build							
Products							
Selected Phase		Adjust All Product Prices				39.4% GP	
All Phases		ORIGINAL PRICES		%		Update	Adjust Select Products
							\$1,170.00
		Adjust All Product Costs		%		Update	Reset Costs
Project Management Amount to Labor 5		Add Prep & Travel Time to Labor 6		Labor			
						Update	Zero Product Hours
Other Labor Description	Hourly Sell Rate	Labor Hours	% of Prod Lab	Labor \$ Amount	Total		
Installation	\$70.00				\$0.00		
Engineering	\$80.00				\$0.00		
Travel	\$25.00				\$0.00		
Training	\$60.00				\$0.00		
					\$0.00		
					\$0.00		
					\$0.00		
						Hours	Amount
						Product Labor:	3.0 \$210.00
						Difficulty Factor	
						Other Labor:	\$0.00
						Adjust Labor:	
						Installation:	3.0 \$210.00
Misc Parts							
Suggested Referral Bonus		Parts & Materials:				Misc Parts:	
% of Equip \$58.50		0.00 + -				\$58.50	
% of Total \$86.93		Referral Bonus:				Extra Warranty:	
		0.00				\$0.00	
Change Parts Label: <input type="radio"/> YES <input checked="" type="radio"/> NO		Base Parts/Wire Total: 300.00				On-Site Service:	
						\$0.00	
						Parts & Materials: \$358.50	
Proposal Totals							
	Cost	Profit	System Price	GP	Products & Install:		
Products:	709.20	460.80	1,170.00	39.4%	System Price		
Installation:	150.00	60.00	210.00	28.6%	1,380.00		
Parts & Materials:	179.25	179.25	358.50	50.0%			
Sub Total:	\$1,038.45	\$700.05	\$1,738.50	40.3%			
		Tax:	97.53				
Adjust Tax:	0.00	Grand Total:	\$1,836.03		HP Hourly Profit (Gross Profit/Labor Hours) \$233.35		
Tax A	97.53				Update		
Tax B							

The Print Tax Summary report also reflects the No Labor Tax option

Qty	Make	Model	Area	Tax Status	Tax A	+	Tax B	Parts Tax	No Labor Tax	+ Labor Tax	= Total Tax
3	ADEMCO	112	BASEMENT	T	7.82				<input type="checkbox"/>	7.82	7.82
1	LINN	5101 PERSONAL	BASEMENT	T	31.64				<input type="checkbox"/>	2.61	31.64
2	LINN	5101 PERSONAL	BASEMENT	T	58.07				<input checked="" type="checkbox"/>		58.07

These are the POS Invoices that you can Pick Products into and contain the No Labor Tax option

POS Utility

Print POS Invoice List

Point of Sale

Done

Create a new POS Invoice

Create a New POS Invoice

View Existing POS Invoices

QUOTATIONS

WORK ORDERS

CHANGE ORDERS

SALES INVOICES

SERVICE ORDERS

PURCHASE ORDERS

ACCEPTANCE FORM

WORK REQUEST

No Labor Tax checkboxes are on the right side and can be checked or unchecked.

Print/Preview: Cost:

Duplicate Quote Convert to Invoice

Quotation QT #7198

Costing Set Up

Done

Vendor: Jim Engandela  
Horizon Software  
S. 15700 Hwy U.  
Strum, WI 54770  
Work: 715-287-3335  
Fax: 715-287-4464

Address 2: Jim Engandela  
Horizon Software

3/18/2015

Reference Description:

Ship VIA

Payment

Terms

Your #

Our #

Sales Rep

Quotation prices good for 30 days

Pick	QTY	unit	PRODUCT DESCRIPTION	Install min sec	PRICE	TOTAL	Product Tax	No Labor Tax
	1	ea	LINN: TUNE BOX: ACCESSORIES: TO HOUSE ACTIVE CARDS (MONO	30.00		0.00	T	<input type="checkbox"/>
	1	ea	LINN: K3000 STAND: ACCESSORIES: STANDS (PAIR)	30.00	150.00	150.00	T	<input checked="" type="checkbox"/>
	1	m	LINN: K600 CABLE: ACCESSORIES: TRI-WIRE SPEAKER CABLE/METRE	30.00	20.40	20.40	T	<input checked="" type="checkbox"/>
	1	1.2	LINN: BLACK INTERCONNECT CABLES: ACCESSORIES: 1.2 METER	30.00	85.00	85.00	T	<input type="checkbox"/>
	1	ea	LINN: GENKI: COMPACT DISC PLAYER: REMOTE CONTROL CD	30.00	1700.00	1700.00	T	<input type="checkbox"/>
	1	ea	LINN: K3000 STAND: ACCESSORIES: STANDS (PAIR)	1.00	150.00	150.00	T	<input type="checkbox"/>
	1	ea	LINN: 5101 PERSONAL HANDSET : 5764: ACCESSORIES: UNIVERSAL	30.00	234.00	234.00	T	<input checked="" type="checkbox"/>

Enhancement: Project/Change Orders: CO - P.O. Summary Report

Print PO - CO Summary Report for any specific Change Order



**Main**  
**Print Menu**  
EME Audio & Video Systems  
Dr. & Mrs. Devarajan  
PROPOSAL: 1588-10  
**Done**  
**Custom Proposals**  
**Dealer Proposals**  
Selected Phase  
All Phases  
Area Prod List Sales  
Text Text Price Tax  
Y Y N Y  
AMake-Model-Cat-Disc-Fin  
Prices Guaranteed  
From: 11-7-14  
For: 31 Days  
Until: 12-8-14  
Proposal Date  
11/7/14  
**Creation Date**  
**Printer Setup**  
☐ Show Print Dialog

**Store Reports**  
**View/Print**  
☐ Project Job Costing  
☐ Products @ Cost  
☐ Products @ Cost-Dept  
☐ Products by Phase  
☐ Product Summary  
☐ Product Status  
☐ Product Specs  
☐ P.O.'s  
☐ P.O. Summary  
☐ P.O. - CO Summary  
☐ Bid Submittal  
☐ Warehouse Pallet  
☐ Product Sold Stickers  
☐ Work Order  
☐ Work Order (Detail)  
☐ Work Order (Special)  
☐ Install Sales Invoice #1  
☐ Install Sales Invoice #2  
☐ Blank Change Order  
☐ Blank Quality Control  
☐ Mailing Labels  
☐ Project Reconciliation

**Client Proposals** **Done**  
1st Draft  
**Product & Install Prices Separate**  
Entire Proposal  
**Product & Install Prices Combined**  
Entire Proposal  
**Proposal Sections**  
view print  
☐ CPS Cover Page  
☐ Areas & Products  
☐ Product Summary  
☐ Area Summary  
☐ Project Info  
☐ Contract  
**Additional Proposal Sections**  
view print  
☐ Letterhead Cover Pages  
☐ Area/Product Prices - No Area Text  
☐ Area Summary with tax ☐ w/Parts Labor  
☐ Extra Text Pages ☐ Editable Extra Page  
☐ Extra Contract Page  
☐ Technical Services Page  
☐ Follow-Up Letters  
☐ Scope of Work Page

Printer Setup			P=Proposed C=Changed A=Added D=Deleted					Print CO - P.O. Summary				
Add Areas & Products	Pricing Parts & Labor	Modify Change Order	Change Orders V. N. Devarajan 1588-10 v1					RePrint C-Orders		Done		
								Area Text Y	Prod Text Y	List Price N	Sales Tax Y	View/Print C-Orders
Subtract Products		Zone Area	Show All Sort #	CO#	Class	Qty	Make	Model	Category-Description		Unit Sell	Ext Sell
	PICK OR TYPE NEW AREA			1	A	1 ea	LNN - PACKAGE 1 -				\$500.00	\$500.00
	PICK OR TYPE NEW AREA			1	A	1 ea	*LINN - CD12 - COMPACT DISC PLAYER - REMOTE				\$20,000.00	\$20,000.00
	PICK OR TYPE NEW AREA			1	A	1 ea	*LINN - AV 5103RF - LINN AV51 SYSTEM - SYSTEM				\$8,895.00	\$8,895.00
	PICK OR TYPE NEW AREA			1	A	8 ea	*LINN - KLIMAX 500 SOLO - POWER AMPLIFIER -				\$9,500.00	\$76,000.00
	PICK OR TYPE NEW AREA			1	A	2 ea	*LINN - KLIMAX TUNE BOX - LOUDSPEAKER				\$4,750.00	\$9,500.00
	PICK OR TYPE NEW AREA			1	A	1 pr	*LINN - KELTIK AKTIV - LOUDSPEAKER - BLACK				\$9,995.00	\$9,995.00
	PICK OR TYPE NEW AREA			1	A	9 pr	*LINN - SILVER INTERCONNECT CABLES -				\$300.00	\$2,700.00



Printer Setup		Print CO - P.O. Summary															
Add Areas & Products	Pricing Parts & Labor	Modify Change Order	Change Orders										RePrint C-Orders		Done		
			V. N. Devarajan										Area Text Y	Prod Text Y	List Price N	Sales Tax Y	View/Print C-Orders
			1588-10 v1														
Subtract Products		Show All Sort #		P=Proposed C=Changed A=Added D=Deleted													
Zone Area				CO#	Class	Qty	Make	Model	Category-Description				Unit Sell	Ext Sell			
PICK OR TYPE NEW AREA				1	A	1 ea	LNN - PACKAGE 1 -					\$500.00	\$500.00				
PICK OR TYPE NEW AREA				1	A	1 ea	*LINN - CD12 - COMPACT DISC PLAYER - REMOTE					\$20,000.00	\$20,000.00				
PICK OR TYPE NEW AREA				1	A	1 ea	*LINN - AV 5103RF - LINN AV51 SYSTEM - SYSTEM					\$8,895.00	\$8,895.00				
PICK OR TYPE NEW AREA				1	A							\$500.00	\$76,000.00				
PICK OR TYPE NEW AREA				1	A							\$750.00	\$9,500.00				
PICK OR TYPE NEW AREA				1	A							\$995.00	\$9,995.00				
PICK OR TYPE NEW AREA				1	A							\$300.00	\$2,700.00				
PICK OR TYPE NEW AREA				1	A							\$34.00	\$204.00				
PICK OR TYPE NEW AREA				1	A							\$9.00	\$54.00				
PICK OR TYPE NEW AREA				1	A							\$2,200.00	\$2,200.00				
PICK OR TYPE NEW AREA				1	A							\$2,695.00	\$2,695.00				
PICK OR TYPE NEW AREA				1	A							\$3,595.00	\$3,595.00				

Message

Do you want to View or Print the Change Order PO Summary?

Cancel

Print

View

Printer Setup

Print CO - P.O. Summary

Add Areas & Products

Pricing Parts & Labor

Modify Change Order

Change Orders

V. N. Devarajan

1588-10 v1

RePrint C-Orders

Done

Area Text Y

Prod Text Y

List Price N

Sales Tax Y

View/Print C-Orders

Subtract Products

Zone Area

Show All Sort #

P=Proposed C=Changed A=Added D=Deleted

CO#

Class

Qty

Make

Model

Category-Description

Unit Sell

Ext Sell

PICK OR TYPE NEW AREA

1

A

1 ea

LNN - PACKAGE 1 -

\$500.00

\$500.00

PICK OR TYPE NEW AREA

1

A

1 ea

\*LINN - CD12 - COMPACT DISC PLAYER - REMOTE

\$20,000.00

\$20,000.00

PICK OR TYPE NEW AREA

1

A

1 ea

\*LINN - AV 5103RF - LINN AV51 SYSTEM - SYSTEM

\$8,895.00

\$8,895.00

PICK OR TYPE NEW AREA

1

A

\$9,500.00

\$76,000.00

PICK OR TYPE NEW AREA

1

A

\$4,750.00

\$9,500.00

PICK OR TYPE NEW AREA

1

A

\$9,995.00

\$9,995.00

PICK OR TYPE NEW AREA

1

A

\$300.00

\$2,700.00

PICK OR TYPE NEW AREA

1

A

\$34.00

\$204.00

PICK OR TYPE NEW AREA

1

A

\$9.00

\$54.00

PICK OR TYPE NEW AREA

1

A

\$2,200.00

\$2,200.00

PICK OR TYPE NEW AREA

1

A

\$2,695.00

\$2,695.00

PICK OR TYPE NEW AREA

1

A

1 ea

LINN - IKEMI - COMPACT DISC PLAYER - REMOTE

\$3,595.00

\$3,595.00

Message

Do you want to View the PO Summary Report for All Change Order Items or a Specific Change Order?

Specific

All

Message

Do you want to View the PO Summary Report for All Change Order Items or a Specific Change Order?

Specific

All

Printer Setup

Add Areas & Products

Pricing Parts & Labor

Modify Change Order

?

Change Orders

V. N. Devarajan

1588-10 v1

Area Text

Prod Text

List Price

Sales Tax

Y

Y

N

Y

RePrint C-Orders

Done

View/Print C-Orders

Subtract Products

Zone Area

Show All Sort #

P=Proposed C=Changed A=Added D=Deleted

CO# Class Qty Make Model Category-Description Unit Sell Ext Sell

PICK OR TYPE NEW AREA

1 A

1 ea

LNN - PACKAGE 1 -

\$500.00

\$500.00

PICK OR TYPE NEW AREA

1 A

1 ea

\*LINN - CD12 - COMPACT DISC PLAYER - REMOTE

\$20,000.00

\$20,000.00

PICK OR TYPE NEW AREA

1 A

\$8,895.00

\$8,895.00

PICK OR TYPE NEW AREA

1 A

\$9,500.00

\$76,000.00

PICK OR TYPE NEW AREA

1 A

\$4,750.00

\$9,500.00

PICK OR TYPE NEW AREA

1 A

\$9,995.00

\$9,995.00

PICK OR TYPE NEW AREA

1 A

\$300.00

\$2,700.00

PICK OR TYPE NEW AREA

1 A

\$34.00

\$204.00

PICK OR TYPE NEW AREA

1 A

\$9.00

\$54.00

PICK OR TYPE NEW AREA

1 A

\$2,200.00

\$2,200.00

PICK OR TYPE NEW AREA

1 A

\$2,695.00

\$2,695.00

PICK OR TYPE NEW AREA

1 A

\$3,595.00

\$3,595.00

Enter CO Number to Print

1

OK

V. N. Devarajan

P.O.

SUMMARY

11/7/14 Page: 1

Proposal: 1588-10 v1

EME Audio & Video Systems

Proposal Phases Presented: All Phases

Specialist

Plate Style:

Plate Color:

Grill Type:

Order Qty

Ship Date

Qty Rcvd

Phase

CO#

MODEL

DESCRIPTION

Finish

UNIT COST

TOTAL COST

ADI

P.O. # ADI158810

P.O. Date:

How Ship:

3 ea				1	ADEMCO - 1332X10 - BURG POWER - X-10 TRANSFORMER FOR		16.00	48.00
							ADEMCO TOTAL:	\$48.00

LINN PRODUCTS

P.O. # LIN158810

P.O. Date:


















How Ship:

1 ea			0	1	LINN-ARKIV - CARTRIDGE-MOVING-COIL CARTRIDGE		1,320.00	1,320.00
1 ea			0	1	LINN-AV510BFR - LINN AV51 SYSTEM-SYSTEM CONTROLLER		5,277.00	5,277.00
1 ea			0	1	LINN-CD12 - COMPACT DISC PLAYER-REMOTE CONTROL CD		12,000.00	12,000.00
1 ea			0	1	LINN-EKOS - TONEARM BLACK		1,617.00	1,617.00
1 ea			0	1	LINN-IKEMI - COMPACT DISC PLAYER-REMOTE CONTROL CD		2,157.00	2,157.00
6 m			0	1	LINN-K20 CABLE - ACCESSORIES-LOUDSPEAKER CABLE METRE		5.40	32.40
10 m			0	1	LINN-K600 CABLE - ACCESSORIES-TRI-WIRE SPEAKER		20.40	204.00
1 pr			0	1	LINN-KEILIDH AKTIV (3-WAY)-CHERRY ROSENUT -		1,212.00	1,212.00















Enhancement: POS: Direct Navigation

You can now switch directly to Quotations, Sales Invoices, Change Orders, Work Orders and Purchase Orders from any screen.



Find Quote		All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																											
Print List		QT SI CO SO WO PO AF								QUOTATIONS click on quotation to view																		Done	
		  																											
#	Invoice	Client	Company		Reference		Date		Amount		Done																		
QT #1044		Jim Engandela	Horizon Software				2/15/2000		\$4,791.20		 																		
QT #1059			C & G Construction				6/13/2002		\$2,045.00		 																		
QT #1062			Diversified Pacific		Padua hills		6/26/2002		\$1,000.00		 																		
QT #1074		Gary Gray					1/30/2003		\$3,000.00		 																		
QT #1077		Gary Gray					2/18/2003		\$32,886.52		 																		
QT #1078		Terry Johnson					1/31/2003				 																		
QT #1079		Mr. Salvo	Dugalley Oberfeld, LLC				2/4/2003		\$19,676.73		 																		

Enhancement: Product Library/Utility: Find Duplicate Tagging

Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Utilities	8824 of 8824															Product Library										Detail List	Done	
Utility Views																Line List										Vendors	Product Sets	
Inventory	 															click on View button for Details										 	Add Product	Print Menu
Make	Model		Pkg		Category		Description										Price		View Fav									
LINN	TUNE BOX				ACCESSORIES - TO HOUSE ACTIVE CARD -										100.00 ea		 											
LINN	5101 PERSONAL				ACCESSORIES - UNIVERSAL LEARNING R -										390.00 ea		 											
LINN	KNEKT RCU - WHITE				ACCESSORIES - KNEKT ROOM CONTROL										340.00 ea		 											
LINN	AV 5110 LOCAL				ACCESSORIES - SMALL FULL-RANGE SPE -										325.00 ea		 											
LINN	SILVER INTERCONNECT				ACCESSORIES - RCA INTERCONNECTS 1. -										300.00 pr		 											

Delete Products	Find Duplicate Products	8824 of 8824	Product Utility	Clean Products	Open Vendor Library	Done
Scroll down to view field definitions.						
<p>After clicking the button you will be asked if you want to delete all products in the Library. If you want to Import just ONE manufacturer at a time, you should go back to the Product Library screen.</p> <p>1. Do you want to Find Duplicates and have them Automatically Tagged, so you can choose to Rename or Delete them?</p> <p>2. or</p> <p>3. Do you want to Find Duplicates and have the option to Manually or Automatically Rename them.</p> <p>4. <input type="button" value="Rename"/> <input type="button" value="Tagged"/> <input type="button" value="Cancel"/></p> <p>5. These buttons can be used for importing and exporting of products and their field maps</p>						

Import Product

Importing Tab or Comma delimited file

Print these Instructions & Field Definitions

Import Products




Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Show Pricing Errors	4 of 8	Product Library																		Line List	Done							
Tag All	Find Tags	Global Pricing	Detail List																		Vendor Library	Product Sets						
UnTag	Delete	Show Price Errors	click fields to enter data																		Add Product	Print Menu						
View		Make	Model		Category		Description																					
Tag	Department	Fav	Supplier	Install	Cost	Sell	List	unit	Sell Price	GP%	Installed	GP%																
<input checked="" type="checkbox"/>	LINN		K600 CABLE		ACCESSORIES			TRI-WIRE SPEAKER																				
<input type="checkbox"/>		A	Linn products	30.00		34.00	34.00	m	34.00	40%	69.00	70%																
<input checked="" type="checkbox"/>	LINN		K600 CABLE		ACCESSORIES			TRI-WIRE SPEAKER																				
<input checked="" type="checkbox"/>		A	Linn products	30.00		34.00	34.00	ea	34.00	40%	69.00	70%																
<input checked="" type="checkbox"/>	XPRO		PA011					WALL RECEPTCL MODULE																				
<input type="checkbox"/>			Capitol Sales	30.00		68.70			68.70	67%	?																	
<input checked="" type="checkbox"/>	XPRO		PA011					WALL RECEPTCL MODULE																				
<input checked="" type="checkbox"/>			Capitol Sales	30.00		68.70		ea	68.70	67%	103.70	78%																

Enhancement: Product Library: Remove Lookups and Index fields

All Lookup references to the Updater file have been removed and all Value List fields have been Indexed to increase speed and stability of the Proposal Product Pop Up Value List.

Enhancement: Product Library/Product Detail: Improve GUI

Add Product to Library		Product Library Detail		? Spell	Done
<b>Make:</b> LINN <b>Model:</b> 5101 PERSONAL HANDSET <b>Category:</b> ACCESSORIES <b>Description:</b> UNIVERSAL LEARNING REMOTE	<b>Department:</b> <b>SKU#:</b> 5764 <b>Location:</b> <b>Supplier:</b> LINN PRODUCTS	<b>Product Tax:</b> T <b>No Labor Tax:</b> <input checked="" type="checkbox"/>			
<b>Features:</b> Programmable, high-power, long range, infra-red remote control for hand held or table top operation	<b>Parts:</b>	<b>Phase:</b> 0 <b>Opt Qty:</b> 1 <b>Favorite:</b> A <b>Placement:</b>			
<b>Unit:</b> EA <b>CALCULATOR</b> A%    B-shipping		<b>PRODUCT PRICE</b>			
<b>Net Cost:</b> 234.00    Manual Entry    %    \$		<b>COST/EA:</b> 234.00			
<b>Sell Price:</b> 390.00    Manual Entry    %		<b>GP: 40.0%    SELL PRICE:</b> 390.00			
<b>List Price:</b> 390.00		<b>LIST PRICE:</b> 390.00			
<b>Installation:</b> 30.00 Min.Sec    Hours to Min    Rate: 70.00    Charge: 35.00		<b>INSTALLED PRICE:</b> 425.00			
<b>Base Wire \$:</b> 100.00 <b>Finish:</b> Black <b>Weight:</b> .3 lbs <b>AC Consumption:</b> watts <b>DC Consumption:</b> amps	<b>Rack Spaces:</b> W 83mm x H 209mm x D 23mm <b>Dimensions:</b> W 83mm    H 209mm    D 23mm <b>Warranty:</b> 1 Year Parts & Labor <b>Install Notes:</b>	<b>Import Picture</b> 			
<b>Set Package Flag:</b>		<b>PDF File Name</b>			
<input type="checkbox"/> Do not Include Install Labor Amount Include the Install Labor Time		<b>PDF Folder Path</b> C:/CPS_pdf/			
<b>Modify Cost Password:</b>					
<b>Quickbooks Accounts</b>					
Use only Alpha Numeric characters in Make Model Description and Account Names.  Entering QB accounts names will retain these accounts, otherwise they will be blank.  Use the Replace button to auto enter your values into multiple products.  Important: After changing Account Info. Run the Update QB Accounts on the Product Library/Utility screen.				<b>Asset:</b> <b>Income:</b> <b>Cost Of Goods:</b> <b>Supplier:</b> LINN PRODUCTS	
<b>Created:</b> 10/21/1981			<b>Modified:</b> 9/30/2015		

Fix: Proposal/Print Menu/Follow-Up: Brings in the correct Proposal

<div> <b>Main Print Menu</b>        EME Audio &amp; Video Systems        Cory &amp; Sara Cahn        Electronic Systems        PROPOSAL: 1640-00        Done        Custom Proposals        Dealer Proposals        Selected Phase        All Phases  <table border="1"> <thead> <tr> <th>Area</th> <th>Prod</th> <th>List</th> <th>Sales</th> </tr> <tr> <th>Text</th> <th>Text</th> <th>Price</th> <th>Tax</th> </tr> </thead> <tbody> <tr> <td>Y</td> <td>Y</td> <td>N</td> <td>Y</td> </tr> </tbody> </table>       A Make-Model-Cat-Desc-Fin        Prices Guaranteed        From: 11-10-14        For: 31 Days        Until: 12-11-14        Proposal Date        11/10/14        Creation Date        Printer Setup  <input type="checkbox"/> Show Print Dialog     </div>	Area	Prod	List	Sales	Text	Text	Price	Tax	Y	Y	N	Y	<div> <b>Store Reports</b>        View Print  <input type="checkbox"/> Project Job Costing  <input type="checkbox"/> Products @ Cost  <input type="checkbox"/> Products @ Cost-Dept  <input type="checkbox"/> Products by Phase  <input type="checkbox"/> Product Summary  <input type="checkbox"/> Product Status  <input type="checkbox"/> Product Specs  <input type="checkbox"/> P.O.'s  <input type="checkbox"/> P.O. Summary  <input type="checkbox"/> P.O. - CO Summary  <input type="checkbox"/> Bid Submittal  <input type="checkbox"/> Warehouse Pallet  <input type="checkbox"/> Product Sold Stickers        No Breaks  <input type="checkbox"/> Work Order  <input type="checkbox"/> Work Order (Detail)  <input type="checkbox"/> Work Order (Special)  <input type="checkbox"/> Install Sales Invoice #1  <input type="checkbox"/> Install Sales Invoice #2  <input type="checkbox"/> Blank Change Order  <input type="checkbox"/> Blank Quality Control  <input type="checkbox"/> Mailing Labels  <input type="checkbox"/> Project Reconciliation     </div>	<div> <b>Client Proposals</b> <div>1st Draft</div> <div>Done</div> </div> <table border="1"> <tr> <td data-bbox="716 174 1008 730"> <b>Product &amp; Install Prices Separate</b>  <u>Entire Proposal</u>    <b>Proposal Sections</b>  <u>view print</u>  <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> Product Summary  <input type="checkbox"/> Area Summary  <input type="checkbox"/> Project Info  <input type="checkbox"/> Contract         </td> <td data-bbox="1008 174 1307 730"> <b>Product &amp; Install Prices Combined</b>  <u>Entire Proposal</u>    <b>Proposal Sections</b>  <u>view print</u>  <input type="checkbox"/> CPS Cover Page  <input type="checkbox"/> Areas &amp; Products  <input type="checkbox"/> Product Summary  <input type="checkbox"/> Area Summary  <input type="checkbox"/> Project  <input type="checkbox"/> Contract         </td> </tr> <tr> <td colspan="2" data-bbox="716 730 1307 1176"> <b>Additional Proposal Sections</b>  <u>view print</u>  <input type="checkbox"/> Letterhead Cover Pages  <input type="checkbox"/> Area Product Prices - No Area Text  <input type="checkbox"/> Area Summary with tax <input type="checkbox"/> w/Parts Labor  <input type="checkbox"/> Extra Text Pages <input type="checkbox"/> Editable Extra Page  <input type="checkbox"/> Extra Contract Page  <input type="checkbox"/> Technical Services Page  <input type="checkbox"/> Follow-Up Letters  <input type="checkbox"/> Scope of Work Page         </td> </tr> </table>	<b>Product &amp; Install Prices Separate</b> <u>Entire Proposal</u>  <b>Proposal Sections</b> <u>view print</u> <input type="checkbox"/> CPS Cover Page <input type="checkbox"/> Areas & Products <input type="checkbox"/> Product Summary <input type="checkbox"/> Area Summary <input type="checkbox"/> Project Info <input type="checkbox"/> Contract	<b>Product &amp; Install Prices Combined</b> <u>Entire Proposal</u>  <b>Proposal Sections</b> <u>view print</u> <input type="checkbox"/> CPS Cover Page <input type="checkbox"/> Areas & Products <input type="checkbox"/> Product Summary <input type="checkbox"/> Area Summary <input type="checkbox"/> Project <input type="checkbox"/> Contract	<b>Additional Proposal Sections</b> <u>view print</u> <input type="checkbox"/> Letterhead Cover Pages <input type="checkbox"/> Area Product Prices - No Area Text <input type="checkbox"/> Area Summary with tax <input type="checkbox"/> w/Parts Labor <input type="checkbox"/> Extra Text Pages <input type="checkbox"/> Editable Extra Page <input type="checkbox"/> Extra Contract Page <input type="checkbox"/> Technical Services Page <input type="checkbox"/> Follow-Up Letters <input type="checkbox"/> Scope of Work Page	
Area	Prod	List	Sales															
Text	Text	Price	Tax															
Y	Y	N	Y															
<b>Product &amp; Install Prices Separate</b> <u>Entire Proposal</u>  <b>Proposal Sections</b> <u>view print</u> <input type="checkbox"/> CPS Cover Page <input type="checkbox"/> Areas & Products <input type="checkbox"/> Product Summary <input type="checkbox"/> Area Summary <input type="checkbox"/> Project Info <input type="checkbox"/> Contract	<b>Product &amp; Install Prices Combined</b> <u>Entire Proposal</u>  <b>Proposal Sections</b> <u>view print</u> <input type="checkbox"/> CPS Cover Page <input type="checkbox"/> Areas & Products <input type="checkbox"/> Product Summary <input type="checkbox"/> Area Summary <input type="checkbox"/> Project <input type="checkbox"/> Contract																	
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Print Follow-up Letters	Client Letters	Trade Letters	Referral Bonus
<b>Print All Letters</b> <b>Use Letterhead</b>	<b>Print All Letters</b> <b>Use Letterhead</b>	<b>Print All Letters</b> <b>Use Letterhead</b>	<b>Print All Letters</b> <b>Use Certificates</b>
Cory & Sara Cahn  Electronic Systems <b>PROPOSAL: 1640-00</b>	<b>View Print</b> <input type="checkbox"/> Post Consultation <input type="checkbox"/> Post Proposal <input type="checkbox"/> Acceptance <input type="checkbox"/> Rejection <input type="checkbox"/> In Progress <input type="checkbox"/> Sales Specialist Thankyou <input type="checkbox"/> Presidents Thankyou	<b>View Print</b> <input type="checkbox"/> Architect <input type="checkbox"/> Builder <input type="checkbox"/> Electrician <input type="checkbox"/> Decorator <input type="checkbox"/> Cabinet Maker <input type="checkbox"/> Painter	<b>View Print</b> <input type="checkbox"/> Architect <input type="checkbox"/> Builder <input type="checkbox"/> Electrician <input type="checkbox"/> Decorator <input type="checkbox"/> Cabinet Maker <input type="checkbox"/> Painter <input type="checkbox"/> Referral Bonus <input type="checkbox"/> Blank Bonus
<b>Done</b> <b>Select New Proposal</b> <b>Utility</b>	Print: <input checked="" type="radio"/> Yes Today's Date: <input type="radio"/> No Print Address: <input checked="" type="radio"/> CURRENT <input type="radio"/> JOBSITE		
Cory & Sara Cahn 116 Charleston Park Metairie, LA 70005		Sales Specialist: Jeff Edenfield System Designer President: Jeff Edenfield System Designer In Progress Payment: \$7000.00 Referral Bonus: \$0.00	

Fix: Follow-Up: Switching Proposals now properly brings in the Proposal Number

Print Follow-up Letters	Client Letters	Trade Letters	Referral Bonus
<b>Print All Letters</b> <b>Use Letterhead</b>	<b>Print All Letters</b> <b>Use Letterhead</b>	<b>Print All Letters</b> <b>Use Letterhead</b>	<b>Print All Letters</b> <b>Use Certificates</b>
Mr. & Mrs. Thomas  Electronic Systems <b>PROPOSAL: 142500</b>	<b>View Print</b> <input type="checkbox"/> Post Consultation <input type="checkbox"/> Post Proposal <input type="checkbox"/> Acceptance <input type="checkbox"/> Rejection <input type="checkbox"/> In Progress <input type="checkbox"/> Sales Specialist Thankyou <input type="checkbox"/> Presidents Thankyou	<b>View Print</b> <input type="checkbox"/> Architect <input type="checkbox"/> Builder <input type="checkbox"/> Electrician <input type="checkbox"/> Decorator <input type="checkbox"/> Cabinet Maker <input type="checkbox"/> Painter	<b>View Print</b> <input type="checkbox"/> Architect <input type="checkbox"/> Builder <input type="checkbox"/> Electrician <input type="checkbox"/> Decorator <input type="checkbox"/> Cabinet Maker <input type="checkbox"/> Painter <input type="checkbox"/> Referral Bonus <input type="checkbox"/> Blank Bonus
<b>Done</b> <b>Select New Proposal</b> <b>Utility</b>	Print: <input checked="" type="radio"/> Yes Today's Date: <input type="radio"/> No Print Address: <input checked="" type="radio"/> CURRENT <input type="radio"/> JOBSITE		
Mr. & Mrs. Thomas		Sales Specialist: Jeff Edenfield Systems Designer President: Jeff Edenfield System Designer In Progress Payment: \$7000.00 Referral Bonus: \$0.00	

Fix: POS/All Invoices: After previewing any POS Invoice now returns to the Invoice

**Print/Preview:** **Cost:**

**Duplicate Quote** **Convert Invoice**

**Quotation**  
QT #7206

**Costing** **Set Up** **Done**

**Vendor:** ☐ Done **Address 2:** 3/30/2015

Jim Engandela  
Horizon Software  
S. 15700 Hwy U.  
Strum, WI 54770  
Work: 715-287-3335  
Fax: 715-287-4464

Jim Engandela  
Horizon Software

Reference Description:

HOURS TOTAL 0.00

Ship VIA Payment Terms Your # Our # Sales Rep

Quotation prices good for 30 days

Pick	QTY	unit	PRODUCT DESCRIPTION	Install min. sec	PRICE	TOTAL	Product Tax
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>

Enhancement: Product Library: Product1 Value List (field) Improvement

Version 8.0v6

Enhancement: Setup/Other Defaults: 300% Screen Magnification

You can now enlarge your screen to 300% for high resolution monitors.

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text		Multi Company		<b>Other Defaults 1</b>			? 
<b>CPS System Settings</b>							
<div style="display: flex; justify-content: space-between;"> <div style="width: 20%;"> <div style="border: 1px solid black; background-color: yellow; padding: 5px; margin-bottom: 5px; text-align: center;">Run CPS in Secure Mode</div> <div style="border: 1px solid black; background-color: yellow; padding: 5px; margin-bottom: 5px; text-align: center;">Enable FileMaker Menus</div> <div style="border: 1px solid black; background-color: yellow; padding: 5px; margin-bottom: 5px; text-align: center;">Open Print Setup</div> <div style="border: 1px solid black; background-color: yellow; padding: 5px; margin-bottom: 5px; text-align: center;">Open File Sharing</div> <div style="border: 1px solid black; background-color: yellow; padding: 5px; text-align: center;">Set Spell Checker</div> </div> <div style="width: 60%;"> <p>It is <b>recommended</b> that you run CPS in the Secured Mode during the normal operation of the Custom Proposal System to prevent accidental misuse the program.</p> <p><b>Please note:</b> In order for this feature to work it is necessary to</p> <ol style="list-style-type: none"> <li>1. Copy the file named <b>Securefm.fmx</b> from the CPS Plugin folder into the Program Files/FileMaker/System folder.</li> <li>2. Then restart FileMaker and click on the Set Software Preferences (on this screen) and click on the Plug-In's tab and make sure the <b>SecureFM Plug In</b> is checked.</li> </ol> </div> <div style="width: 15%; text-align: right;"> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px; text-align: center;">Next</div> <div style="border: 1px solid black; padding: 5px; text-align: center;">Done</div> </div> </div>							
<div style="border: 1px solid black; background-color: #d3d3d3; padding: 5px; margin-bottom: 5px; text-align: center;">Open Print Setup</div> <div style="border: 1px solid black; background-color: #d3d3d3; padding: 5px; margin-bottom: 5px; text-align: center;">Open File Sharing</div> <div style="border: 1px solid black; background-color: #d3d3d3; padding: 5px; text-align: center;">Set Spell Checker</div>		<div style="text-align: center; font-weight: bold;">SCREEN MAGNIFICATION</div> <div style="border: 1px solid black; width: 80px; margin: 0 auto; text-align: center; padding: 2px;">300%</div> <p>Magnify the CPS screens for high resolution monitors. Blank = 100%</p> <p>Please note some onscreen button text might not align properly at higher magnification</p>		<div style="text-align: center; font-weight: bold;">WINDOW SETTINGS</div> <div style="border: 1px solid black; width: 80px; margin: 0 auto; text-align: center; padding: 2px;">Maximize</div> <p>Maximize expands the CPS windows to the full computer screen.</p> <p><b>Recommended:</b> Minimize shrinks the CPS windows to the size of the CPS program.</p>			

Fix: POS/PO: Pick Products now returns correct products

Print/Prev 1  2  3		<b>Purchase Order</b>		?		<div style="border: 1px solid black; padding: 2px; display: inline-block;">Set Up</div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-left: 10px;">Done</div>	
VENDOR: <span style="border: 1px solid black; padding: 2px;">House Gadget Stock 1402 8564 Washington Blvd Culver City, CA 90232</span>		Duplicate PO <span style="border: 1px solid black; padding: 2px;">1/20/2016</span>		Ship To: <span style="border: 1px solid black; padding: 2px;">SHOP WAREHOUSE EME Audio &amp; Video Systems 414 W Ridgemont Strum, WI 54770</span>		Work: 310-202-8083 Cellular: 608-736-7814	
Reference Description: <span style="border: 1px solid black; display: inline-block; width: 200px; height: 1.2em;"></span>							
Need By		Reference #		Ship VIA		Invoice #	
						Standard Terms	
						Buyer Jim Engandela	
Pick	QTY	unit	PRODUCT DESCRIPTION	PRICE	TOTAL	OPEN QTY RCVD	QTY OPEN
	1	ea	LINN: TUNE BOX: ACCESSORIES: TO HOUSE ACTIVE CARDS (MONO ONLY):	77.00	77.00		1
	2	ea	LINN: LK DIREKTOR: CONTROL AMPLIFIER: STANDALONE ROOM	900.00	1800.00		2
	1	ea	LINN: SNEAKY LINE DRIVER: KNEKT MULTIROOM CONTROL: SNEAKY LINE	150.00	150.00		1
	3	ea	LINN: VALHALLA: LP 12 UPGRADES: POWER SUPPLY 33 RPM	285.00	855.00		3
Pick						RCVD	OPEN

Version 8.0v5

Enhancement: Product Library/Find Products without Sell Price



Check One		Enter all of your desired Find criteria and then click Done		Done	
<input type="radio"/> Understocked (-) <input type="radio"/> Overstocked (+)					
Make:		Department:		Product Tax:	
Model:		SKU#:		No Labor Tax:	<input type="checkbox"/>
Category:		Location:			
Description:		Supplier:			
Features:		Parts:		Phase:	
				Favorite:	
				Opt Qty:	
				Qty Dif:	
Unit:		CALCULATOR	A%	B-shipping	ACTUAL PRODUCT PRICE
Net Cost:			%		
Sell Price:			%	GP:	SELL PRICE:
List Price:					LIST PRICE:
Installation:		Min.Sec		Charge:	INSTALLED PRICE:
Specifications		Rack Spaces:			
Finish:		Dimensions: W	H	D	Base Wire \$:
Weight:		Warranty:			
AC Power:		Install Notes:			
DC Power:					
Created:		Find Products with or without Labor		Find Products without a Sell Price	
Modified:					

Version 8.0v4

#### Fix POS Labor Tax

Tax Exempting Line Item labor Tax was removing the Product Tax as well. This has been corrected.

Version 8.0v1

#### Enhancement – Product Set Packages

Establishing a Product Set as a Package enables you to add a Package Products in your Product Library and then add it to a Product Set. You can then make this Product the Set Package Product, by click on the pkg button. When you bring in a Package set into your Proposal the Set Package Product will show up first and then the Subset Products will show underneath it with an indent character or space.

If the Set Package Product has a total price of all the Subset Products you can choose to not show the Subset Product prices in the Proposal and just have the Set Package Product show the price of the whole set.

The set mechanism has been improved so that Sets add to a Proposal that are not Package Sets do not show the Indent character or space.

Setup/Other Defaults/Default 7 Set Preference

## Product Sets "Package" Options

Clear "Package" Subset Product Prices

If this flag is No, then using the Sets Package Option will **Not** Zero the Cost/Sell/List prices of the Subset Products in the Set and in the Proposal. If Yes or Blank then it will Zero them out.

Subsets Indent Charactor (\* - space)  (default: \* )

Sets/Subsets: Subset Product assigned as the Set Package Product

Add Another Product Subset

### SubSet Products

Subset products must exist in the product database

**ACTIVE KELTIK SYSTEM**
Total Set Price: \$20,000.00
Delete Subset

ACTIVE KELTIK SYSTEM WITH CD12, 5103 AND KLIMAX AMPLIFICATION

Qty	Pick List	Make	Model	Category - Description	Sell	Pick Library	Pkg
1		ea	LINN	CD12	COMPACT DISC PLAYER -		
1		ea	LINN	AV 5103RF	LINN AV51 SYSTEM -		
8		ea	LINN	KLIMAX 500 SOLO	POWER AMPLIFIER - 500W		
2		ea	LINN	KLIMAX TUNE BOX	LOUDSPEAKER UPGRADES -		
1		pr	LINN	KELTIK AKTIV	LOUDSPEAKER - BLACK		
9		pr	LINN	SILVER	ACCESSORIES - RCA		
6		m	LINN	K600 CABLE	ACCESSORIES - TRI-WIRE		
6		m	LINN	K20 CABLE	ACCESSORIES -		
1		ea	LNN	PACKAGE 1	VIBRATION CONTACT,	20000.00	

#### Message





This Feature will set this Subset as the Package Subset. First Add a Product in the Product Library with the Set Name in the Make-Model-Description and add it to this set with a Qty of 1. It will be sorted first and will zero the prices of all other Subsets and show the total pkg price entered on this pkg product, if the Setup Set Pkg Otion is "No"

OK
Cancel

Proposal Product:

The first Package Set with the Total price, no product prices and the Indent \* character.

The second set shows how products in a regular set are shown in a Proposal.

Project	Purchasing	Proposal Detail			Pricing	Done
Areas	Work Orders	New Build			Set Up	Change Orders
Products	Invoicing	 	1656.00	 	Tracker	Print Menu
Selected Phase	Sold Done	Products: \$41,021.00	Install: \$1,925.00	Misc: \$7,551.05	Subtotal:	\$50,497.05
All Phases	<input type="checkbox"/> <input type="checkbox"/>	HP: \$1,183.05	Hours: 27.5	GP: 68.8%	Grand Total:	\$53,551.06
SYSTEM DESIGN A carefully engineered distributed audio system will provide music listening						
APARTMENT This area includes the following products and features:						
1 ea	LINN - PACKAGE 1 -					20,000.00
1 ea	*LINN - CD12 - COMPACT DISC PLAYER - REMOTE CONTROL CD PLAYER					
1 ea	*LINN - AV 5103RF - LINN AV51 SYSTEM - SYSTEM CONTROLLER WITH DTS					
8 ea	*LINN - KLIMAX 500 SOLO - POWER AMPLIFIER - 500W MONO BLOCK AMPLIFIER					
2 ea	*LINN - KLIMAX TUNE BOX - LOUDSPEAKER UPGRADES - TUNE BOX FOR					
1 pr	*LINN - KELTIK AKTIV - LOUDSPEAKER - BLACK ASH, ROSENUOT OR CHERRY					
9 pr	*LINN - SILVER INTERCONNECT CABLES - ACCESSORIES - RCA INTERCONNECTS					
6 m	*LINN - K600 CABLE - ACCESSORIES - TRI-WIRE SPEAKER CABLE/METRE					
6 m	*LINN - K20 CABLE - ACCESSORIES - LOUDSPEAKER CABLE/METRE					
1 ea	LINN - ARKIV - CARTRIDGE - MOVING-COIL CARTRIDGE					2,200.00
1 ea	LINN - EKOS - TONEARM BLACK					2,695.00
1 ea	LINN - IKEMI - COMPACT DISC PLAYER - REMOTE CONTROL CD PLAYER BLACK					3,595.00
4 m	LINN - K600 CABLE - ACCESSORIES - TRI-WIRE SPEAKER CABLE/METRE					136.00
1 pr	LINN - KEILIDH AKTIV (3-WAY) - CHERRY/ROSENUOT - LOUDSPEAKER -					2,020.00
1 pr	LINN - KEILIDH/KABER STAND					230.00
1 ea	LINN - KOLEKTOR - CONTROL AMPLIFIER - REMOTE CONTROL PREAMPLIFIER					990.00
1 ea	LINN - LINGO - LP 12 UPGRADES - POWER SUPPLY 33/45 RPM BLACK					1,550.00
1 ea	LINN - LINTO - LP 12 UPGRADES - DIRECT COUPLED PRECISION PHONO					1,600.00
3 ea	LINN - LK 85 - POWER AMPLIFIER - STEREO POWER AMPLIFIER BLACK					2,685.00
4 pr	LINN - SILVER INTERCONNECT CABLES - ACCESSORIES - RCA INTERCONNECTS					1,200.00
1 ea	LINN - SONDEK LP-12 - CHERRY, WALNUT OR ROSENUOT - TURNTABLE -					1,875.00
1 ea	LINN - TRAMPOLIN BASE - LP 12 UPGRADES - BASE BOARD FOR LP 12					245.00

Enhancement - Setup/Other Defaults 1: Screen Magnification

You can now increase the CPS screen magnification from 100% to 200%. This is helpful when using high resolution monitors.



Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text	Multi Company	<b>Other Defaults 1</b>				?	Next Done

CPS System Settings

**Run CPS in Secure Mode**

**Enable FileMaker Menus**

**Open Print Setup**

**Open File Sharing**

**Set Spell Checker**

It is **recommended** that you run CPS in the Secured Mode during the normal operation of the Custom Proposal System to prevent accidental misuse the program.

**Please note:** In order for this feature to work it is necessary to

1. Copy the file named **Securefm.fmx** from the CPS PlugIn folder into the Program Files/FileMaker/System folder.
2. Then restart FileMaker and click on the Set Software Preferences (on this screen) and click on the Plug-In's tab and make sure that the **SecureFM Plug In** is checked.

SCREEN MAGNIFICATION

100%

Magnify the CPS screens for high resolution monitors.  
Blank = 100%

Please note some onscreen button text might not align properly at higher magnification

WINDOW SETTINGS

Maximize

Maximize expands the CPS windows to the full computer screen.

**Recommended:**  
Minimize shrinks the CPS windows to the size of the CPS program.

### Enhancement – Reset Proposal Series Numbers

Horizon can now reset your proposal numbers once they reach 9999 so that they can be saved as new lower numbers thereby given you headroom to create more proposals.

Delete Blank Records		<b>Proposal</b>		Done		X accepted Sold NotSold		Reset Proposal Series Number	
Find All		<b>Debug Detail</b>							

Zone	Area	Change # X Class	Qty	Mfg	Model	Description	Install Minutes	Price Unit Total	PROPOSAL NUMBER	PREVIOUS NUMBER	Repeat NEW	dknew.c	FINDPROPOSAL AREA?
Sold: <input type="checkbox"/> Capitol Sales Company Placement: Custom Audio & Video System													
SYSTEMDESIGN <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> This proposal represents a design carefully prepared with your requirements, our													
<input type="checkbox"/> 1 100100 1000000000000 <input type="checkbox"/> ZX 100100 100100628834													

### Enhancement – POS: Pick Products return to POP UP Qty field

When picking products into a POS invoice the Qty field now pops up automatically to make it easy to enter product quantities.

### Fix – Project Change Order Tax

The Tax calculation on Project Change Orders has been improved to accurately represent the total change order tax based on the default tax rates for the Project the Change Order belongs to.

The Change Order screen now shows the CO# and enables you to sort by the CO#. Products on this screen now also show the unit and extended sell price.

A 2hr PAV + EXTRA LABOR + LABOR

0.60

Labor to install and interface Audio Video Components.  
Labor to run New Network Wire to Pool Equipment area

TOTAL:	24,00
--------	-------

I authorize these changes to be made to proposal: 1237-00 v1

Date: \_\_\_\_\_

Client Signature: \_\_\_\_\_

Authorization: \_\_\_\_\_

Products:	853.00
Installation:	857.50
Parts & Material:	85.75
<b>Sub Total:</b>	<b>\$1,796.25</b>
Tax:	100.59
<b>Grand Total:</b>	<b>\$1,896.84</b>

Add Areas & Products	Pricing Parts & Labor	Modify Change Order	Change Orders				Find C-Orders				Done
			David & Kathy Karademas				Area Text	Prod Text	List Price	Sales Tax	View/Print C-Orders
Subtract Products			Zone Area	Show All Sort #	P=Proposed C=Changed A=Added D=Deleted						
			CO#	Class	Qty	Make	Model	Category-Description			
	THEATER		P	1 ea	PAV - EXISTING PREAMP - SURROUND SOUND						
	THEATER		P	1 ea	PAV - EXISTING 5 CH AMP - EXISTING EQUIPMENT						
	THEATER		P	1 ea	PAV - EXISTING BLU-RAY DVD - BLU-RAY DVD						
	THEATER		P	1 ea	PAV - EXISTING GAME CONSOLE - VIDEO GAME						
	THEATER		P	1 ea	PAV - EXISTING HD CABLE BOX - CABLE BOX						
	THEATER		P	2 ea	SONOS - CONNECT - ZONE PLAYER 90 OFF WHITE						
	THEATER		P	4 ea	SONOS - CONNECT:AMP - ZONE PLAYER 120 OFF						
	THEATER		P	1 ea	SPEAKERCRAFT - VITAL 850 - 8 CH AMP BLACK						
	THEATER		P	1 ea	UNIVERSAL REMOTE - MX890 - RF COLOR						
	THEATER		P	1 ea	UNIVERSAL REMOTE - MXIOS-MRX-KIT -						
	THEATER		P	2 ea	BINARY - B3-AUD-2 - ANALOG AUDIO 2M GREY						
	THEATER		P	1 ea	COOL COMPONENTS - TCALTV2 - TEMPERATURE						
	THEATER		P	1 ea	COOL COMPONENTS - VS-HFB - DUAL FAN BLACK						
	THEATER		P	1 ea	PANAMAX - M5100PM - POWER CONDITIONER						
	BALLROOM/BAR 3RD		P	1 ea	CROWN - CDI1000 - AMPLIFIER BLACK						
	BALLROOM/BAR 3RD		P	2 ea	SONOS - CONNECT - ZONE PLAYER 90 OFF WHITE						
	BALLROOM/BAR 3RD		P	8 ea	EPISODE - EA-MR-COMM-SPKT-25 - 70VOLT TAP						
	BALLROOM/BAR 3RD		P	1 ea	PANAMAX - PM8AV - SURGE PROTECTOR GREY						
	BALLROOM/BAR 3RD		P	2 ea	BINARY - B3-AUD-1 - ANALOG AUDIO 1M GREY						
	BALLROOM/BAR 3RD		P	2 ea	RDL - T-102 - CONVERTER BLACK						
	THEATER		1 A	2 ea	BINARY - B6-HD-1 - SERIES 6 HDMI 1M BLACK						
	THEATER		1 A	1 hr	PAV - SERVICE REPAIR - SERVICE REPAIR						
	THEATER		1 A	1 set	WYRESTORM - EX-1UTP-IR-40 - HDMI EXTENDER						
	THEATER		1 A	1 ea	XANTECH - CC12 - REMOTE RELAY BLACK						
	BALLROOM/BAR 3RD		1 A	110 ft	GENESIS CABLE - CAT5E BLUE - CAT5E BLUE						
	BALLROOM/BAR 3RD		1 A	2 hr	PAV - EXTRA LABOR - LABOR						
	OFFICE		1 A	1.5 hr	PAV - EXTRA LABOR - LABOR						
	SWIMMING POOL		1 A	120 ft	GENESIS CABLE - CAT5E BLUE - CAT5E BLUE						



## Version 7.9v38

### Enhancement – Proposal/Products/Pick Product Pop Up: Constrain Listing

By constraining the Product Listing in the POP field CPS puts less strain on Computer Video drivers and reduces the possibility of CPS crashing.

## Version 7.9v37

### Enhancement - POS/Purchase Orders: Reference Description field

The Reference Description field now appears on the Purchase Order Print out.

**Purchase Order**

Print/Prev 1 2 3 Print Store Copy Duplicate Purchase Order PO #6115 ? Set Up Done

Vendor: Frank Blais  
Panasonic Canada  
5770 Ambler Drive  
Mississauga, ON L4W 2T3  
Work: 905-238-2237  
Returns 1-800-517-1101  
Cellular: 416-817-3996  
Fax: 905-238-2314

Ship To: Shop Warehouse:  
Synergy Systems Group  
147 Citation Drive  
Unit #32  
Concord, ON L4K 2P9

Reference Description:

Need By: 1/28/2005 Reference #: ENNS Ship VIA: Invoice #: Terms: Buyer: Doug Gilpin

Pick	QTY	unit	PRODUCT DESCRIPTION	PRICE	TOTAL
	1	ea	PANASONIC : *KX-T30865 : DOORPHONE	38.00	38.00
	4	ea	PANASONIC : KX-TD7690 : 2.4 GHZ 5-LINE WIRELESS PHONE	390.00	1560.00
	1	ea	PANASONIC : KX-TDA30 : HYBRID IP PBX WITH MAIN PROCESSOR CARD	550.00	550.00
	2	ea	PANASONIC : KX-TDA3172 : 8-PORT DIGITAL LINE CARD	200.00	400.00
	1	ea	PANASONIC : KX-TDA3161 : 4-PORT DOORPHONE CARD	160.00	160.00
	4	ea	PANASONIC : KX-T7633B : 3-LINE LCD DIGITAL DISPLAY PHONE : BLACK	210.00	840.00
	1	ea	PANASONIC : KX-TDA3193 : 4-PORT CALLER ID CARD	105.00	105.00
	2	ea	PANASONIC : KX-T7665B : 1-LINE LCD DIGITAL DISPLAY PHONE : BLACK	90.00	180.00
	2	ea	PANASONIC : KX-TDA0141 : 2-CHANNEL CELL STATION	390.00	780.00





Detail List	Product Utilities	All 11	Proposal Products					Find Replace	Proposal Areas	Done			
Sort			Line List					?					
Joseph Farrar - Munholland United Methodist													
Click on Area to show only that Area			View	Delete	Pick	Qty	Make	Model	Unit	Unit Sell	Total Sell	Unit List	Total List
			↓ Add	↓ Place	↓								
Zone-Area			Products: \$4,191.00		Install: \$736.00		Misc Parts: \$209.55		Sub Total:		\$5,136.55		
In FRONT EQUIPMENT						2	RANE	PE-15	ea	399.00	798.00	449.00	
In FRONT EQUIPMENT						1	SABINE	SDA-102	ea	429.00	429.00	429.00	
In FRONT EQUIPMENT						1	QSC	121900	ea	699.00	699.00	745.00	
In FRONT EQUIPMENT						1	QSC	USA400	ea	599.00	599.00	625.00	
In FRONT EQUIPMENT						1	MARSH	9040	ea	450.00	450.00	600.00	
In FRONT EQUIPMENT						1	RAMSON	SERVO-170	ea	299.00	299.00	369.00	
In FRONT EQUIPMENT						1	FURMAN	MINI-PORT	ea	149.00	149.00	169.00	
In FRONT EQUIPMENT						1	ATLAS/SOUNDOLI	400-31	ea	349.00	349.00	431.00	
In FRONT EQUIPMENT						5	NUTONE	NT-CT600	ea		0.00		
In FRONT EQUIPMENT						1	MIDDLE	HP	ea	20.00	20.00	20.00	
In FRONT EQUIPMENT						1	RANE	SM26B	ea	399.00	399.00	449.00	

Index Product Value List field in "Proposal"

Field Name	Type	Options
* PRODUCT VALUE LIST	Text	Indexed

Fix - POS: Show 0 on POS Sales Invoices with no Remaining Balance

If the Remaining Balance on POS Invoices = 0 then the 0 will now show instead of being blank.

SEND BACK TO UNIVERSAL FOR REPAIR OF THE CONTACT BOTTOM ON VOLUME ON THE REMOTE. PLEASE CHECK ALL FUNCTIONS.		Sub Total: 50.00
		Installation:
		Tax:
		Freight:
		Total: 50.00
PAYMENTS & DESCRIPTION:		- TOTAL PAYMENTS: 50.00
Date: _____		REMAINING BALANCE: 0.00
Signature _____		

Fix - POS: Find This POS or All POS

When leaving a POS invoice you have the option to show only those invoices or all invoices. This now works properly under all conditions.

Find P.O.		All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Print List ?		<b>PURCHASE ORDERS</b> click on purchase order to view																								Done		
#	Invoice	Company	Reference	Date	Buyer	P.O. Status	P.O. Amount	Del																				
PO #6176		Gramophone		9/4/2012	John Gilmore	Open	\$2,163.00																					
PO #4663				3/13/2009	John Gilmore																							
PO #3583		Combat Baseball		10/5/2007	John Gilmore	Open	\$924.00																					
PO #3550		McIntosh La				Open	\$0.00																					
PO #3319		Runco				Open	\$495.00																					
PO #3181		McIntosh La				Open	\$6,000.00																					
PO #3100		Famous Stars				Open	\$0.00																					
PO #3097		Preference																										
PO #3096		Hitachi				Open	\$8,265.00																					
PO #3090		Premier Mou				Open	\$2,279.68																					
PO #3089		Middle Atlante		1/11/2007	John Gilmore																							

Message

Show all Clients/Vendors or all for This Client/Vendor?

Fix - POS: Pick Products return to POP UP Qty field

When Picking Products on all POS invoices the Qty Pop up field now opens at the then of the Pick routine

Reference Description:		Ship VIA	Payment	Terms	Your #	Our #	Sales Rep	
		AVV Truck	Amex	Quotation prices good for 30 days			David Welch	
Pick	QTY	unit	PRODUCT DESCRIPTION		Install min sec	PRICE	TOTAL	Tax
	1	ea	AIWA - AVD55 - RECEIVER 100WX5 DOLBY DIG READY		60.00	160.00	160.00	T
	1	ea	AIWA - AVDV75 - RECEIVER 120WX5 DOLBY DIGITAL			400.00	400.00	T
	2	ea	LINN : 5101 PERSONAL HANDSET : 5764 : ACCESSORIES : UNIVERSAL		30.00	390.00	780.00	T
		ea	LINN : KNEKT RCU - WHITE : ACCESSORIES : KNEKT ROOM CONTROL		30.00	340.00	0.00	T
		set	LINN : SKEET : ACCESSORIES : FLOOR PROTECTORS : BLACK		1.00	75.00	0.00	T
	1							
	2							
	3							
	4							
	5							
	6							
	7		LINN : LK DIREKTOR : CONTROL AMPLIFIER : STANDALONE ROOM		30.00	1500.00	3000.00	T
	8							
	9							
	10							
	15							
	20							
	25							
	50							
	100							
	500							




## Script Definition for "Optimize Windows &amp; Hide Status"

"Optimize Windows &amp; Hide Status"

```

✦ Enter Browse Mode []
✦ Toggle Status Area [Hide]
✦ If ["Setup Constant:Window Setting="Maximize""]
✦   Toggle Window [Maximize]
✦ Else
✦   Toggle Window [Zoom]
✦ End If
✦ If ["Status( CurrentLayoutName) = "DOCK CREATE INVOICE" or Status( CurrentLayoutName) = "DOCK EXISITING INVOICES""]
✦   Perform Script [Sub-scripts, "sub.optScreenMag"]
✦ End If

```



Status( CurrentLayoutName) = "DOCK CREATE INVOICE" or

Status( CurrentLayoutName) = "DOCK EXISITING INVOICES"

Version 7.9v36

Enhancement – Project/Change Orders: Modify CO-Add Area & Add Product

You can now Add New Areas and New Products to a Change Order from the Modify Change Order screen. You can also view the Pricing, Parts & Labor screen.

<b>Add Areas &amp; Products</b>	<b>Pricing Parts &amp; Labor</b>	<b>C-Order Pricing</b>	<b>Modify Change Order Products</b>					<b>?</b>	<b>Done</b>
		<b>View C-Order</b>	Click View Detail to modify Product						
Class: P=Proposed C=Changed A=Added D=Deleted									
<b>View Detail</b>	<b>Delete</b>	<b>Item</b>	<b>Zone</b>	<b>Area</b>	<b>Class</b>	<b>Qty</b>	<b>Make</b>	<b>Model</b>	<b>Category-Description</b>
				APARTMENT	<b>A</b>	1 ea	LINN	5120	AKTIV MODULES - LINN AV51 SYSTEM
				ALTAR	<b>A</b>	3 ea	LINN	AV 5120B	COMPACT LOUDSPEAKER - LINN
				ALTAR	<b>A</b>	1 ea	LINN	AV 5150B	ACTIVE ISOBARIK BASS
				ATRIUM	<b>A</b>	1 ea	LINN	AV 5110	LOCAL SPEAKER - ACCESSORIES -

Enhancement – Option to Sort Proposals and Projects and POS Invoices

You can now choose not to sort Proposals and Projects and Completed Projects when entering these screens. If you have a lot of Proposals and Projects it is often faster to not sort on entry and then Find the Proposals or Projects you want with the Alpha Finder or Header sort buttons. The natural sort order for these screens and Alpha Finder is in Descending order. This can be reversed in Ascending order using the Proposal Number Header button.

Defaults 1 System Settings	Defaults 2 Phases Labor	Defaults 3 Proposal Text	Defaults 4 Contract Headers	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings
Replace Fields with Default Text	Multi Company	<b>Other Defaults 1</b>				?	Next Done

CPS System Settings

Run CPS in  
Secure Mode

Enable  
FileMaker Menus

It is **recommended** that you run CPS in the Secured Mode during the normal operation of the Custom Proposal System to prevent accidental misuse the program.

**Please note:** In order for this feature to work it is necessary to

1. Copy the file named **Securefm.fmx** from the CPS Plugin folder into the Program Files/FileMaker/System folder.
2. Then restart FileMaker and click on the Set Software Preferences (on this screen) and click on the Plug-In's tab and make sure that the **SecureFM Plug In** is checked.

Open Print  
Setup

Open File  
Sharing

Set Spell  
Checker

Set Software  
Preferences

After clicking on this button  
Un-Check "Show Status Line Help"  
Set Memory Cache to 5000  
or  
9999 if you have 32 meg of ram or more.

WINDOW SETTINGS

Minimize

Maximize expands the CPS windows to the full computer screen.

**Recommended:**  
Minimize shrinks the CPS windows to the size of the CPS program.

☐ **Enable SCPS Access**  
Check this box only if you are a Horizon SmartPartner and are using the Super Custom Proposal System.  
  
Note: Only 50 .fp5 files can be in the SCPS folder. Remove SCPSguest.fp5

☒ **Do not Sort Proposals & Projects**  
Check this box if you do not want to Sort when entering the Proposal and Project modules.

☒ **Do not Sort POS Quotes and Invoices**  
Check this box if you do not want to Sort when entering the POS modules.

Exit  
CPS

Enhancement – Open Net auto populate records

When using the OpenNet file to open CPS a routine now checks the Archive, Text, Letters, Task and Info files and if there are no records in those database it automatically creates one so that these files can be shared on the network.

## Version 7.9v35

### Enhancement – Proposal/Product Library POP UP Pick List: Auto Groom

This feature automatically removes carriage returns from the Product POP UP Pick List in your Proposals.

#### PRODUCT1 VALUE LIST

Substitute( Substitute( Trim(Upper(MAKE)) & " - " & Trim(Upper(MODEL)) & " - " & Lower( CAT DESC FINISH) & " - " & "\$" & Round(UNIT SELL CALC,2), "¶" , "" ), "¶" , "" )

#### PRODUCT2 VALUE LIST

Substitute( Substitute( Upper(MAKE) & " - " & Upper(MODEL) & " - " & Lower( CAT DESC FINISH ), "¶" , "" ), "¶" , "" )

#### UNIT SELL CALC

If(CALC FLAG SELL="Unit Cost +A%",

UNIT COST CALC+ (UNIT COST CALC \* (VALUE SELL A/100)),

If(CALC FLAG SELL="Sell Margin =A%",

Round( UNIT COST CALC/((100-VALUE SELL A)/100), 2),

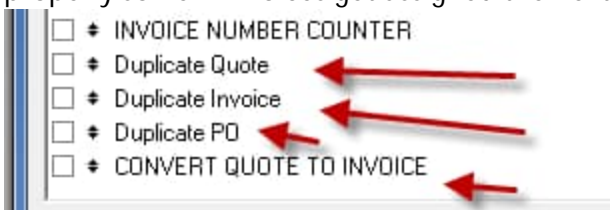
If(CALC FLAG SELL="List Price -A%",

(UNIT LIST CALC-(UNIT LIST CALC \* (VALUE SELL A/100))), UNIT SELL)))

## Version 7.9v34

### Fix – POS/Invoices: Duplicating & Converting Quotes & Invoices Counter Fix

When Duplicating a Quote, Invoice or Converting a Quote to an Invoice the Counter is now incremented properly so new Invoices get assigned the next highest number instead of the same Invoice number.





## "Duplicate Quote"

```

+ Beep
+ Show Message ["Are you sure you want to Duplicate this Quote?"]
+ If ["Status( CurrentMessageChoice) = 2"]
+ Duplicate Record/Request
+ Perform Script [Sub-scripts, "INVOICE NUMBER COUNTER"]
+ If ["0"]
+ Set Field ["Invoice Number", "INVOICE MAX.c + 1"]
+ End If
+ Go to Record/Request/Page [Previous]
+ Omit Record
+ Show Message ["This Quote has been Duplicated. Click on the Setup button to change the Client information on the Quote"]
+ Else
+ Go to Layout [original layout]
+ End If

```

All Dup  
Scripts

## "CONVERT QUOTE TO INVOICE"

```

+ If ["INVOICE KIND="INVOICE"]
+ Beep
+ Show Message ["This is already an invoice. Please click OK to contiune."]
+ Else
+ Beep
+ Show Message ["Do you want to Convert this Quote to an Invoice?"]
+ If ["Status( CurrentMessageChoice) = 1"]
+ Exit Script
+ End If
+ Duplicate Record/Request
+ Perform Script [Sub-scripts, "MASTER 1 FIND INVOICE"]
+ Go to Layout ["SALES INVOICE"]
+ Perform Script [Sub-scripts, "MASTER 2 FIND INVOICE"]
+ Perform Script [Sub-scripts, "INVOICE NUMBER COUNTER"]
+ Clear [Select, "INVOICE KIND # PASTE"]

```

Fix – POS/Invoices: Print after Print Setup

Printing Invoices and Quotation after changing the print driver with the print setup utility now works properly.

Print/Prev 1 2 3		Invoice		Costing	Done
Cost:	Packing List:	SI #1055		Set Up	
Vendor:		Address 2:		11/17/2012	
Capitol Sales Company 3110 Neil Armstrong Blvd. Egan, MN 55121		Work: 800-467-8255  Fax: 800-440-4077		Capitol Sales Company	

Enhancement – POS/Invoices/Packing List: Add 2 more Delivered columns

You now have 6 columns to enter delivered quantities on a POS Invoice Packing List

**Print/Prev 1 2 3** **Costing** **Done**  
**Cost:** **Packing List:** **Duplicate Sales Invoice** **Set Up**  
**Invoice** SI #1042

Address 1: Rocky Buldo  
AVID  
P.O. Box 768802  
Roswell, GA 30076  
Work: 404-871-5990  
Fax: 770-752-9025

Address 2: Rocky Buldo  
AVID  
6/14/1999

Reference Description: xxxxx  
Ship VIA Payment Terms Your # Proposal # Sales Rep  
Customer Payment On Delivery David Welch

**Packing List**  
Delivered  
Date Qty Date Qty Date Qty Date Qty Date Qty Date Qty B/O Qty

**Pick:** QTY unit PRODUCT DESCRIPTION Install min sec PRICE TOTAL Tax

1	ea	ADVENT - AW810 - SPKR WIRELESS OUTDOOR WATER RESISTANT		129.99	129.99	T	12/30/12									1
3	ea	AIWA - CADW635 - PORT STEREO 3PC 10W DIGITAL RC Q-SUR		139.95	419.85	T		1								2
4	ea	AIWA - TSW60 - SUBWOOFER 120W AMPLIFIER 8		200.00	800.00	T		1	1	1	1	1	1	1	1	-2
3	ea	LINN - AV 5110 LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER -		325.00	975.00	T										3

EME Audio & Video Systems  
S15700 Hwy U  
Strum, WI 54770  
Ph: (715) 287-3335 Fax: (715) 287-4464

**EME**  
**audio & video**

**PACKING LIST**  
SI #1042  
6/14/1999  
Permit: 1234

Address 1: Rocky Buldo  
AVID  
P.O. Box 768802  
Roswell, GA 30076  
Work: 404-871-5990  
Fax: 770-752-9025

Address 2: Rocky Buldo  
AVID

Ship VIA Payment Terms Your # Our # Sales Rep  
Customer Pickup Payment On Delivery David Welch

12/30/12

Delivered Dates & Qty							B/O Qty	QTY SOLD	PRODUCT DESCRIPTION
							1	1 ea	ADVENT - AW810 - SPKR WIRELESS OUTDOOR WATER RESISTANT
1							2	3 ea	AIWA - CADW635 - PORT STEREO 3PC 10W DIGITAL RC Q-SUR
1	1	1	1	1	1	1	-2	4 ea	AIWA - TSW60 - SUBWOOFER 120W AMPLIFIER 8
							3	3 ea	LINN - AV 5110 LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER - BLACK/WHITE

Enhancement – Contacts/Utility: Export Contacts to Quickbooks 2011 or higher  
You can now select the Contacts you want to Export to QB and then go into the Contact Utility screen and export them to a CSV file which can be opened in the QB Excel Template and then imported into Quickbooks.

**Export to Quickbooks 2011 >** Export this .csv file. Open it in the QB Excel Template. Import the QB Excel Template into Quickbooks.

COMPANY NAME = PRIME COMPANY  
SALUATION = PRIMARY SALUTATION  
FIRST NAME = PRIME FN  
MIDDLE INITAL = PRIME INITIAL EMPTY  
LAST NAME = PRIME LN  
DISPLAY NAME AS = PRIMARY CLNT COMPANY  
STREET ADDRESS 1 = PRIMARY ADDRESS  
STREET ADDRESS 2 = PRIME ADDRESS 2 EMPTY  
CITY = PRIMARY CITY  
STATE = PRIMARY ST  
ZIP = PRIMARY ZIP  
PHONE = PRIME PHONE NO LABEL  
FAX = PRIME FAX  
ALT PHONE = CLNT CAR PHONE  
EMAIL = PRIMARY EMAIL  
ACCOUNT NUMBER = ACCOUNT NUMBER EMPTY

## Enhancement – Proposal/Product Detail return to Product List Area

When you click on the Product button in the Product Detail screen you will now go to the Product List screen and be viewing only the Products in the Area you were in. You can always click on the All button to see all Products in All Areas.

<b>Add Area</b>	<b>Pick Sets</b>	<b>Proposal Product Detail</b>			<b>Done</b>
<b>Add Product</b>	<b>Pick Products</b>	Jim Engandela - Horizon Software			<b>Areas</b> <b>Products</b>
<b>Add product to Product Library</b>	<b>Pick</b>	<b>DEN</b>			
Qty: 1	Make: LINN	Department:			
Model: KEILIDH AKTIV (3-WAY) -	SKU#:				
Category: CHERRY/ROSENUT	Location:				
Description: CHERRY/ROSENUT (INC. AKTIV	Supplier: LINN PRODUCTS				
Features: Versatile floor-standing loudspeaker delivering an outstanding level of performance and value with a wide range of source, control and playback	Parts:			Tax: T	
<b>Spell</b>				Phase: 0	
				Placement: n	

Detail List	Product Utilities	All	14	Proposal Products				Find/Replace	Proposal Areas	Done
				Line List						
				Jim Engandela - Horizon Software						
Click on Area to show only that Area				View	Delete	Pick		Unit	Total	
				↓ Add	↓ Place	↓ Qty	Make	Model	Sell	List
Zone-Area				Products: \$21,411.00		Install: \$1,540.00	Misc Parts: \$3,270.55	Sub Total:	\$26,221.55	
On DEN				1	LINN	ARKIV	ea	2200.00	2200.00	2,200.00
On DEN				1	LINN	EKOS	ea	2695.00	2695.00	2,695.00
On DEN				1	LINN	IKEMI	ea	3595.00	3595.00	3,595.00
On DEN				4	LINN	K600 CABLE	m	34.00	136.00	34.00
On DEN				1	LINN	KEILIDH AKTIV	pr	2020.00	2020.00	2,020.00
On DEN				1	LINN	KEILIDH/KABER	pr	230.00	230.00	230.00
On DEN				1	LINN	KOLEKTOR	ea	990.00	990.00	990.00
On DEN				1	LINN	LINGO	ea	1550.00	1550.00	1,550.00
On DEN				1	LINN	LINTO	ea	1600.00	1600.00	1,600.00
On DEN				3	LINN	LK 85	ea	895.00	2685.00	895.00
On DEN				4	LINN	SILVER	pr	300.00	1200.00	300.00
On DEN				1	LINN	SONDEK LP-12 -	ea	1875.00	1875.00	1,875.00
On DEN				1	LINN	TRAMPOLIN	ea	245.00	245.00	245.00
On DEN				1	LINN	5101 PERSONAL	ea	390.00	390.00	390.00



"GOTO PRODUCTS/LOCK"	
✦	Set Error Capture [On]
✦	Set Field ["NEWNUM", "NEWNUM2"]
■	Set Field ["zx.zoneArea", "ZONE2 AREA DISPLAY 2"]
✦	If ["CHANGE ORDER LOCK = 1"]
✦	Beep
✦	Show Message ["This Proposal is SOLD. All changes, except Project Tracking and Product Status"]
✦	Exit Script
✦	End If
✦	Enter Find Mode []
✦	Set Field ["NEWNUM2", "NEWNUM2g"]
✦	Set Field ["PHASE FIND", ""P"]
✦	Set Field ["SAP FIND", ""P"]
■	If ["Status( CurrentLayoutName) = "ITEM/DETAIL.1"]
■	Set Field ["ZONE2 AREA DISPLAY 2", "zx.zoneArea"]
■	End If
✦	Perform Find [Replace Found Set]
✦	If ["Status( CurrentFoundCount) > 0"]
■	If ["Status( CurrentLayoutName) = "ITEM/DETAIL.1"]
■	Go to Layout ["LIST/PRODUCT LINE"]
■	Else
✦	Go to Layout ["LIST/PRODUCT LINE"]
✦	Perform Script [Sub-scripts, "Find Phase-P"]
✦	End If
✦	Perform Script [Sub-scripts, "Optimize Windows & Hide Status"]

### Enhancement – POS: Sales Invoice and Purchase Order Duplication

You can now Duplicate a Sales Invoice and a Purchase Order the same way that you can Duplicate a Quotation.

Print/Prev 1 2 3		Invoice		Costing		Done	
Cost:	Packing List:	SI #1055		Set Up			
Vendor:		Address 2:		11/17/2012			
Capitol Sales Company 3110 Neil Armstrong Blvd. Egan, MN 55121		Work: 800-467-8255 Fax: 800-440-4077		Capitol Sales Company			
Reference Description: der							
Ship VIA	Payment	Terms	Your #	Proposal #	Sales Rep		
		Quotation prices good for 30					
Pick	QTY unit	PRODUCT DESCRIPTION		Install min. sec	PRICE	TOTAL	T
	1 ea	LINN: 5101 PERSONAL HANDSET : XXXX: ACCESSORIES: UNIVERSAL			390.00	390.00	

**Print/Prev 1 2 3** **Purchase Order** **Done**  
**Print Store Copy** **Duplicate Purchase Order** PO #1056 **Set Up**

**VENDOR:** 11/17/2012 **Ship To:** SHOP WAREHOUSE  
 Capitol Sales Company Work: 800-467-8255  
 3110 Neil Armstrong Blvd.  
 Egan, MN 55121 Fax: 800-440-4077  
 EME Audio & Video Systems  
 414 W Ridgemont  
 Strum, WI 54770

Reference Description:

Need By	Reference #	Ship VIA	Invoice #	Terms	Buyer
				Standard Terms	Jim Engandela

Pick	QTY	unit	PRODUCT DESCRIPTION	PRICE	TOTAL
	3	ea	ADVENT - AW820 - SPKR WRLS10WT 900MHZ 4 WOOFER	135.00	405.00

Enhancement – POS: Invoice Packing List: Multiple Delivered columns and date  
 The POS Invoice Packing List screen and printout now have 4 columns for tracking Delivered Quantities. Each column has a Date field at the top and they all add up to the B/O Qty column.

**Print/Prev 1 2 3** **Invoice** **Costing** **Done**  
**Cost:** **Packing List:** **Set Up** SI #1042 **6/14/1999**

**Address 1:** Rocky Buldo A V I D Work: 404-871-5990  
 P.O. Box 768802  
 Roswell, GA 30076 Fax: 770-752-9025  
**Address 2:** Rocky Buldo A V I D

Reference Description: xxxxxx

Ship VIA	Payment	Terms	Your #	Proposal #	Sales Rep
Customer	Payment On Delivery				David Welch

Pick	QTY	unit	PRODUCT DESCRIPTION	Install min sec	PRICE	TOTAL	Tax	Date Qty	Date Qty	Date Qty	Date Qty	B/O Qty
	1	ea	ADVENT - AW810 - SPKR WIRELESS OUTDOOR WATER RESISTANT		129.99	129.99	T	12/30/12				1
	3	ea	AIWA - CADW635 - PORT STEREO 3PC 10W DIGITAL RC Q-SUR		139.95	419.85	T	1				2
	4	ea	AIWA - TSW60 - SUBWOOFER 120W AMPLIFIER 8		200.00	800.00	T	1	1	1	1	0
	3	ea	LINN - AV 5110 LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER -		325.00	975.00	T	3				0

EME Audio & Video Systems  
 S15700 Hwy U  
 Strum, WI 54770  
 Ph: (715) 287-3335 Fax: (715) 287-4464

**EME audio & video**

**PACKING LIST**  
 SI #1042  
 6/14/1999  
 Permit: 1234

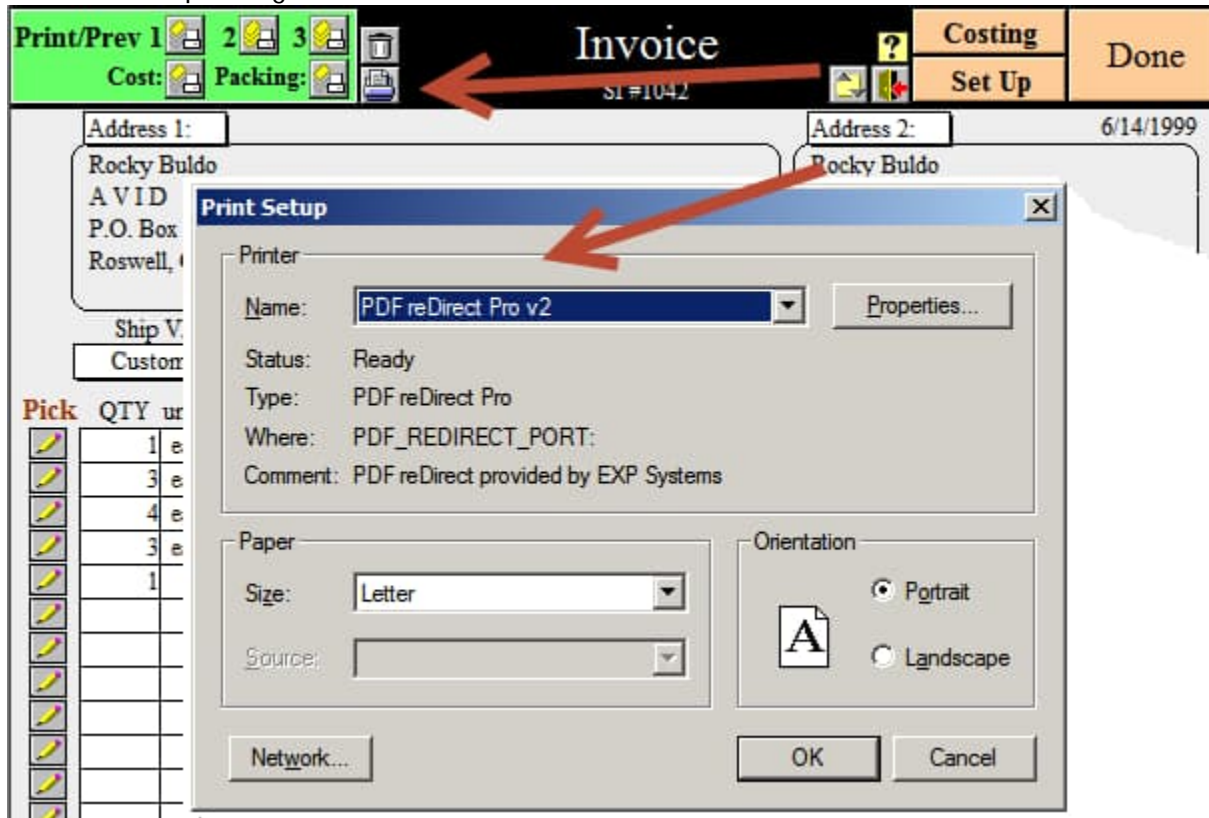
**Address 1:** Rocky Buldo A V I D Work: 404-871-5990  
 P.O. Box 768802  
 Roswell, GA 30076 Fax: 770-752-9025  
**Address 2:** Rocky Buldo A V I D

Ship VIA	Payment	Terms	Your #	Our #	Sales Rep
Customer Pickup	Payment On Delivery				David Welch

Delivered Dates & Qty	B/O Qty	QTY SOLD	PRODUCT DESCRIPTION
12/30/12		1	ADVENT - AW810 - SPKR WIRELESS OUTDOOR WATER RESISTANT
1	2	3	AIWA - CADW635 - PORT STEREO 3PC 10W DIGITAL RC Q-SUR
1	4	4	AIWA - TSW60 - SUBWOOFER 120W AMPLIFIER 8
3	0	3	LINN - AV 5110 LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER - BLACK/WHITE
	5	5	AIWA - HSTA193 - PERS STEREO ANALOG SUPER BASS 22HR

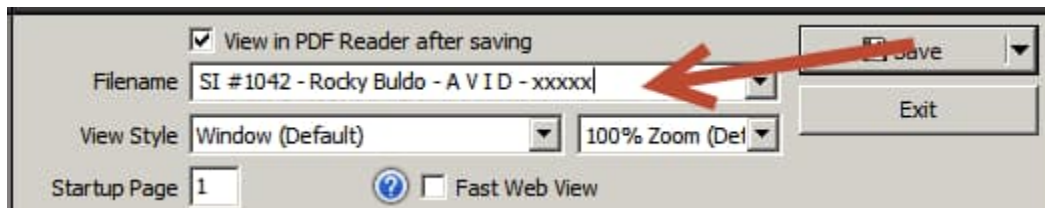
Enhancement – POS: Printer Setup button

A new printer setup button has been added to all POS screens so that you can change our printer to a PDF driver before printing.



Enhancement – POS: Paste Invoice Info into PDF Filename

When PDF'ing all POS Invoices, you can put your cursor into the Filename field and press control & v on your keyboard to auto enter the Invoice Number – Client Name – Company Name – Reference Description into the field. You can tweak it from there.



Enhancement – POS: Sales Invoice/Packing List Delivered and BackOrder fields

The POS Invoice/Packing List now has a Delivered Qty field and a calculated Back Order qty on screen and on the printed Packing Order. The printed Packing Order also now has delivered and received printed name and signature lines at the bottom.



**Print/Prev 1 2 3** **Costing** **Done**  
**Cost:** **Packing List:** **Set Up**

**Invoice**  
SI 1042

Address 1: Rocky Buldo  
A V I D  
P.O. Box 768802  
Roswell, GA 30076  
Work: 404-871-5990  
Fax: 770-752-9025

Address 2: Rocky Buldo  
A V I D  
6/14/1999

Ship VIA Payment Terms Your # Proposal # Sales Rep  
Customer Payment On Delivery David Welch

**Packing List**  
Delivered BackOrder

Pick	QTY	unit	PRODUCT DESCRIPTION	Install min sec	PRICE	TOTAL	Tax	Qty	Qty
1	ea	ADVENT - AW810 - SPKR WIRELESS OUTDOOR WATER RESISTANT		129.99	129.99	T	1	0	
3	ea	AIWA - CADW635 - PORT STEREO 3PC 10W DIGITAL RC Q-SUR		139.95	419.85	T	1	2	
4	ea	AIWA - TSW60 - SUBWOOFER 120W AMPLIFIER 8		200.00	800.00	T	4	0	
3	ea	LINN - AV 5110 LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER -		325.00	975.00	T	3	0	

EME Audio & Video Systems  
S15700 Hwy U  
Strum, WI 54770  
Ph: (715) 287-3335 Fax: (715) 287-4464

**EME**  
audio & video

**PACKING LIST**  
SI #1042  
6/14/1999  
Permit: 1234

Address 1: Rocky Buldo  
A V I D  
P.O. Box 768802  
Roswell, GA 30076  
Work: 404-871-5990  
Fax: 770-752-9025

Address 2: Rocky Buldo  
A V I D

Ship VIA Payment Terms Your # Our # Sales Rep  
Customer Pickup Payment On Delivery David Welch

Delivered BackOrder QTY SOLD PRODUCT DESCRIPTION

1	0	1 ea	ADVENT - AW810 - SPKR WIRELESS OUTDOOR WATER RESISTANT
1	2	3 ea	AIWA - CADW635 - PORT STEREO 3PC 10W DIGITAL RC Q-SUR
4	0	4 ea	AIWA - TSW60 - SUBWOOFER 120W AMPLIFIER 8
3	0	3 ea	LINN - AV 5110 LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER - BLACK/WHITE

Delivered By: \_\_\_\_\_ Date: \_\_\_\_\_

Received By: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name Signature

Enhancement – POS: All POS: Reference Description field

A new Reference Description field has been added to all POS Invoice screens and List screens. If you click on the Reference field on the List screens it will expand to show all of the text.

**Purchase Order** PO #1047

Print/Prev 1 2 3 Print Store Copy

Set Up Done

VENDOR: 1/9/2001 Ship To: SHOP WAREHOUSE

Capitol Sales Company Work: 800-467-8255  
3110 Neil Armstrong Blvd.  
Egan, MN 55121 Fax: 800-440-4077

EME Audio & Video Systems  
414 W Ridgmont  
Strum, WI 54770

Reference Description: This is a new shop reference field

Need By Reference # Ship VIA Invoice # Terms Buyer

Standard Terms Jim Engandela

Pick	QTY	unit	PRODUCT DESCRIPTION	PRICE	TOTAL
1	ea		LINN-AV5103-SYSTEMCONTROLLER WITHOUT RF DEMODULATOR	4650.00	4650.00

Find P.O. All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Print List ? PURCHASE ORDERS click on purchase order to view Done

#	Invoice	Company	Reference	Date	Buyer	P.O. Status	P.O. Amount
PO #1043	A& R Alarm			7/19/1999	Jim	Open	\$114.10
PO #1045	Capitol Sales Company			4/12/2000	Jim	Closed	\$405.00
PO #1047	Capitol Sales Company		This is a new shop reference field	1/9/2001	Jim	Closed	\$4,650.00

Enhancement – POS: All POS: Return to All Invoices or All for the Client/Vendor

When you leave any POS Invoice screen and return to the List screens you now have the option to view All Invoices or All Invoices for only the Client/Vendor you were looking at.

Find Quote All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Print List ? QUOTATIONS click on quotation to view Done

#	Invoice	Client	Company	Reference	Date	Amount
QT #1054	Jim Engandela	Horizon Software			11/5/2012	
QT #1053	Jim Engandela	Horizon Software			11/5/2012	
QT #1052		Capitol Sales Company	11		11/5/2012	\$401.69

**Message**

Show all Clients/Vendors or all for This Client/Vendor?

This All

Enhancement – POS: Find Sales Invoice Option to sort by Invoice Number or Date

When you leave the Find Invoices screen you are given the option to Sort the List screen by Invoice Number or Date.

Find Sales Invoice All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Print List** ? **SALES INVOICES** Done

click on sales invoice to view

#	Invoice	Client	Company	Reference	Date	Amount	Due
SI #1042	Rocky Buldo	AVID	XXXXX	6/14/1999	\$2,596.84	\$2,596.84	
SI #1052		Capitol Sales Company	der	4/8/2011	\$401.69	\$401.69	

**Message**

PDS Invoices Sort by Invoice Number.  
Do you want to Sort by Date instead?

Date Invoice #

### Enhancement – Product Library/Utility: Import CPS Excel Product Worksheet

A new Excel Product Worksheet has been created and is stored in the CPS folder. It can be populated with your products and then imported into the CPS Product Library from the Product Library/Utility screen. Please do not change or delete the field header names in the Excel worksheet or the import will not work properly.

**Import SCPS Products**

This utility will import products from the SmartPartner Product Library into the CPS Product Library.

**Import CPS Excel Product Worksheet**

This Utility will import the cps.Excel Product Worksheet into the CPS Product Library. Populate this worksheet with your products and then close it and click on the button. Do not change, move or delete the Header Title in the worksheet or it will not work properly. The import is set to Merge data if the product exists in CPS or Add if it doesn't. Merge is based on Make-Model-Finish.

Name	Date modified	Type	Size
_CPS Help Guides	4/6/2012 4:52 PM	File folder	
CPS 5.0 Plugin's	4/6/2012 4:52 PM	File folder	
_cps.Excel_Product_Worksheet_7.9v32.xls	11/8/2012 5:56 AM	Microsoft Excel 97-...	28 KB
_cps.Open.fp5	11/8/2012 5:42 AM	FileMaker Pro Datab...	16 KB

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center, Left, Center, Right, Justify, Indent, Decrease Indent, Increase Indent

Number: General, Currency, Percentage, Decimals, Fractions, Scientific, Text, Custom

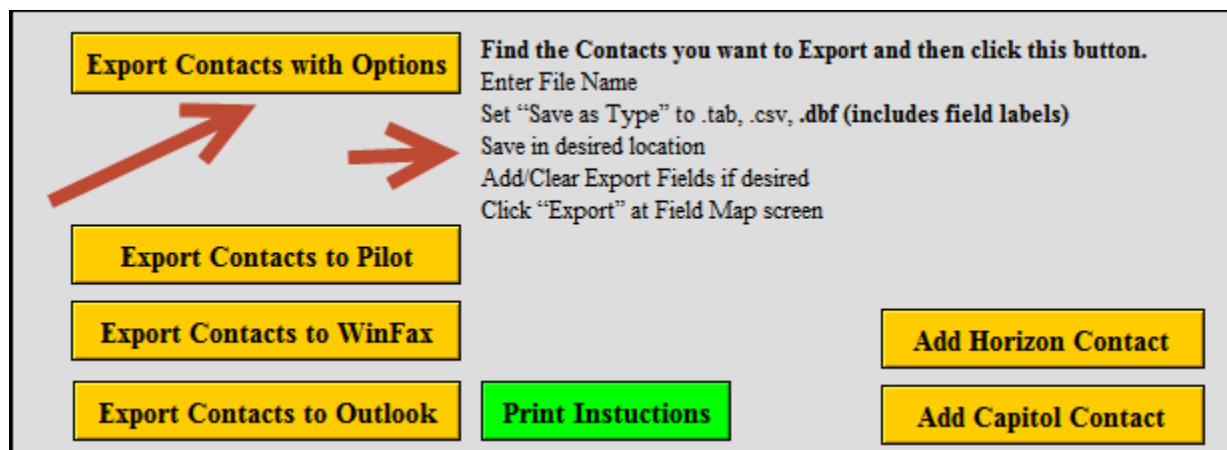
Styles: Conditional Formatting, Format as Table, Styles

MAKE	MODEL	SKU NUMBER	DEPARTMENT	CATEGORY	DESCRIPTION	PRODUCT TEXT



Enhancement – Contacts/Utility: Export all Primary Contact Fields with options

You can now export all of the Primary Contact fields with options to format the exported file in .dbf, .csv, .tab format for importing into excel or other programs.

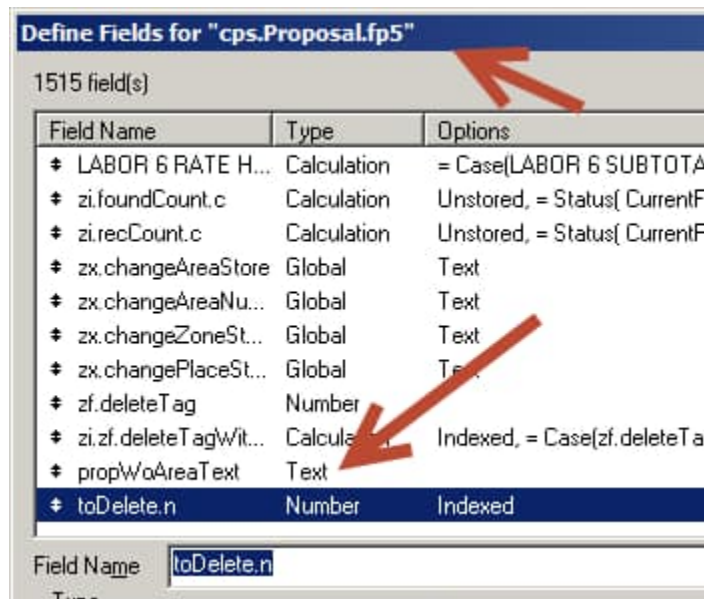


Enhancement – Delete Multiple Proposals and Projects

You can now check off multiple Proposals and Projects and delete them all at one time.

Add new Proposal field

toDelete.n



Download file:

[www.horizon-software.com/download/cpsDeleteAll.zip](http://www.horizon-software.com/download/cpsDeleteAll.zip)

Import Import Delete script from this file

util.deleteAllProposals

Copy Sold field and attach to field toDelete.n

Switch value list to -Booleen

Add a Delete All button and attach to the util.deleteAllProposals script



Pick Text	Add to Text Library Clear Area Text	Change Area Name Capitol Sales Company	Spell Check Text Ruler	Done
-----------	--	---	---------------------------	------


ZONE:  AREA:  Placement:

Text ID

This area includes the following products and features:

Work Order Area Text

This area text will appear on the Installation Work Orders.



Enhancement – Proposals: Increase Area Zone numbers from 50 to 98  
Increase Proposal Area Zone numbers from 50 to 98.

Pick Text	Add to Text Library Clear Area Text	Change Area Name Capitol Sales Company	Spell Check Text Ruler	Done
-----------	--	---	---------------------------	------

ZONE:  AREA:  Placement:

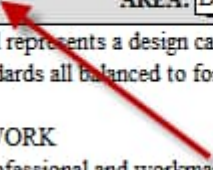
Text ID

This proposal represents a design carefully prepared with your requirements, our experience and industry standards all balanced to form a workable plan.

SCOPE OF WORK

Keep text within field

Install in a professional and workmanlike manner all components included in this proposal including, as necessary, required cable, parts and materials to complete the installation as described in this proposal.



Version 7.9v32

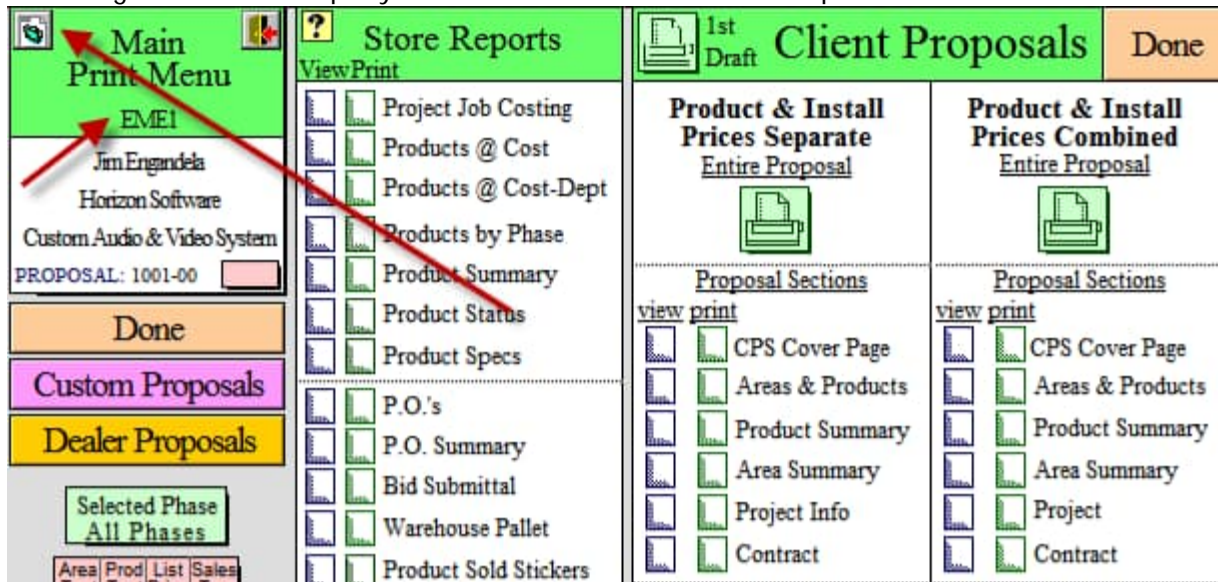
Enhancement – Add “Show Print Dialog” to all POS/Invoice/Setup screens.  
Mac Users can now select the Show Print Dialog box in the POS module when printing to pop up the Print Dialog window when printing so that they may select PDF driver to create a PDF from all POS Invoices.

Version 7.9v31

Fix – Multi-Company Option: Change Company from Proposal Print Menu



Switching Companies from the Proposal Print Menus now properly changes the Proposal Cover Page Text, Extra Page Text and Company Address information on that Proposal.



Version 7.9v30

Enhancement – Add Tax Adjustment field to POS Invoices

You can now manually adjust the Tax amount on POS Quotes and Invoices.

Notes:

Total Install Hours 0.00    Equipment GP% 40.0%    **Update Total Prices >**

PAYMENTS & DESCRIPTION:		Zero Install Charge
(Used for Sales Invoices only)		

Adjust Tax:

**SUB TOTAL:** 390.00  
**INSTALL:** 0.00   
**TAX:** 11.69  
**FREIGHT:**   
**TOTAL:** 401.69

**- TOTAL PAYMENTS:**   
**REMAINING BALANCE:** 401.69

Version 7.9v29

Enhancement – Project and Area Rename screen trap

When leaving the Project Info and Proposal Rename Areas screens a database trap has been added to ensure that changes occur only in that specific proposal.

Version 7.9v28

Enhancement – Proposal and Product Library Pictures: Reformat Pix fields

Reformat all Pix fields to accommodate larger images so that they preview and print properly.

Version 7.9v27

Enhancement – POS/Purchase Orders: Done Button shows All or This Vendor

When you click on the Done button in a POS Purchase Order you now can choose between showing all of the POS PO's or only PO's from the Vendor you are currently on.

**Purchase Order** PO #1045

Print/Prev 1 2 3 Print Store Copy

VENDOR: Capitol Sales Company  
3110 Neil Armstrong Blvd.  
Egan, MN 55121

4/12/2000 Ship To: SHOP WAREHOUSE

Need By Reference # Ship VI

**Message**  
Show All Vendors or only This Vendor.  
This All

Pick QTY unit PRODUCT DESCRIPTION PRICE TOTAL

Set Up Done

Version 7.9v26

Enhancement – Project Work Orders: Create Work Request from Work Order  
You can now create a POS Work Request from a Project Work Order and return to the Work Order.

Times New Roman 12 A<sup>+</sup> A<sup>-</sup> B I U

**Work Order Detail**

Preview Work Order Print and Post Modify Work Order Done

First Name Jim Last Name Engandela Address S. 15700 Hwy U. City Strum State Zip WI 54770

**Create POS Work Request** WR #1069

Invoice 200609 Proposal 100300 Invoice Date 12/6/2010 Posted Date

Other WO Labor Hours

Appointment Day Actual Start Date Reschedule ☐ Appointment Date Actual Start Time Shop Dept Appointment Time Actual Stop Time Installer Actual Stop Date WO written by

Instructions

Zone - Area	Qty	Make	Model	Description
DEN	1 pr	LINN	KEILIDH AKTIV	CHERRY/ROSENUIT (INC.)

<b>Print/Prev 1</b> <b>2</b> <b>3</b>		<h2 style="margin: 0;">Work Request</h2> <p style="margin: 0;">WR #1069</p>		<b>Set Up</b>	<b>Done</b>
<div style="border: 1px solid black; padding: 5px; min-height: 50px;">             Jim Engandela              S. 15700 Hwy U.              Strum, WI 54770               Work: 715-287-3335               Fax: 715-287-4464           </div>		<div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p style="text-align: right; margin-top: 5px;">12/6/2010</p>			
<div style="display: flex; justify-content: space-between;"> <span>➔ Project # <input type="text" value="100300"/></span> <span>Project Work Order # <input type="text" value="200609"/></span> <span style="background-color: #FFD700; padding: 2px 5px;">Proj WO</span> </div>					
<div style="display: flex;"> <div style="width: 15%;">Work Requested</div> <div style="border: 1px solid black; flex-grow: 1; min-height: 40px;"></div> </div>					
<div style="display: flex; justify-content: space-between;"> <div>             Appt Date <input type="text"/>              Time <input type="text"/>              Installers Notes <div style="border: 1px solid black; height: 40px; width: 100%;"></div> </div> <div>             Hours Quoted <input type="text"/> COD <input type="text"/>              Confirmed day prior <input type="checkbox"/> Hourly <input type="checkbox"/> Piece <input type="checkbox"/> </div> </div>					
<div style="display: flex;"> <div style="width: 15%;">Equipment Needed</div> <div style="border: 1px solid black; flex-grow: 1; min-height: 40px;"></div> </div>					
<div style="display: flex; justify-content: space-between;"> <div>             Start Time <input type="text"/> Lunch Start <input type="text"/> End <input type="text"/>              Installer <input type="text"/> </div> <div>             Finish <input type="text"/> Total <input type="text"/> Rate <input type="text"/> Amt <input type="text"/>              Work Completed <input checked="" type="radio"/> Yes <input type="radio"/> No Hrs to Complete <input type="text"/> </div> </div>					

Version 7.9v25

### Enhancement – Project Work Orders: Other Hours

Additional Labor hours can be added to Project Work Orders and these are shown with a total that includes the Product Install labor hours.

<b>Preview Work Order</b>	<b>Print and Post</b>	<h2 style="margin: 0;">Work Order Detail</h2>		<b>Modify Work Order</b>	<b>Done</b>
<div style="display: flex;"> <div style="width: 50%;"> <b>First Name</b> Jim  <b>Last Name</b> Engandela  <b>Address</b> S. 15700 Hwy U.  <b>City</b> Strum  <b>State Zip</b> WI 54770           </div> <div style="width: 50%; text-align: right;"> <b>Invoice</b> 200607  <b>Proposal</b> 100300  <b>Invoice Date</b> 11/22/2010  <b>Posted Date</b>  <b>Other WO Labor Hours</b> <input type="text" value="7.00"/> </div> </div>					
<b>Appointment Day</b> <input type="text"/> <b>Appointment Date</b> <input type="text"/> <b>Appointment Time</b> <input type="text"/>		<b>Actual Start Date</b> <input type="text"/> <b>Actual Start Time</b> <input type="text"/> <b>Actual Stop Time</b> <input type="text"/> <b>Actual Stop Date</b> <input type="text"/>		<b>Reschedule</b> <input type="checkbox"/> <b>Shop Dept</b> <input type="text"/> <b>Installer</b> <input type="text"/> <b>WO written by</b> <input type="text"/>	
<b>Instructions</b> <div style="border: 1px solid black; height: 40px; width: 100%;"></div>					



1003-00 <b>Project Number</b> 11/22/10	<h2 style="margin: 0;">INSTALL WORK ORDER</h2> <p style="margin: 0;"><b>EME Audio &amp; Video Systems</b></p>	200607 <b>Invoice Number</b> Page: 1			
<b>Client: Jim Engandela</b>					
<b>Company: Horizon Software</b>					
<b>Project: Custom Audio &amp; Video System</b>					
<b>Vendor: S. 15700 Hwy U. Strum, WI 54770</b>					
<b>Warren Petryk - Audio &amp; Video Specialist - Project Mgr</b>					
<table style="width: 100%; border: none;"> <tr> <td style="width: 40%; border: none;">           Plate Style: Color: Grill Type:         </td> <td style="width: 30%; border: none;"> <b>Phase: <u>All Phases</u></b>            1 - Prewirex Phase            2 - Trim Phase            3 - Finish Phase            4 - Training Phase            5 - Follow-Up Phase         </td> <td style="width: 30%; border: none;"> <b>Start    Finish</b>            7-1-07            8-1-07            9-1-07            10-1-07            11-1-07         </td> </tr> </table>			Plate Style: Color: Grill Type:	<b>Phase: <u>All Phases</u></b> 1 - Prewirex Phase 2 - Trim Phase 3 - Finish Phase 4 - Training Phase 5 - Follow-Up Phase	<b>Start    Finish</b> 7-1-07 8-1-07 9-1-07 10-1-07 11-1-07
Plate Style: Color: Grill Type:	<b>Phase: <u>All Phases</u></b> 1 - Prewirex Phase 2 - Trim Phase 3 - Finish Phase 4 - Training Phase 5 - Follow-Up Phase	<b>Start    Finish</b> 7-1-07 8-1-07 9-1-07 10-1-07 11-1-07			
<table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;">           Home Phone: Work Phone: 715-287-3335  Cell Phone: Fax: 715-287-4484         </td> <td style="width: 33%; border: none;">           Credit Approval: _____            Pager: E-mail:         </td> <td style="width: 33%; border: none;">           Product Labor: 4.00    Warranty: NO            Other Hours: 7.00    Charge: \$0            WO Total: 11.00    Pickup: NO                                             Charge: \$0         </td> </tr> </table>			Home Phone: Work Phone: 715-287-3335  Cell Phone: Fax: 715-287-4484	Credit Approval: _____ Pager: E-mail:	Product Labor: 4.00    Warranty: NO Other Hours: 7.00    Charge: \$0 WO Total: 11.00    Pickup: NO Charge: \$0
Home Phone: Work Phone: 715-287-3335  Cell Phone: Fax: 715-287-4484	Credit Approval: _____ Pager: E-mail:	Product Labor: 4.00    Warranty: NO Other Hours: 7.00    Charge: \$0 WO Total: 11.00    Pickup: NO Charge: \$0			
<table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;">           Appoint Day <input type="text"/>            Appoint Date <input type="text"/>            Appoint Time <input type="text"/>  <b>Instructions</b> </td> <td style="width: 33%; border: none;">           Actual Start Date <input type="text"/>            Actual Start Time <input type="text"/>            Actual Stop Date <input type="text"/>            Actual Stop Time <input type="text"/> </td> <td style="width: 33%; border: none;">           Reschedule <input type="checkbox"/>            Shop Dept <input type="text"/>            Installer <input type="text"/>            WO written by <input type="text"/> </td> </tr> </table>			Appoint Day <input type="text"/> Appoint Date <input type="text"/> Appoint Time <input type="text"/> <b>Instructions</b>	Actual Start Date <input type="text"/> Actual Start Time <input type="text"/> Actual Stop Date <input type="text"/> Actual Stop Time <input type="text"/>	Reschedule <input type="checkbox"/> Shop Dept <input type="text"/> Installer <input type="text"/> WO written by <input type="text"/>
Appoint Day <input type="text"/> Appoint Date <input type="text"/> Appoint Time <input type="text"/> <b>Instructions</b>	Actual Start Date <input type="text"/> Actual Start Time <input type="text"/> Actual Stop Date <input type="text"/> Actual Stop Time <input type="text"/>	Reschedule <input type="checkbox"/> Shop Dept <input type="text"/> Installer <input type="text"/> WO written by <input type="text"/>			

Enhancement – POS/Work Requested Form

A new POS form has been added that enables you to issue and keep track of Work Requested instances.

<b>POS Utility</b>	<b>Print POS Invoice List</b>	<h1 style="margin: 0;">Point of Sale</h1>	<b>Done</b>									
<h2 style="margin: 0;">Create a new POS Invoice</h2> <div style="margin: 10px auto; width: 200px; height: 40px; background-color: #FFD700; text-align: center; line-height: 40px;">       Create a New POS Invoice     </div>												
<h2 style="margin: 0;">View Existing POS Invoices</h2> <table style="width: 100%; margin-top: 20px;"> <tr> <td style="width: 33%; text-align: center;"> <b>QUOTATIONS</b>  </td> <td style="width: 33%; text-align: center;"> <b>WORK ORDERS</b>  </td> <td style="width: 33%; text-align: center;"> <b>CHANGE ORDERS</b>  </td> </tr> <tr> <td style="text-align: center;"> <b>SALES INVOICES</b>  </td> <td style="text-align: center;"> <b>SERVICE ORDERS</b>  </td> <td style="text-align: center;"> <b>PURCHASE ORDERS</b>  </td> </tr> <tr> <td style="text-align: center;"> <b>ACCEPTANCE FORM</b>  </td> <td style="text-align: center;"> <b>WORK REQUEST</b>  </td> <td style="text-align: center;"> </td> </tr> </table>				<b>QUOTATIONS</b> 	<b>WORK ORDERS</b> 	<b>CHANGE ORDERS</b> 	<b>SALES INVOICES</b> 	<b>SERVICE ORDERS</b> 	<b>PURCHASE ORDERS</b> 	<b>ACCEPTANCE FORM</b> 	<b>WORK REQUEST</b> 	
<b>QUOTATIONS</b> 	<b>WORK ORDERS</b> 	<b>CHANGE ORDERS</b> 										
<b>SALES INVOICES</b> 	<b>SERVICE ORDERS</b> 	<b>PURCHASE ORDERS</b> 										
<b>ACCEPTANCE FORM</b> 	<b>WORK REQUEST</b> 											

EME Audio & Video Systems  
S15700 Hwy U  
Strum, WI 54770  
Ph:(715) 287-3335 Fax:(715) 287-4464



**WORK REQUEST**  
WR #1052  
11/10/2010  
Permit: 1234

Vendor:

Jim Engandela  
Horizon Software  
S. 15700 Hwy U.  
Strum, WI 54770

Work: 715-287-3335

Fax: 715-287-4464

Address 2:

Jim Engandela  
Horizon Software

Work Requested					
		Hours Quoted			
Appt Date		Time		Confirmed day prior <input type="checkbox"/> Hourly <input type="checkbox"/> Place <input type="checkbox"/>	
Installers Notes					
Additional Equipment Needed					
Work Completed <input type="checkbox"/> Yes <input type="checkbox"/> No		Hours Needed to Complete <input type="text"/> Hours			
Start Time	<input type="text"/>	Finish Time	<input type="text"/>	Rate <input type="text"/> Total \$ <input type="text"/> Installer <input type="text"/>	

Version 7.9v24

Enhancement – Proposal/Print Menu: Technical Services Summary  
Labor summary now includes any/all additional Labor such as Prep or Travel time.

### TECHNICAL SERVICES

Technical Services	Hours	Rate	Total
EQUIPMENT INSTALLATION	42.0	70	\$2,940.00
INSTALLATION	10.0	33	\$330.00
PREP & TRAVEL TIME	8.0	33	\$264.00
Total:			\$3,534.00

## Enhancement – Product Library/Utility: Capitol Sales Product Import

You can now download the latest Capitol Sales catalog and product prices. First download the file from the Horizon Server using button #1 and then import the file into SCPS using button #2. Your product prices will be updated if they already exist in your SCPS library and new items will be automatically added.

Please contact other distributors you work with and encourage them to contact Horizon at [horizon@triwest.net](mailto:horizon@triwest.net) to have their products included in your software.

<b>Download CapitolSales_Items_1</b>	1. First download the Capitol Sales_Items_1 file from the Horizon server and save it onto your computer. Do not save it in your CPS folder, but remember where you save it.
<b>Import CapitolSales_Items_1</b>	2. Open the CapitolSales_Items_1 file that you downloaded onto your computer. Items that exist in your CPS database will be updated with the current Capitol prices and new items will be added to your CPS products.

Version 7.9v23

## Enhancement – Project/Tyler Export:

Add Salesman's Number and Store name to the export data and force Caps.

Version 7.9v22

## Enhancement – Project/Tyler Export: File name

The File name that the Tyler data export file creates now contains the Proposal/Project number. (T1099.01-100)

The screenshot shows the 'Tyler Export' script editor with a list of script steps. Red arrows point to specific steps: 'Copy [Select, "TylerPropNum"]', 'Show Message ["When you are prompted to Save this exported data. 1. Press Control & V on your keyboard to paste the Proposal Number into the File Name. 2. Set the Save as Ty', and 'Export Records [Restore, No dialog]'. A 'Specify Message' dialog box is overlaid on the right, showing the message text and button captions.

**"Tyler Export"**

- Go to Record/Request/Page [First]
- Copy [Select, "TylerPropNum"]
- Show Message ["When you are prompted to Save this exported data. 1. Press Control & V on your keyboard to paste the Proposal Number into the File Name. 2. Set the Save as Ty
- Set Field ["zx.tyler1.t", "CURRENT ADDRESS"]
- Set Field ["zx.tyler2.t", "CURRENT CITY"]
- Set Field ["zx.tyler3.t", "CURRENT STATE"]
- Set Field ["zx.tyler4.t", "CURRENT ZIP"]
- Set Field ["zx.tyler5.t", "SPECIALIST"]
- Set Field ["zx.tyler6.t", "CLNT HOME WORK Ph.c"]
- Go to Record/Request/Page [Next]
- Loop
  - Set Field ["CURRENT ADDRESS", "zx.tyler1.t"]
  - Set Field ["CURRENT CITY", "zx.tyler2.t"]
  - Set Field ["CURRENT STATE", "zx.tyler3.t"]
  - Set Field ["CURRENT ZIP", "zx.tyler4.t"]
  - Set Field ["SPECIALIST", "zx.tyler5.t"]
  - Set Field ["CLNT HOME PHONE", "zx.tyler6.t"]
- Go to Record/Request/Page [Exit after last, Next]
- End Loop
- Go to Record/Request/Page [First]
- Perform Script [Sub-scripts, "SHOW PRODUCTS ONLY"]
- Export Records [Restore, No dialog]

**Specify Message**

Message Text:

When you are prompted to Save this exported data.

1. Press Control & V on your keyboard to paste the Proposal Number into the File Name.

2. Set the Save as Type to: Tab Separated Text.

3. Set the Save In to the folder you want to save this file into.

Button Captions:

First (default): OK

Second:

Third:

OK Cancel

## Enhancement – Project/Tyler Export: Store and Salesman's numbers

You now can enter a Store number and a Salesman's number into CPS and these will appear in the Tyler data export. You will be notified if you try to use the Tyler export and these files are empty.



Install Details	Related Contacts	36	Proposal Project Details		Add Client to Contacts	Done
Please use normal case text						
CLIENT:	Salutation	First Name	Last Name	Pick Contact	Proposal: 100300	
		Jim	Engandela		Created: 3-2-05	
	COMPANY:	Horizon Software			Modified: 9-24-09	
VENDOR:	ADDRESS:	S. 15700 Hwy U.			HOME PHONE:	
	CITY:	Strum			WORK: 715-287-3335	
	ST:	WI			MOBILE:	
	COUNTRY:	ZIP: 54770			PAGER:	
ADDRESS:	ADDRESS:				FAX: 715-287-4464	
	CITY:				E-MAIL:	
	ST:	ZIP:			REFERRED BY:	
	COUNTRY:					
PROJECT DESCRPT:		Custom Audio & Video System		PROJECT MGR:		
SALESMAN:		Warren Petryk		BID NUMBER:		
TITLE:		Audio & Video Specialist		STORE #	01	SALESMANS # 03

Version 7.9v21

Fix – Proposal Misc Parts charge when adding products

Adding Products to a Proposal was not adding the misc parts charge because the Misc Parts flag was not getting stamped on the product record. This has been corrected. You can go into your Proposal/Setup screen on existing proposals and click on the Misc Parts flag and then click on Done to update each existing proposal.

Version 7.9v20

Enhancement – Proposal Warehouse Pallet: Add Product Cost

Add the Product cost to the Warehouse Pallet.

Capitol Sales Company		<b>Warehouse Pallet List</b>		7/15/09 Page: 1		
3110 Neil Armstrong Blvd.				Proposal: 1001-10		
Egan, MN 55121				Project Mgr:		
<b>EME Audio &amp; Video Systems</b>						
<u>Proposal Phases Presented:</u>		<u>All Phases</u>				
1 - Prewire Phase		12-1-05				
Qty	Product Description	Unit Cost	Phase	Wire	X Complete	Serial #
2	LINN - ARKIV - ACCESS CONTROL KEYPADS - MOVING-COIL CARTRIDGE	\$1,500.00	0	1 Good		
2	LINN - EKOS - TONEARM BLACK	\$1,617.00	0	1 Good		
2	LINN - IKEMI - COMPACT DISC PLAYER - REMOTE CONTROL CD PLAYER BLACK	\$2,157.00	0	1 Good		
8	LINN - K600 CABLE - ACCESSORIES - TRI-WIRE SPEAKER CABLE/METRE	\$20.40	0	1 Good		
2	LINN - KEILIDH AKTIV (3-WAY) -	\$1,212.00	0	1 Good		

Fix – Proposal Duplication: Version Number Duplication

In some cases Duplicating Proposal or Projects with a new version number was creating a new Proposal number along with the new version number. This has been corrected.

Version 7.9v19

Enhancement – Product Library: Find Products with or without Labor

From any Product Library screen you can click on the Find Products button and then click on the Find All Products with or without Labor assigned to them. You can then click on the Print Menu button and print any report of just these products.

Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z					
Utilities	8912 of 8912																			Product Library										Detail List		Done	
Utility Views	Line List																			Vendors										Product Sets			
Inventory	click on View button for Details																			Add Product		Print Menu											
Make	Model					Pkg		Category		Description										Price		View Fav											
LINN	TUNE BOX									ACCESSORIES - TO HOUSE ACTIVE CARD -										100.00 ea													
LINN	5101 PERSONAL									ACCESSORIES - UNIVERSAL LEARNING R -										390.00 ea													

<b>Check One</b>		<b>Enter all of your desired Find criteria and then click Done</b>										<b>Find Products with or without Labor</b>		<b>Done</b>											
<input checked="" type="radio"/>	Understocked (-)																								
<input type="radio"/>	Overstocked (+)																								
<b>Make:</b>	LINN					<b>Department:</b>												<b>Created:</b>	10/21/1981						
<b>Model:</b>	TUNE BOX					<b>SKU#:</b>												<b>Modified:</b>	5/25/2000						

#### Enhancement – Setup/Taxes: New Tax Settings and Help Guide

You can click on the Help ? for an explanation of the Tax settings and options.

Parts are always taxed (if the Tax Parts flag is set to “Yes”) regardless if the Product Tax Flag setting on each item.

Hourly

Cost

Sell

List

Install Labor:

\$50

\$70

\$80

Misc Parts Charge:

5%

of Equip

of Labor

A

Tax Rates

B

1

7.45%

Installed

2

6.00%

Added.....

3.00%

3

0.00%

Compound

0.00%

YES

Tax Labor

YES

Tax Misc Parts

Tax 2 AB Override Option

Taxed items (T) =

Tax A on the Sell price and Tax B will be 0

Installed items (I) =

Tax A will be 0 and Tax B will be on the Cost

Message

CPS TAX GUIDE

TAX RATES

1. Single tax

2. Added tax

3. Compound tax

Tax A is the primary tax;

Tax B is an additional value tax. GST/PST

Tax A is the primary tax; Tax B is a tax on the primary (A) tax

All Parts and Labor are taxed at the selected 1A, 2A or 3A rates.

PRODUCT TAX FLAG

In the proposal, each product can be set to:

Taxed (T)

Exempt (E)

Installed (I)

If the Product Tax flag is set to I (Installed), then the tax 2B is based on the COST of the product instead of the selling price.

In this case, use the tax rate option 2 and then set individual products to "Installed" in the proposal.

This method can also provide Canadian users with GST-PST tax structures.

Tax A GST which taxes the product, plus Tax B PST which taxes it as a transient product (T) or as an installed product (I) at cost.

TAX LABOR

Can be set to Yes or No or to tax labor only at the Tax A or Tax B rates.

TAX MISC PARTS

(Set to Yes or No)

2 AB OVERRIDE OPTION

Taxed items (T) = Tax A on the Sell price and Tax B will be 0

Installed items (I) = Tax A will be 0 and Tax B will be on the Cost.

OK

Version 7.9v18

Enhancement – Proposal/Areas: Leaving Change Area retains Phase set

When using the Select Phase feature, leaving the Change Area Name and Modify Area Text screens now retains the selected Phase set.



Text Library	Change Area Name	Spell Check	Done
Area Text	Michael Mayall - dddd	Text Ruler	

0 AREA: BREAKROOM Placement: n

f this proposal there will be retro fit of wire through out the home which may require the drywall. Drywall pieces will be left or replaced in wall. The patch and paint of drywall holes premium Installations scope of work. The patch and paint of drywall holes will be the ers responsibility. Please contact your sales rep if you have any questions regarding the retro

**Script Debugger**

Perform Script [Sub-scripts, "Set area with unique area number"]  
 Replace Contents [No dialog, "FIND PROPOSAL AREA?", "Current contents"]  
 Replace Contents [No dialog, "AREA", "Current contents"]  
 Replace Contents [No dialog, "ZONE", "Current contents"]  
 Replace Contents [No dialog, "ZONE PLACEMENT", "Current contents"]  
 Set Field ["NEWNUM2g", "NEWNUM2"]  
 If ["0"]  
   Enter Find Mode []  
   Set Field ["NEWNUM2", "NEWNUM2g"]  
   Set Field ["SAP FIND", "A"]  
   Perform Find [Replace Found Set]  
 End If  
 Perform Script [Sub-scripts, "Find Phase-A"]  
 If ["CHANGEgNAV = 1"]  
   Set Field ["CHANGEgNAV", ""]  
   Perform Script [Sub-scripts, "CO-Goto Areas/Add Products"]  
 Else  
   Go to Layout ["LIST/AREAS"]  
   Perform Script [Sub-scripts, "SORT PROPOSAL-master"]  
   Perform Script [Sub-scripts, "Optimize Windows & Hide Status"]  
 End If

Active Scripts:  
**CHANGE AREA NAME/DONE ( cps.Proposal.fp5 )**

**"DONE MODIFY DESIGN TEXT"**

◆ If ["SYSTEMgDESIGN = 1"]  
 ◆ Clear [Select, "TEXT LOOKUP QUE"]  
 ◆ Perform Script [Sub-scripts, "GOTO 1PROPOSAL DETAIL SCREEN"]  
 ◆ Else  
 ◆ Clear [Select, "TEXT LOOKUP QUE"]  
 ◆ If ["0"]  
   ◆ Perform Script [Sub-scripts, "Find Prop-All-A"]  
 ◆ End If  
 ◆ Perform Script [Sub-scripts, "Find Phase-A"]  
 ◆ Go to Layout ["LIST/AREAS"]  
 ◆ Perform Script [Sub-scripts, "Optimize Windows & Hide Status"]  
 ◆ End If

## Enhancement – Proposal/Project: Leaving Project Updates Client Information

When leaving the Project screen CPS now updates all of the Project information on your proposal without risk of affecting other proposals.

Project

Areas

Products

Selected Phase

All Phases

Purchasing

Work Orders

Invoicing

Sold

Done

Products: \$1

HP: \$1

Proposal Detail

Michael Mavall

4444

Pricing

Set Up

Done

Change Orders

Script Debugger

Set Error Capture [On]

Perform Script [Sub-scripts, "Find Prop-All-sort"]

Set Field ["zx.propRecCount", "Status{ CurrentFoundCount}"]

Go to Record/Request/Page [First]

Go to Layout ["PROJECT DETAILS"]

If ["CREATION DATE = """]

Set Field ["CREATION DATE", "Today"]

Else

Go to Layout ["PROJECT DETAILS"]

End If

Perform Script [Sub-scripts, "Optimize Windows & Hide Status"]

Active Scripts:

GOTO PROJECT/LOCK ( cps.Proposal.fp5 )

Install Details

Related Contacts

14

Proposal Project Details

Please use normal case text

Add Client to Contacts

Done

CLIENT:

Salutation

First Name

House

COMPANY:

Stock 1402a

ADDRESS:

8564 Washi

CITY:

Culver City

ST:

CA

ZIP:

COUNTRY:

ADDRESS:

CITY:

ST:

ZIP:

COUNTRY:

PROJECT DESCRIPT:

Video System

SALESMAN:

Eddie Mack

TITLE:

Audio & Vi

PROPOSAL DUE

Script Debugger

If ["0"]

Perform Script [Sub-scripts, "Find Phase-sort"]

End If

If ["Status{ CurrentFoundCount} = zx.propRecCount"]

Replace Contents [No dialog, "SALUTATION", "Current contents"]

Replace Contents [No dialog, "CLIENTFN", "Current contents"]

Replace Contents [No dialog, "CLIENTLN", "Current contents"]

Replace Contents [No dialog, "COMPANY", "Current contents"]

Replace Contents [No dialog, "PROPOSAL DESCRIPT", "Current contents"]

End If

Perform Script [Sub-scripts, "Find Phase-sort"]

Go to Layout ["PROPOSAL DETAIL"]

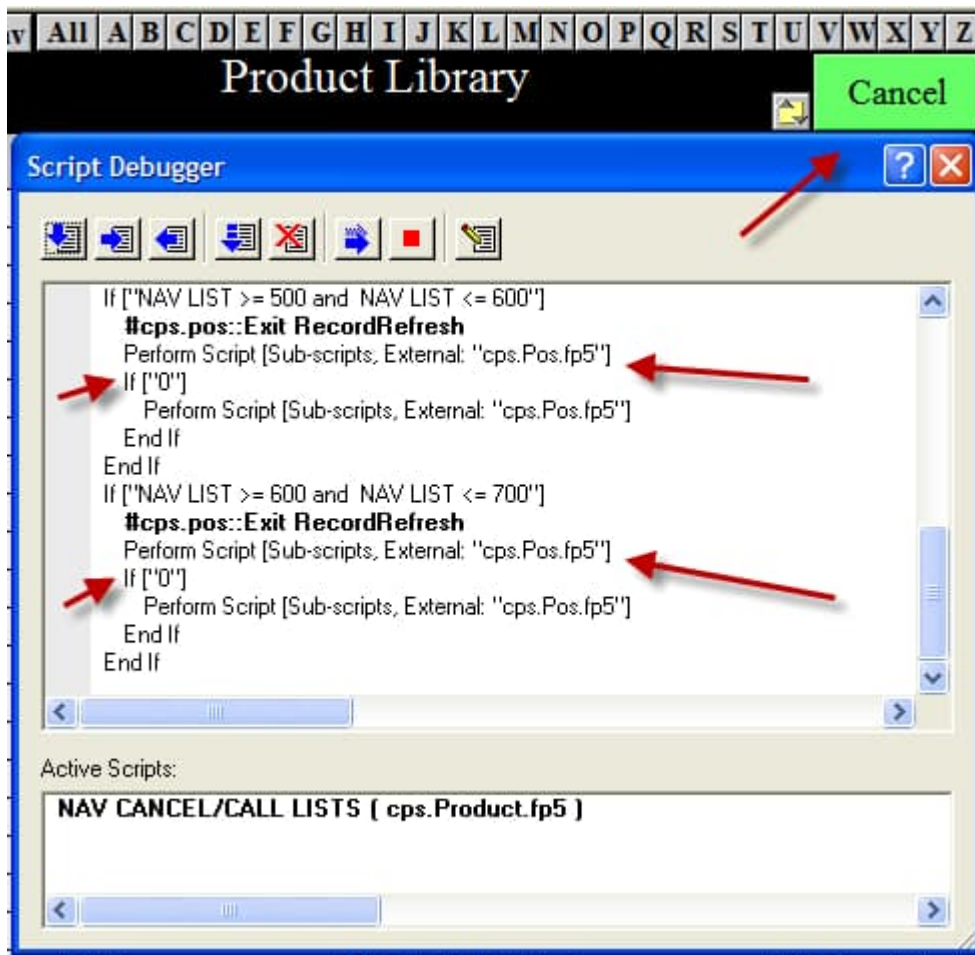
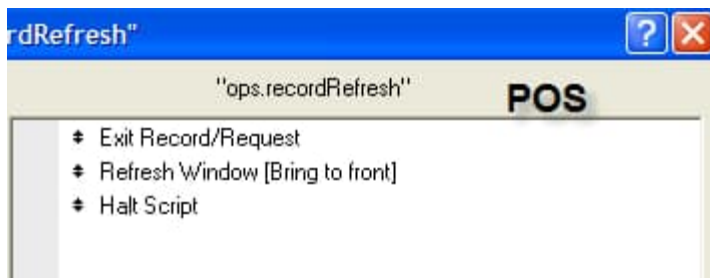
Perform Script [Sub-scripts, "Optimize Windows & Hide Status"]

Active Scripts:

DONE FROM PROJECT ( cps.Proposal.fp5 )

## Fix – POS/Invoices: Cancel from Picking Products

When you are picking products from a POS Invoice and you decide to Cancel from the Product Library instead of Picking a Product, you know are returned to the correct POS Layout that you came from.



Version 7.9v17

#### Enhancement – Proposal/Setup: Parts Tax

You now have an option to add Parts Tax to Products even if the Product itself is set to Tax Exempt. This new setting is in the Master Setup screen for new proposals and in the Proposal Setup screen for existing Proposals.

The Tax Summary screen can be accessed from the Proposal/Pricing screen and shows the tax on each product and the Tax Flag (T, E, I)



Proposal Text	Payment Terms	Other Defaults ?	Master Set-Up	Access Codes	Proposal Numbers	Done
Company Name: EME Audio & Video Systems Address: S15700 Hwy U City: Strum State: WI Zip: 54770 Phone: (715) 287-3335 Fax: (715) 287-4464 Permit #: Permit: 1234			CPS Expiration Date: CPS access is enabled GraphicsDraw! Access not enabled Purchasing Ship To: Warehouse Address Address: 414 W Ridgemont City: Strum State: WI Zip: 54770 Buyer: Jim Engandela			
Switch Company						
RATES		SERVICES		PRINT		
Hourly Cost Sell List Install Labor: \$50 \$70 \$80 Misc Parts Charge: 5% of Equip of Labor A Tax Rates B <input checked="" type="radio"/> 1 7.45% Installed <input type="radio"/> 2 6.00% Added..... 3.00% <input type="radio"/> 3 0.00% Compound 0.00% Tax Labor? NO 2AB Option Tax Misc Parts? YES Tax Parts if Product is Exempt <input checked="" type="checkbox"/>		Extra Warranty? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO 4% of Equip On-Site Service? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO 2% of Equip Tax Services <input type="radio"/> YES <input type="radio"/> NO Services are Added to Misc Parts Suggested Referral Bonus 5.0% Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO		Show List Prices? <input type="radio"/> Show list prices and discount <input checked="" type="radio"/> Do not show list prices Show Tax? <input checked="" type="radio"/> YES <input type="radio"/> NO Show Product Text? Product Prices Guaranteed For: 30 Days Prices Quoted Are: <input checked="" type="radio"/> ESTIMATED <input type="radio"/> GUARANTEED Show Product Listing A Make-Model-Cat-Desc-Fin		

Proposal Text	Payment Terms	Other Defaults	Print Pricing Setup	Proposal Set-Up	Proposal Pricing	Done
<input checked="" type="radio"/> 0 Cash On Delivery <input type="radio"/> 1 Payment Charge <input type="radio"/> 2 Payment Plan <input type="radio"/> 3 Payment Plan <input type="radio"/> 4 Payment Plan <input type="radio"/> 5 Payment Plan <input type="radio"/> 6 Special Terms				Michael Mayall PAYMENT PLANS 100% Payment due upon delivery.		
Use normal style text & do not exceed this text block.				Sub Total: 1,467.85 Tax: 47.81 Grand Total: 1,515.66		
RATES		SERVICES		PRINT		
Hourly Cost Sell List Install Labor: 55.00 70.00 85.00 Misc Parts Charge: 5% % Equip % Labor A Tax Rates B <input type="radio"/> 1 7.75% Installed <input checked="" type="radio"/> 2 10.00% Added..... 0.00% <input type="radio"/> 3 0.00% Compound 0.00% Tax Labor? NO 2AB Option Tax Misc Parts? YES Tax Parts if Product is Exempt <input checked="" type="checkbox"/>		Extra Warranty? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO 4% of Equip On-Site Service? <input type="radio"/> YES <input checked="" type="radio"/> NO Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO 2% of Equip Tax Services <input type="radio"/> YES <input type="radio"/> NO Services are Added to Misc Parts Suggested Referral Bonus 2.5% Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO		Show List Prices? <input checked="" type="radio"/> Show list prices and discount <input type="radio"/> Do not show list prices Show Tax? <input checked="" type="radio"/> YES <input type="radio"/> NO Show Product Text? Product Prices Guaranteed For: 30 Days Prices Quoted Are: <input type="radio"/> ESTIMATED <input checked="" type="radio"/> GUARANTEED Show Product Listing A Make-Model-Cat-Desc-Fin		

Adjust Sales Taxes	Set All Tax = T	Show All	Show Products	Tax Summary							Print Tax Summary	Done
				Michael Mayall								
Qty	Make	Model	Area	Tax Status	Tax A	+	Tax B = Total Tax	Total EQ Sell	Labor Sell	Parts Sell	Parts Tax	
1	OMNIMOUNT	54FB-T	BREAKROOM	T	13.65	0.00	13.65	129.95	140.00	6.50	0.65	
1	OMNIMOUNT	75100 CL	WORKSHOP	T	10.50	0.00	10.50	99.95	70.00	5.00	0.50	
2	OMNIMOUNT	QM100-T	OFFICE	T	12.59	0.00	12.59	119.90	140.00	6.00	0.60	
1	PREMIUM	110RETRO	BREAKROOM	T	7.88	0.00	7.88	75.00		3.75	0.38	
1	PREMIUM	110RETRO	WORKSHOP	E	0.75		0.75	150.00		7.50	0.75	
1	PREMIUM	CABLE OUTLET	BREAKROOM	E	0.53		0.53	105.00		5.25	0.53	
1	PREMIUM	CABLE OUTLET	WORKSHOP	E	0.53		0.53	105.00		5.25	0.53	
1	PREMIUM	PILV-SPECIAL OFFER	BREAKROOM	E	0.35		0.35	69.95		3.50	0.35	
2	PREMIUM	PILV-SPECIAL OFFER	OFFICE	E	0.70		0.70	139.90		7.00	0.70	
1	PREMIUM	PILV-SPECIAL OFFER	WORKSHOP	E	0.35		0.35	69.95		3.50	0.35	

Version 7.9v16

Enhancement – Project/Work Order: Add appointment and install info

Appointment and Install information has been added to the Work Order Invoice and printed WO reports.

Preview Work Order	Print and Post	Work Order Detail		Modify Work Order	Done																				
<b>First Name</b> Jim <b>Last Name</b> Engandela <b>Address</b> S. 15700 Hwy U. <b>City</b> Strum <b>State Zip</b> WI 54770		<b>Invoice</b> 200604 <b>Proposal</b> 165600 <b>Invoice Date</b> 9/5/2008 <b>Posted Date</b> <b>Onsite Hours:</b>																							
<b>Appointment Day</b> Monday <b>Appointment Date</b> <b>Appointment Time</b>		<b>Actual Start Date</b> 1-12-2008 <b>Actual Start Time</b> <b>Actual Stop Time</b> <b>Actual Stop Date</b>		<b>Reschedule</b> <input type="checkbox"/> <b>Shop Dept</b> <b>Installer</b> <b>WO written by</b>																					
<b>Instructions</b> Install Linn cable and remove Ademco in sitting room																									
<table border="1"> <thead> <tr> <th>Zone - Area</th> <th>Qty</th> <th>Make</th> <th>Model</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1 - SITTING ROOM</td> <td>1 ea</td> <td>ADEMCO</td> <td>950W-GY</td> <td>ADEMCO COMM CNTCT</td> </tr> <tr> <td>BANQUET ROOM</td> <td>4 m</td> <td>LINN</td> <td>K400 CABLE</td> <td>BI-WIRE SPEAKER</td> </tr> <tr> <td>BANQUET ROOM</td> <td>1 ea</td> <td>LINN</td> <td>TUKAN PASSIVE</td> <td>CHERRY OR ROSENUT</td> </tr> </tbody> </table>						Zone - Area	Qty	Make	Model	Description	1 - SITTING ROOM	1 ea	ADEMCO	950W-GY	ADEMCO COMM CNTCT	BANQUET ROOM	4 m	LINN	K400 CABLE	BI-WIRE SPEAKER	BANQUET ROOM	1 ea	LINN	TUKAN PASSIVE	CHERRY OR ROSENUT
Zone - Area	Qty	Make	Model	Description																					
1 - SITTING ROOM	1 ea	ADEMCO	950W-GY	ADEMCO COMM CNTCT																					
BANQUET ROOM	4 m	LINN	K400 CABLE	BI-WIRE SPEAKER																					
BANQUET ROOM	1 ea	LINN	TUKAN PASSIVE	CHERRY OR ROSENUT																					

Enhancement – SCPS to CPS

Add Open and Optimize Windows and go to Dev Blank for all files.

Enhancement – Project/Sales Invoice: Add Project Number

The Project number has been added to the Sales Invoice for easy reference.



EME Audio & Video Systems  
 515700 Hwy U  
 Strum, WI 54770  
 Phone: (715) 287-3335 FAX: (715) 287-4464

Invoice Number  
200806

Invoice Date  
9/8/2008

Project  
165300

**Sold To:**

Marty Fern  
 Silver & Freedman  
 2029 Ashdale Pl  
 Los Angeles CA 90049

**Ship To:**

Enhancement – Proposal Invoices/Quickbooks: Rounding of selling price

Quickbooks only uses prices with 2 digits past the decimal point. In order to insure that there are no problems with this, we are rounding the pricing numbers to accommodate this.

Enhancement – Export Proposal or Project to Tyler bookkeeping

Clicking this icon in either a Proposal or Project will export all of the data to a file named: TylerProjectDataExport\_CPS.tab

This file can be opened by Excel.

Project	PO	Proposal Detail			Set Up	Done
Areas	Install	Jim Engandela Horizon Software 1642-00			Pricing	Change Orders
Products	Invoicing				Tracker	Print Menu
Selected Phase		Products: \$37,629.42		Install: \$7,617.00	Misc: \$1,881.49	Subtotal: \$47,127.91
All Phases						Total: \$48,893.93
<b>SYSTEM DESIGN</b> This prop						
1 STUDY HOME THEATER T						
1 ea CUSTOM - LCDH1 -						
1 ea CUSTOM - LL2 - WI						
1 ea DRAPER - ACCESS						
1 ea DRAPER - LVCIII &						

**Message**

Do you want to Export the Entire Proposal/Project or Only the Proposal/Project Products

Tyler Products Entire Prop

Version 7.9v15

Enhancement – Product Library: New Utility View button & QB Accounts screen

The new QB account screen enables you to view all of your products in a List view and assign QB account names to them. Please follow the instructions at the top of the QB accounts screen.

Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Utilities	103 of 103																		
Utility Views	Product Library																		
Inventory	Line List																		
Make																			
LNN																			
LNN																			
LNN																			
LNN																			

**Message**

Go to Labor Utility, QB Account Utility

QB Labor



Find Products	Fav	All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Update QB Accounts in Proposal & Projects		<b>QB Accounts</b>																				Done						
Use only Alpha Numeric characters Account Names. Do not use special characters or dashes Entering QB accounts names will retain these accounts, otherwise they will be blank. Use the Replace button to auto enter your values into multiple products. Important: After changing Account Info. Run the Update QB Accounts button on this screen.																												
Make	Model	Asset	Income	Cost Of Goods	Supplier																							
LNN	5101 PERSONAL	ASSET1	INCOM1	COGS1	LINN PRODUCTS																							
LNN	5120 AKTIV MODULES	ASSET1	INCOM1	COGS1	LINN PRODUCTS																							
LNN	5120 AKTIV MODULES	ASSET1	INCOM1	COGS1	LINN PRODUCTS																							

Enhancement – Project/Invoice: New Invoice Number routine

This new routine insures that duplicate invoice numbers will not be created when creating a new invoice so that only the selected products show up on the invoice.

Enhancement – Project/Invoice: Preview Invoice Optimize window

When previewing a Sales Invoice the preview screen now shows a Continue button that you can click to return to the Sales Invoice screen.

Enhancement – Product Library/Utility: Quickbooks Update Proposal Accounts

When changing the Quickbook Account information on the Product Library/Product Detail screen you can now Updates all of the Account Info on Products in existing Proposals & Projects. This insures that the Quickbooks Project Invoice has the correct information when importing into QuickBooks.

Update QB Accounts in Proposal & Projects
---

<b>Quickbooks Accounts</b>		Asset:	ASSET1
Use only Alpha Numeric characters in Make Model Description and Account Names.		Income:	INCOM1
Entering QB accounts names will retain these accounts, otherwise they will be blank.		Cost Of Goods:	COGS1
Use the Replace button to auto enter your values into multiple products.		Supplier:	LINN PRODUCTS
Important: After changing Account Info. Run the Update QB Accounts in the Utility screen.			

Enhancement – POS Work Orders: Modify POS WO to add more line items.

The number of lines items that can be added to a Work Order now matches the Quotation and Sales Invoices.

Fix – Quickbooks Export: If no Make exists then remove space in the QB Make Model data.

Fix – Logo Screen/Utility/Master CPS Import Utility: Add note Customization Field.

This new field enables you to document any Customizations to the CPS software so that these modifications can be made when upgrading to a new version.

Version 7.9v14

Fix – Proposal/Product Detail: Pick Products Routine

Change the Copy/Paste routine to a Set/Global one to ensure that Products Picked from the Product Library are returned to the Proposal instead of blank -- ---.

### Version 7.9v13

Enhancement – Product Library: Change the Product display fields

On all of the Product Line list screens you can now click on the Make, Model and Description field to view the entire contents of these fields. You cannot modify the data but you can view it. Click on the View button to view the Product Detail.

Fix – Proposal/Product Detail screen: Add Product to Product Library


Adding a product to the Product Library from the Proposal/Product Detail screen now add the product picture and Quickbooks Accounts to the product library.

### Version 7.9v12

Enhancement – Quickbooks Accounts

You can now enter your Quickbooks Accounts into your Product Library/Product Detail screen for each product. Doing this will enable QB to use these accounts when you pump up a Project Invoice into QB.

## Product Library Detail

Quickbooks Accounts	
Populating these fields with your QB accounts will retain these accounts when importing this product into QB otherwise they will be blank. Use the Replace button to auto enter your values into multiple products.	Asset: ASSET1
	Income: INCOM1
	Cost Of Goods: COGS1
	Supplier: LINN PRODUCTS

For Proposals that you have already created you can go in the Proposal/Product Detail screen and enter this info for each product before converting the Proposal into a Project.

## Proposal Product Detail

Capitol Sales Company

Quickbooks Accounts	
Populating these fields with your QB accounts will retain these accounts when importing this product into QB otherwise they will be blank.	
Asset:	ASSET1
Income:	INCOM1
Cost Of Goods:	COGS1
Supplier:	LINN PRODUCTS

For Projects that have already been created you can go into the Invoice/Detail screen and click on the Modify Invoice button and enter this info for each of the products before you print and post the invoice and pump it up into QB.

## Sales Invoice - Detail

Modify  
Invoice

Done

Qty	Make	Model	Supplier	Asset	Quickbooks Accounts			Unit Cost
					Income	Cost of Goods		
1 ea	LINN	5101 PERSONAL	LINN	ASSET1	INCOM1	COGS1		\$245.70
2 ea	LINN	5120 AKTIV	LINN	ASSET1	INCOM1	COGS1		\$135.00
3 ea	LINN	AKITO	LINN	ASSET1	INCOM1	COGS1		\$510.00

Quickbooks Pump up

## Proposal Utility

### Export Invoices to Quickbooks

First create Project Invoices from the Project Invoice screen.  
This will create a file named QBBatch.iif in your CPS folder with Invoices.  
Click this button & Open QuickBooks Pro and select the Invoice module.  
Go to the QB File menu Utilities/Import and select IIF.  
Open the QBBatch.iif file and your invoices will be created in Quickbooks.

Enhancement – Proposal Setup

Add option not to Tax Extra Warranty and On-Site Services. If this flag is Yes or blank these services will be taxed.

**SERVICES**

Extra Warranty? ☒ YES ☐ NO

Charge Client? ☐ YES ☒ NO

of Equip

On-Site Service? ☒ YES ☐ NO

Charge Client? ☒ YES ☐ NO

of Equip

Tax Services ☐ YES ☒ NO

Services are Added to Misc Parts

Suggested Referral Bonus  %

Charge Client? ☐ YES ☒ NO

Fix – Change Order Pricing screen: Set Product Prices to Project Discount

Clicking the Set Product Prices to Project Discount button now correctly applies the Project Discount to all of the prices in the Change Order

Version 7.9v11

Enhancement – Register Secure FM in Proposal opening and Setup files

Version 7.9v10

Enhancement – Proposal/Print Menu: Set all reports to single line spacing

This will improve printing performance and reduce blank or cut off lines



## Version 7.9v9

### Enhancement – Product Library/Utility

Set the Tax – T and trim all Make and Model fields



### Enhancement – Proposal/Product Description Field

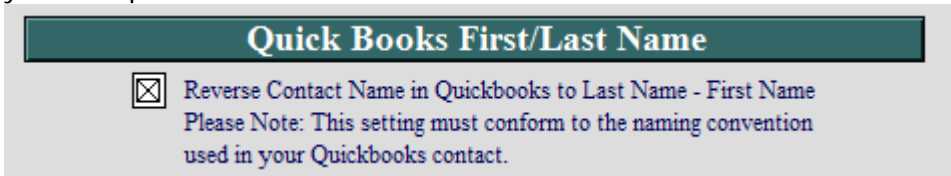
Speed up proposals and printing accuracy by storing these fields, with Local Subset spaces instead of related spaces from the Master Setup file.

### Enhancement – Proposal/Project Detail Screen

Validate the number of records in the project when leaving this screen so that only those records will be updated and not all records in the database.

### Enhancement – Project/Quickbooks Reverse Client Name

If you wish to have the client name reversed in Quickbooks when you create the invoice from CPS then go into your Setup/Other Defaults/Other Defaults 7 and check this box. Please note the special conditions.



### Fix – Quickbooks Export CPS invoice to QB: Tax Exemption

Importing CPS Sales Invoices that are tax exempt no longer puts a tax line item on the QB invoice.

### Fix – Project/Sales Invoices: Tax Amount

Invoice Tax is now calculated on the actual Line Items based on the Tax flag setting on each line item. Tax is reposted when entering or modifying an invoice.

### Fix – Project/Invoice: Labor and Parts Tax

Auto creation of Project Labor and Parts on an Invoice now properly taxes these line items based on the Project Setup Preferences.

## Version 7.9v8

### Enhancement – Project Invoices: Do not show Tax option

Enables you to not show Total Tax on a Sales Invoice. Good for issuing an automatic payment invoice coming from the Payment Plan on a Project.

### Enhancement – Improve the Proposal Pick Products Routine

Automatically strip out carriage returns on Make, Model, Description and Finish so the Pick Products Pop Up list will be more efficient and stable.

Enhancement – Improve the Find Proposal Function

Remove all Copy and Paste functions with Set Field functions so that computer with copy/paste memory problems will perform without error.

Enhancement – Improve Quickbooks Product Export

Exporting CPS Products into Quickbooks now shows the Make Model with a space between them instead of a "-".

#### Version 7.9v7b

Enhancement – Setup and Proposal/Product Listing

Add a new way of listing products in a Proposal (V Make Category Description Finish)

Enhancement – Duplicating Areas:

Change Copy/Paste to Set Field for greater reliability

Trap for same Area Name so that Area names are unique.

Enhancement – POS/Sales Invoice Costing: Commissions

Add 3 levels of sales commissions to the POS Sales Invoice screen and Printed Report. Percentages need to be added to the Setup/Other Defaults 8 screen for these 3 levels of commission based on the profit of the POS Sales Invoice.

Fix – Proposal/Pricing/Cost Price Adjuster

Change this mechanism for greater reliability and access rights from the Setup/Access Codes screen. Also add a button for resetting the cost all products to the original costs prior to the adjustment.

#### Version 7.9v7

Enhancement – POS/Work Orders: Technical Services Defaults

You can now use the Setup/Other Defaults 8 screen to enter Technical Services Description and Hourly rates so that POS Work Orders will pick up these settings. If these settings are blank then the WO Order will default to the info on the left when they are created. The Default Equipment Installation Rate is the Normal Setup Installation Rate.

Work Order Technical Services					
Technical Services	Hours	Rate	Amount	Description	Hourly Rate
Equipment Installation:	0.00	60.00		Equipment Installation:	
		60.00			
Service call 1st 1/2 hr.		45.00			
Ladder Service Min.		75.00			

Fix – Proposal: Pick Product pop up.

Fix the pop up list by changing the product display in Product to a stored calculation.

Fix – Secure FM.

Engage Secure FM when opening CPS logo screen if Secure FM is installed. This will insure that the Secure FM has expired message will not appear.

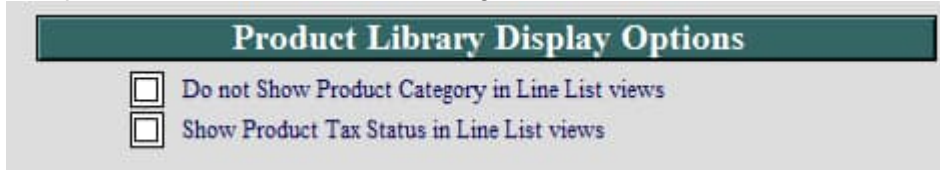
#### Version 7.9v6

Enhancement – Proposal Detail Screen: Speed Enhancement

Speed up this screen by storing all totals calculations at the top of the screen.

Enhancement – Product Library: Line List screen options

Setup Other Defaults 7 screen settings



**Product Library Display Options**

☐ Do not Show Product Category in Line List views

☐ Show Product Tax Status in Line List views

Enhancement – Proposal/Print Menu: Warehouse Pallet Report option

Setup Other Defaults 7 screen settings



**Proposal Report Options**

☐ Warehouse Pallet Report - Show SKU number instead of Phase

Enhancement – Proposal/Print Menu: Install Sales Invoice #2

This new report shows the SKU number of the product and the Extended Totals of each product.

#### Version 7.9v5

Enhancement – Proposal/Pricing Screen: Adjust Proposal Cost Prices

Users can enter a default percentage in Setup/Other Defaults/Pricing and this percentage will show up when creating new proposals in the Pricing screen. Users can then use the Adjust Proposal Costs Update button and reset the costs of all proposal prices with the specified percentage. This option can be defeated or enabled in the Master Setup/Access Codes screen.

Enhancement – Proposal/Print Menu: Increase Product Description field

Increase the size of the Product Description field to accommodate 4 lines instead of 2 on all reports.

Enhancement – Proposal/Pricing Discount Adjustment

Users can now enter an item in a proposal as a discount item and give it a negative qty and a dollar amount and CPS will show this amount in the Courtesy Discount section of the Contract, if the Show List and Discount option is set to "Yes" in the Master & Proposal Setup screen.

Fix – Delete Completed Projects: Done button returns to Completed list

Done button on the Delete Completed Projects now returns to the Completed list instead of the Project list.



## Version 7.9v4

### Enhancement – Proposal Print Menu/Show Print Dialog for Mac Users

Mac users can now select a print or pdf driver because the print options menu shows when printing any document from the Proposal Print Menu.

### Enhancement – Proposal Detail/Export Proposal button with Products Data

This feature now gives you an option to export all Proposal data or only Proposal Products.

### Enhancement – Proposal Print Menu: Add Mac Show Print Dialog Checkbox

Mac users can check this box and the Mac Print Dialog window will pop up when printing Proposal sections enabling you to change print drivers to pdf drivers.

### Fix – Open Net sequence/Labor Log

If the Labor Log file has no records it automatically adds one so that this file can be shared.

### Fix – Product Updater File

All references to this old file have been removed. Please notify Horizon if you come across any Open File windows that claim “Can’t find Updater.fp5”.

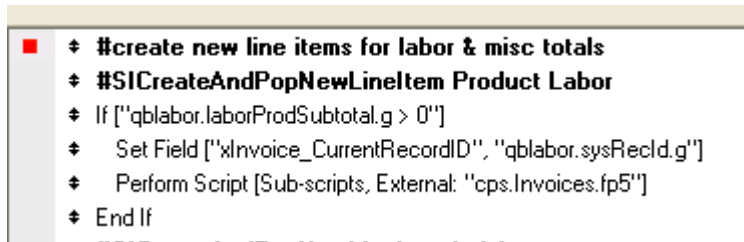
### Fix – Proposal/Pricing/Commissions: Builder Commissions

Builder commissions can now have a 0 value without creating a commission amount.

## Version 7.9v3

### Fix – Project/Invoices: Estimate and Invoice Labor

Product labor now is included in the Estimate and Sales Invoice.



## Version 7.9v2

### Enhancement – New logo screen navigation providing direct access to more modules

Enhancement – Completed Module: New module enabling you to complete your projects and have them automatically moved into the Completed screen.

### Enhancement – Contact: Add email capability.

The email icon to the right of the email & information field will automatically send an email to that contact if an email address in the field.

Delete	Add Task	Add Contact	Contact Detail		1 of 2	Find	Done
Dup	Add POS	Transactions ?	Jim Engandela - Horizon Software		Print Merge	Other Info	
Category: Vendor		Group: sss	Class: class	Key: key	Status: fffff		
		Identifier: fffff			Staff: fff		
Company: Horizon Software		Fav:	Web Address:				
Fav	First Name	Last Name	Key	Title	Salutation	E-Mail & Information	eMail
<input checked="" type="radio"/>	Jim	Engandela	<input checked="" type="radio"/>	President/Develop		horizonse@trivest.net	
<input type="radio"/>			<input type="radio"/>				
<input type="radio"/>			<input type="radio"/>				
<input type="radio"/>			<input type="radio"/>				

Enhancement – Project/Sales Invoices: Add Labor and Misc Parts totals to Invoice automatically. When you create an invoice you will now be asked if you want it to include the Product and Additional labor as well as the Parts amounts from your project.

Create Sales Invoice	Quickbooks Estimate	Sales Invoicing		? Show All	PO	Done
			View Invoices	WO	SI	
Project Labor & Misc Totals		Jim Engandela - Horizon Software		Auto Set Invoice Qty		
		1003-00 v1		Clear All		
Product Install Labor	\$2,870.00					
Installation	\$330.00					
Engineering	\$0.00					
Travel	\$0.00					
Training	\$0.00					
Project Management	\$0.00					
Prep & Travel Time	\$264.00					
Other Labor						
Parts & Materials:	5,992.10					
Make Model		Unit Sell	Proposal Sold	Qty to Invoice	Invoiced Qty to date	Remaining to Invoice

Enhancement – Project/Sales Invoices: Add QuickBooks Estimate  
You can now create an Estimate in Quickbooks automatically. Clicking on the Quickbooks Estimate button will create an estimate invoice. If you print and post that invoice it will be loaded into the QB batch file that can be exported and then imported into QB.

Create Sales Invoice	Quickbooks Estimate	Sales Invoicing		? Show All	PO	Done
			View Invoices	WO	SI	

CPS Main Logo/Utility screen

Export Estimate to Quickbooks	<p>First create Project Estimates from the Project Invoice screen.</p> <p>This will create a file named QBBatch.iif in your CPS folder with Estimates .</p> <p>Click this button &amp; Open QuickBooks Pro and select the Estimate module.</p> <p>Go to the QB File menu Utilites/Import and select IIF.</p> <p>Open the QBBatch.iif file and your Estimate will be created in Quickbooks.</p>
-------------------------------	--

Enhancement – Project/Sales Invoices: Add Payment Amount and Balance Due to the Sales Invoice.





Fix – Reset Secure FM - Reset Secure FM for increased reliability in both Proposal and Setup files.

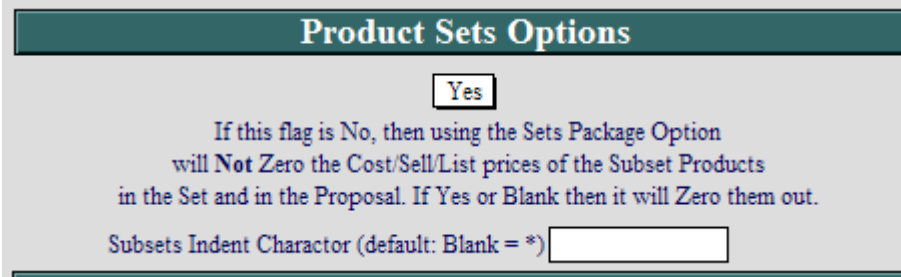
Version 7.8 v13

Fix – Proposal/Pricing: Discount. Proposal Discount is now the difference between the Product, Parts and Labor List Prices and the Sell Prices. If a Product does not have a List Price the List Price will be the sell Price, so the List Price will be accurate.

Version 7.8 v12f

Enhancement – Indented subsets

Product Subsets can now be indented in a proposal using the Setup/Options 7 screen.



**Product Sets Options**

If this flag is No, then using the Sets Package Option will **Not** Zero the Cost/Sell/List prices of the Subset Products in the Set and in the Proposal. If Yes or Blank then it will Zero them out.

Subsets Indent Character (default: Blank = \*)

Enhancement – Quickbooks Invoicing

Add Phone number

Add Company if Name doesn't exist in CPS

Enhancement – Project & POS Ship to address for multiple companies.

PO's. Complete all 8 multi company fields and connect ship Address to PO's.

Enhancement – Format all zip codes to caps

Enhancement – New Follow up letters relationship for improved reliability over networks.

Fix – Change Order tax (when using additional labor)

Tax on Additional Labor when using Change Orders now works properly.CO tax fix.jpg

Fix – WO labor Time (get WO labor to match the Project print menu WO)

WO labor time fix.bmp and WO labor time fix2.bmp

Version 7.8 v12e

Enhancement – POS/Quotation: Duplicate Quotation feature

Version 7.8 v12d

Enhancement – Proposals can't be printed if the equipment margin falls below the GP% set in the Access Code screen.

## Version 7.8 v12c

### Enhancement – Proposal/Product Utility: Update Product Costs to Product Library Costs

A new button on the Product Utility screen enables you to update all of the product COSTS on products in a Proposal to the current Product Costs in the Product Library. This only affects the Costs of products. All other Product information will remain intact.

### Fix – Proposal/Client Screen: Update client info

When switching contact info or updating a current contact all info is now updated on all records of the Proposal.

## Version 7.8 v12b

### Enhancement – Project/PO: Update PO Qty with receiving Qty

If you check the Setup/Other Defaults 7 check box for this option, then the PO qty will be reduced when you enter a receiving qty. This enables you to create ongoing PO's for products without doubling up the PO qty.

### Enhancement – Proposal/Product Detail/Add Product to Library: Add global

Stamping the current proposal record into a global field makes this routine more stable in different computer and networking environments.

## Version 7.8 v12

Enhancement – Setup: Update Secure FM with new plug ins and mechanism for FileMaker 5 & 6.

Enhancement – All Files: Update all Upgrade import Maps with Matching Names

Enhancement – Logo Screen: Add Enable Menus button in upper left corner and print menu lower left corner.

### Enhancement – Proposal/Detail: Done Button

Add a condition that won't replace all records if the found count = record count.

### Enhancement – Product Library: Product Full Description

Rework full description with ":" between fields and trims to prevent popup value lists from having carriage returns.

### Fix – Proposal/Print Menu: Proposal by Phase Subtotals

Fixed Proposal Phase Totals report, parts and item subtotal fix

### Fix – Proposal/Proposal Product summary reports

All products now show even if the product category is blank.

Fix – Proposal/Print Menu: Product Specs rack spaces  
Fixed Proposal Product Spec Report Rack Spaces total

#### Version 7.8 v11

Enhancement – Proposal/Project: Pick Contact and Subcontractors: add a new contact pick list screen just for changing contact names on a proposal. Remove the replace contact info routine in Proposal: DONE FROM PROJECT script.

Enhancement – Proposal/Print Menu: Show Print Dialog (PC & Mac) option in the print menu under the Print Setup button.

Enhancement – POS Invoices and Quotations: Increase the product make : model : description text to show more information on each product.

Fixed Proposal Phase Totals report, parts and item subtotal fix

#### Version 7.8 v10

Fix - Make all Proposal and screen, area text fields 1800 pixels long.

Add - The Scope of Work module now enables you to add text from the Pick Text Library to a new proposal section. This section can be printed with any proposal.

#### Version 7.8 v9

Add - POS Add Print Preview to all POS Invoices

Add - Proposal Print Spool 1

This button will print the Cover Page, Areas & Products section, Extra Text Pages section, Contract and Extra Contract in one document. By changing the Print Setup (button on Print Menu screen) to a PDF driver a single PDF can be create for this spool and emailed to a client.

Add - Proposal Product Sets Package Display

This utility will enable you to create Product Sets with a designated Package subset that will show and print the Package subset first and remaining Subsets directly underneath the Package subset in a Proposal. Another feature enables you to make the Package subset hold the total price of the subset (and set it to whatever price you want) and the remaining Subsets to \$0. Or to have the Subsets hold their original price.



## Version 7.8 v7

Add – Increase Change Order number limit to unlimited instead of 10

Add – More reliable timeline tracker that accurately shows all installation phases of all Project in chronological order with Project and Salesman info.

## Version 7.8 v5

Add – Project Phase Descriptions to Master Project Timeline Tracker

Fix – Product Sets

Adding a Set from the Pick Product process not stays in the product set.

Fix – Proposal Product Summary report

Remove - - from the 1<sup>st</sup> blank record

Add – Proposal Dates

Add a button to change today's date to the creation date

## Version 7.8 v3 - 7.7

Enhancement – Proposal Products

Auto Replace feature that enables you to select all of the same products in a proposal and change them to another product all at one time. Great for upgrading all of the volume controls, etc. in a proposal.

Enhancement – Project Work Orders

Completely new work order and invoice mechanism for Projects for increased reliability and functionality.

Enhancement – Quickbooks

Completely new QuickBooks linkage to CPS. More reliable and works with all versions of QB up to 2005. Make line items in QB show up as inventory parts.

Enhancement – Proposals/Auto Fees

New setting in Prefs enables a Project Management Fee to automatically be entered into the Other Labor section as a percentage of Labor.

New setting in Prefs enables a Pref & Travel Time Fee to automatically be entered into the Other Labor section..

Enhancement – Project Work Order Report

New Special Work Order report that shows all of the labor time required for each phase of the installation.

Enhancement – Proposal Area Summary with Tax report

This report which can be added to a proposal shows the totals for each Area in the proposal including Tax for each area.

#### Enhancement – Proposal Technical Services report

This report which can be added to a proposal summaries all of the product install labor and 6 Other labor categories and amounts for your client.

#### Enhancement – Proposals

Ability to show Tax A and Tax B amounts on the Contract and Invoices including POS invoices.

#### Enhancement – Project Commissions Option

New setting in Prefs enables an optional commission screen and report to show when entering the Project Commission screen. This screen has additional commission parameters for automatically calculating sales commissions for each project.

#### Enhancement – Proposal Omit Product

New setting in Prefs enables you to select a product category that will automatically omit products with that category from the Proposal Product Summary report.

#### Enhancement – Proposal Omit Product Install Labor

Option to not Include the Install Labor Amount into the proposal totals, but Include the Install Labor Time into the Labor Time totals.

#### Enhancement – POS Acceptance Form

New form to give to a customer when he accepts the scope of work on a new project.

#### Enhancement – Task Manager

When entering the Task Manager it now only shows all tasks that are not done.

#### Enhancement – Proposal

Speed up the Product Summary report by posting the unstored calculation.

#### Enhancement – Proposal

Speed up the Product Summary report by eliminating the Find Calc in the View and Print Scripts.

#### Enhancement – Project/Invoices

Restore corrupt records utility. This utility will correct damaged key values so that the proper products get created when Work Orders and Invoices are added. Add a random number to duplicating areas Invoice\_record\_ID to DupArea2. Add a utility to fix existing records.

#### Enhancement – Project Work Orders

Labor time by Phase added to the Special Work order report in the Print Menu.

#### Enhancement – Proposal Area Summary Tax

Tax A and Tax B displays on Proposal Area Summary report with preference in the Master Setup. Tax AB label.

#### Fix – Product Library

Constrain the Category and Description fields in the Product1 Value List so that the Pick List doesn't get overloaded.

#### Fix – Proposal Product Summary Report

Change Qty calc to Make not Unit. Change to Phase Find without Cat script

Fix – Proposal Contract

Combined Equipment and Labor subtotal on Proposal contracts.

Fix – Proposal/Products by Phase

Fix summary amounts in the Products by Phase report

Fix – Project Sales Invoices

Fix 1<sup>st</sup> blank record being created when you create the 1<sup>st</sup> Sales invoice.

Fix – Proposal Areas

Fix the Area Find Product scripts by adding a find newnum2 step so that when entering an area the user stays in the correct proposal.

Fix – Proposal Contract

Fix posting of Payment amounts on the Tracker and 2<sup>nd</sup> contract.

Fix – Proposal/Product Summary report

Fix the indexing of Proposal/Product Summary report.

#### Version 7.6v5 - 7.5

Enhancement – Project Tracker

Improve Project Tracker in the way it manages the 3 states that a proposal is in. Proposal, Project, Done.

Enhancement – Proposal Extra Contract

Add client name to Extra Contact Page and unlock layout

Enhancement – Proposal Print Menu

Add a safety message when using the Print Setup button on the print menu with FileMaker 5

Enhancement – Setup

Setup labor cost & List is now Auto and Manual

Enhancement – Project Shop Tax report

Add an areas and products report with tax

Enhancement – Product Library

Product Library: Add default placement codes

Enhancement – Contacts

Change Shipping label address to draw from setup file.

Fix – Proposal Contract

Extra Contact Page View and Print to post Payment Amounts

Add Post Tracker Amt subscript to View and print Extra Contract Page



#### Fix – Change Orders

Fix Change Orders to correct product and area totals when printing with combined product & labor.

#### Fix – Change Orders

Add multiple copy print to Change orders.

#### Fix – Proposal Product Utility

Fix Zero All Product Labor Hours in the Proposal Pricing screen.

Script: DELETE ALL INSTALL LABOR/from pricing screen.

Add: Set field: Sum 1n =0

#### Fix – Change Order Utility

Fix Zero All Product Labor Hours in the Change Order Pricing screen.

Script: DELETE ALL INSTALL LABOR/from change order screen

Add: Set field: Sum 1n =0

Remove: Replace

#### Fix – Proposal Contract

Fix posting of Payment amounts on the Tracker and 2<sup>nd</sup> contract.

#### Fix – POS

Fix posting of PO's amount when exiting a PO.

Insert: INVOICE DONE BUTTON

In: GOTO PO LIST Stay in Make selected

#### Fix – Project Shop Reports

Fix costing of Sales Invoices and Quotations by add the Cost field to these screens.

#### Fix – Quickbooks Export

Fix QB export so that it converts to FP5. Rename QBexport.iif to Qbbatch.iff. Change the calc field from recordID to record number, so that error messages do not occur when importing into QuickBooks.

#### Fix – Proposal Invoices

Fix Invoices so that line items are not duplicated in invoices when set all qty button is used.

Script: set invoice qty

set field step should set the value to " Case(Invoice remaining qty = 0, "", Invoice remaining qty)" instead of "QTY".

#### Fix – Proposal Labor Utility

Fix Zero All Product Labor Hours in the Proposal Pricing screen.

Script: DELETE ALL INSTALL LABOR/from pricing screen.

Add: Set field: Sum 1n =0

#### Fix – Change Order Utility

Fix Zero All Product Labor Hours in the Change Order Pricing screen.

Script: DELETE ALL INSTALL LABOR/from change order screen

Add: Set field: Sum 1n =0

Remove: Replace

## Version 7.1v5

Enhancement – Add merge fields to the Extra Contact page for Shop name and address.

Enhancement – Sort Proposals by Salesman Initials instead of last name.

Enhancement – Reorganize Pricing Detail Screen for better comprehension.

Enhancement – Add Project Manager initials to the Project list screen and sort button for this list.

Enhancement – Make Report Done buttons return to Reports screen instead of Utility screen.

Enhancement – Increase Warehouse Pallet report fields to 3 lines.

Enhancement – Add the ability to automatically create invoices for each payment phase directly from the Project Tracker.

Enhancement – Make the sell price calculator stay on the correct Product Detail screen and be able to restore the Original Price of the product if required.

Create a new script: Update Product Markup-with unit sell

Attach this script to all Product Detail screens.

Enhancement – Automatically pop up Product Value List when adding a product to the Product Line List or Detail screen.

Fix – Fix the Print Project Tracker button to print both views of the Tracker.

Fix – Fix expiring FM Menu Plug in's

Replace Plug In by copying contents of Plug in folder into the System folder in the FileMaker Pro folder.

Fix – Fix Picking Sub Contractor name when using the Find Contacts button.

Remove the set Global set from Goto Proposal Pick List in Contact

Fix – Fix Find Proposals/Projects so that Enter key does not change proposal number

Add this to Script: Done-Find Proposal

If (Current Mode)=1

Set New="ZX"

End If

Fix – Extra Install amount that is added to a change order is being taxed twice when Labor is taxed.

Add this to Script: Set CO Tax and Grand Total Display

Add this to the step: CO Sum Tax Display (In all 3 times)

(SUM 3 SUBTOT LAB SELL - Extra Install Amount)

## POS

Enhancement – Add Dept and Tech to Work and Service Orders

Enhancement – Enable Find Invoices to find invoices between 2 dates.

Enhancement – Change PO List to show PO reference field instead of Proposal field and sort order.

Enhancement – Add an option to sort Invoices by Date in ascending or descending order.

Enhancement – Add the ability to find PO's by Make and then enter a PO and return to the same Make list.

## SETUP

Enhancement – Add Vendors to Set Multi user script

-Make Open script go to Main Layout screen instead of production screen.

## TASKS

Enhancement – Add Edit to Task Year Date

## TEXT

Fix – -Fix Found Count display

## PRODUCT

Enhancement – Add Install Price Flag to Update Labor Utility

Version 7.0v17c

## PROPOSAL INVOICES

Fix – Fix Printing of Invoices by renaming the Lineltem file to Lineltems and reconnecting links.

Enhancement – Increase size of Make, model and description fields on invoice to accommodate adding serial numbers.

Enhancement – Add a print preview so that invoices can be previewed and reprinted if necessary.

Enhancement – Add a modify invoice override system so that invoices can be changed even after they are posted.

Enhancement – Sort Invoices by Make and Model number.

Enhancement – Add invoice subtotal to invoice screen.

Enhancement – Add unit (each, pair) to each line item.

## CPS SYSTEM

Enhancement – Add FileMaker Plug-in's to disable FileMaker menus for FileMaker Versions 3, 4 and 5. This prevents accidental misuse of menus and can be enabled and disabled by the user in the Setup Other Defaults.

Enhancement – Major improvement in speed, over versions 6.5, by reducing calculated summary fields.

## QUICKBOOKS BOOKEEPING LINK

Enhancement – Add Quickbooks Pro bookkeeping linkage so that invoices can be created directly from within a Proposal and transferred automatically to Quickbooks Pro. Use has control of the batch import into Quickbooks and can verify and post these invoices within Quickbooks Pro as desired. Invoices created in Quickbooks contain a reference to the Proposal Number.

## PROPOSAL & PROJECT MANAGEMENT

Enhancement – Proposals and Projects are now separated for easier management. When a Proposal is sold it becomes a Project and shows up in the Project list.

## AUTOMATED PROJECT MILESTONE TRACKER

Enhancement – Project Milestones can be established for each Installation Phase in the Master Setup screen. Milestones dates are then automatically created based on the number of days specified before or after the Installation Phase date. These Milestones can then be checked off when completed from the Project Tracker. These dates Automatically change as the Installation Phase dates change.

Enhancement – Payment Dates and a running balance of Payments due are also Automatically created and changed as the Installation Phase Dates Change.

Enhancement – Sales, Engineering and Project reviews can now be checked off when complete and Follow-up Letters are Automatically checked off as they are sent.



## Version 6.6v4b

### PROPOSAL

Fix – Fix Archiving Projects so that you return to the Project list after archiving.

Add: Soldg field. Add to Archive Prop-Proj script

Set Soldg=x accepted. If Soldg=yes, go to project list else proposal list.

Fix – Make the move to Next or Previous record in Products only work on Product records and not Area records to prevent product data from being accidentally entered into an area record.

Fix – Fix Project Tracker so that when you change a Phase date and Update the Milestone check boxes stay set as they are. Script: Update Milestones-no message Remove: Reset Items and Reset Needs

## Version 6.6v4a

### PROPOSAL

Enhancement – Add an Extra Contact page to Print menu. This contract limits dealer liability and automatically includes payment terms and amount. This contract can be modified using the “edit” password and the dealer name, state and county should be changed before it is used.

Enhancement – Change Orders-Make taxes show up on CO's when adding new areas.

Set CO Tax and Grand Total Display script. Add replace both display fields.

Enhancement – Change Orders- Add a new Change Order layout to accept printing Products and Install combined totals.

### TRACKER

Enhancement – Automatically create Tasks from the Proposal Tracker. These tasks contain a list of all the equipment to be installed as well as client address and phone numbers.

Enhancement – Tracker reorganize all scripts to accommodate New, Reset and Update Tracker functions.

Enhancement – Make Phase names update when resetting tracker.

Enhancement – Make subsequent phase date change when any phase date is changed and update button is clicked.

Enhancement – Do not change Milestone dates when updating milestones.

Enhancement – Blank out all phase dates and milestones for all phases that do not have a phase name.

### TEXT

Enhancement – Remove going to detail view when clicking on the text title.

Enhancement – Remove the ability to change text ID's in detail view.

### TASK

Enhancement – Go to task after creating it and defining the task, so that this task can be immediately printed or viewed.

## Version 6.6v3e

### Open\_CPS

Enhancement – Remove Open Updater from scripts and in Proposal script to increase opening speed and to open to Proposals.

## PROPOSAL

Fix – Fix Duplicating proposal error message by removing set field from Goto Dup Prop and Project Lists.  
Fix – Fix Change Orders so that the printing doesn't halt. Remove Halt script, add goto layout in CO Set CO number.

## Version 6.6v3d

## PROPOSAL

Fix – Fix Change Orders to reflect Taxed Labor sub and grand totals.  
Fix – Fix Product Summary Report subtotals. Replace Subtotal Eq Sell with Sum9 Subtotal Eq Sell  
Fix – Change Proposal Setup Report vertical radio buttons to check boxes for better printing. #140  
Fix – Remove extra blank page when printing Proposal Setup Reports. #138 and #139.  
Fix – Fix Proposal and Project navigation to ensure returning to proper List view.

## PRODUCT

Fix – Fix Wire Base lookup to Updater. Save a new copy of Product and name as Updater. Change lookup.  
Enhancement – Add Wire Base field to Find Product screen.  
Fix – Fix Newly Imported Products report.  
Script: SET AUTO ENTER FIELDS/FOR ADD NEW PRODUCTS  
Add: Set Field=RCMS New Item Flag,"N".  
Enhancement – Add a Show Pricing Errors button to the Detail List screen.

## POS

Fix – Fix Time value lists by changing A.M. to AM  
Fix – Fix Work Order Tab order.

## Version 6.6v3c

## PROPOSAL

Fix – Fix total wire amount so that it factors in product quantity.  
Enhancement – Change Sold Done Button script; Go to Proposal Detail to Find Phase-Sort and Go to Layout Proposal Detail.

## CONTACTS

Fix – Fix spelling of Create POS  
Enhancement – Add an export contacts to Outlook feature from the Contact Utility screen.

## PRODUCT

Fix – Remove Import with updater lookups on Unit Cost, Unit Sell and Unit List.

## SETUP

Enhancement – Increase Multi-Company feature to include Address and Phone numbers.  
Enhancement – Add a new Access Code verification method.

## VENDOR LIBRARY

Enhancement – Improve Export of products so that you can either untag or delete the products after exporting.

## DATAHOLD

Enhancement – Enable auto Multi/Single user mode.

## POS

Fix – Fix Time value lists by changing A.M. to AM

Fix – Fix Work Order Tab order.

## TASKS

Enhancement – When creating a task you can select create another task, goto contacts or go to Tasks. When you go to Tasks you will now be on the task you just created so that you can print it or modify it, instead of ending up at the first task in the list. (Remove the Show All script in Tasks; GOTO MAIN TASK List from Task/Contacts.

Version 6.6v3b

## PROPOSAL

Fix – Fix Sold buttons so that they can be engaged from all screens in Trackers, Lists with Replace.

Fix – Correct reprinting Change Orders so that it stays in current Project. (add newnum2 to Done Find button.

Fix – Correct Reports screen so that all printouts return to the Reports screen.

Fix – Change access code to block Proposals and Projects.

## CONTACTS

Fix – Fix Picking all contacts for fax or letters so that finding all contacts returns to Tag list.

## LETTERS

Fix – Fix Adding Letter Text so that adding returns to either Main letters screen or Pick Letters screen.

## LINK-OPEN\_NET

Fix – Remove Sets, Text, POS from Link so that workstations do not have to open so many files.

Enhancement – Add datahold to Open\_Net so that upgrades can be done from the server.

Version 6.6v3



## PROPOSAL

Enhancement – Major improvement in performance and speed by changing wire amt field to stored calc and cascading 30 fields.

Enhancement – Change Tax 2ab Separate from a Setup related field to a Proposal Field.

Enhancement – Change Sold not Sold field to IsEmpty instead of "" for more accurate display of sold status.

Enhancement – Add Grand Total and Tax to Proposal Detail screen.

Enhancement – Add Client name to SetUp screen.

Enhancement – Add 1 to Degree of Difficulty factor.

Fix – Remove Milestone Label update from Update Milestone button.

## POS

Enhancement – Enable data access to Invoice and Quotation Unit Cost and Unit Labor.

Enhancement – Add baselines between line items on Quote and Invoice printouts.

## LETTERS

Enhancement – Add Presidents value list and edit to Specialists title.

## SETUP

Enhancement – Add Master Setup to Setup screen header.

Enhancement – Redo Setup Up Milestone tracker defaults

Version 6.6v2a

## PROPOSAL

Enhancement – Separate Proposals and Projects. Manage and track both Proposals and Projects separately. Archive, Delete, Duplicate and Track Proposals and Projects separately. Proposals become projects when they are sold.

Enhancement – Add an automated Tracker system that sets install phases based on days pre/post phase 1 start date. Sets the payment dates based on pre/post cue days from phase 1 start date. Sets the Engineering Milestones based on days pre/post cue days for each phase.

Enhancement – Make Sales Commissions available in Pricing screen even when proposal is Sold.

Enhancement – Add a Reports button and screen to the Main Logo screen.

Fix – Fix Installation Status to not show area records. Delete "Find Phase" step from script: Goto Install Status List.

Fix – Fix Change Orders so that adding new products get flagged as sold, so that Find Products for purchasing works.

Fix – Fix Tracker Sold button to work only on a single proposal and return to the proper screen.

Version 6.5v8c

## POS

Enhancement – Improve POS Work Order and Change Order by removing condensed fonts and enabling data entry on Work Order

## Version 6.5v8ab

### PROPOSAL

Enhancement – Improve duplicating proposals with new numbers. Faster and more stable.

Fix – Fix Change Order Preview from removing the CO number

Script: View Subscript Remove: Update x after print

Enhancement – Improve Change Order print message default to not include costing report when printing CO.

### CONTACT

Enhancement – Improve Bypass button for more logical operation.

Script: Goto Proposal Pick List Add: Set field "Global Prop Pick Contact, 801

Script: RTN Prp cancel all Add: Add new prop Contact Fix 1 2 3

## Version 6.5v7

### PROPOSAL

Enhancement – Add a new method of creating a proposal called Direct Build.

Fix – Fix deleting all products in product list to stay within proposal.

## Version 6.5v6

### PROPOSAL

Enhancement – Add Location field to Proposal Product Status screen and report. To Sort by location click on the location header and then click on Print or View report. This field can be used for any purpose such as special orders, etc.

Enhancement – Add a Product Summary report to the Proposal Store Print menu. This report summarizes all product quantities, has unit and total prices, salespersons name and blank reference line.

Enhancement – Add sections numbers to all Printed Proposals.

Enhancement – Improve Commission Table to have commissions be a percentage of Product, Labor and Parts profit. Make overhead factor be a percentage of total profit.

Enhancement – Add Clear Add to Product Library and NetLock buttons to Utility screen.

Enhancement – Add an Export Proposal button to the Proposal Detail screen. Both for exporting to CPS and Excel.

Enhancement – Add an Import Proposal button to the Utility screen.

Enhancement – Add a Printer Set-up button to the Proposal Print menu.

Enhancement – Enable Product Text to show on Areas & Products printout and Product Summary or Only Product Summary.

Enhancement – Add Warning notice if the Gross Profit of the Proposal Products fall below a minimum value set in the Master Setup file.

## PRODUCTS

### Enhancement – WIRE AMOUNT & FACTORS

A base dollar amount for connecting wire can be added to each product in the product library.

This base dollar amount can be increased in the proposal for each product based on factors for better and best quality cable types. These factor preferences are located in the Master Setup Other Defaults. The Factor Type can be customized to suit (ie 2-Phoenix, 3-Monster), however they must start with the numbers 2 and 3 respectively. You may change the Factor Type for each product in a proposal either from the Product Detail screen or from the Pricing Screen/Adjust Product Prices screen. You can also sort all of the products in a proposal by Factor Type.

## POS

Enhancement – Align Qty to right and align specialist, etc to center.

Enhancement – Set Page margins on Invoice and Quotation to automatic.

Enhancement – Add Start and end time, and installer to Workorders.

Enhancement – Add a Done button to Sales invoices and Quotations.

Enhancement – Add line item costing to Sales Invoices and Quotations.

## SETUP

Enhancement – Add Printer Setup, File Sharing, Logo updater buttons to Other Default screens.

## CONTACTS

Enhancement – Add Horizon & Capitol contact buttons to Utility

Enhancement – Add Export contacts to Pilot button to Utility

Enhancement – Add Export contacts to WinFax button to Utility

Version 6.5v5b

## PROPOSALS

Fix – Fix crashing problem by reprogramming GP%

Put back "Enter Preview Mode" after "Perform Script" in OptWin & Hide w/set fields.

Change field: "GP Equip Total" to number type.

Create new script: "GP Equip Total" with set field: "GP Equip Total=Sum/Sum9.

Add this script to "Optimize Summary field settings"

Enhancement – Speed up processing:

Change Fields: Item disc unit, Item discount and System discount to number type.

Fix – Fix Labor Log print out so that margins are not clipped off.

Version 6.5v5

## PROPOSALS

Enhancement – Make Install and PO Status screens reflect Phase settings.

Script: Goto Status List – subsript

Change: Find Prop-All-Sort to Find Phase Sort

Script: Goto Install Status List



#### Add: Find Phase Sort

Enhancement – Add access to setting phases button on Install and PO Status screens

Add 9 & 10 to Goto Phase script and Done Set Phase

Fix – Fix Edit password enabling customization of the Proposal Extra Text Pages.

Fix – Remove “Enter Preview Mode” from OptWin & Hide w/Set Sum Fields script.

#### POS

Fix – Fix Invoice Costing, by copying the Unit Cost field from the Print Invoice Cost layout onto the Invoice screen and shrink the field horizontally to 0 and place next to the Tax field.

Fix – Fix the Printing of the Invoice Cost form by setting all repeating fields to align top and to Sliding.

#### TASK

Enhancement – Add Created by to Tasks input screens and reports.

Enhancement – Add serial number to Task input screens and reports.

#### PRODUCTS

Enhancement – Add a Quickbooks product utility to export products into Quickbooks and create items.

#### SETUP

Enhancement – Change master access code system to connect with Proposals and Point of Sale and the presence of ZX that will exit CPS. Place clear all in custom label.

#### GRAPHICSDRAW

Enhancement – Change Impact file names to remove blanks so that they will remain the same after being compressed.

### Version 6.5v4

#### PROPOSALS

Enhancement – Change Access Codes to function on Goto Proposal Detail screen and POS/Contacts.

Fix – Fix picking client with Find Contacts so that it returns to New Proposal and not Existing Proposal. Change Contact script: Goto Proposal Pick List and delete: Set Field(Global Proposal Pick Contact, 801)

Fix – Fix Change Order so that reprinting a Change Order does not change the CO number.

Goto script: CO Set CO Number (2/3 way down list)

If (COgNumber="" or COgNumber=0)

Set Field: Change Order Number,1

Else

If (Change Order Number="")

Set Field: Change Order Number,CogNumber + 1

Else

Halt Script

End If

End If

## ARCHIVE

Enhancement – Bring import fields up to date from Proposals

Version 6.5v3

## PROPOSALS

Enhancement – Rebuild demo 3x6 template from Proposal List to remove some corruption.

Enhancement – Change tab order in Product Line list: Add 3,4,5 to model, unit & list.

## SETUP

Fix – Fix Labor Rate GP% calculation. Field: Labor Cost 1 add 1-().

## POS

Fix – Fix auto closing of POS when window is set to Maximize.

Script: Optimize Windows & Hide Status.

Change: Minimize to Maximize

## PRODUCT

Fix – Fix Cancel button in Product Utility Import Quickbooks.

## GRAPHICS DRAW!

Fix – Shorten template file names to 8 characters so that names stay the same when compressed.

Version 6.5v2

## PROPOSALS

Enhancement – Add capability to duplicate proposals with either a new Version number or a whole new Proposal number.

Enhancement – Add Degree of Difficulty to Product Installation Labor to factor new construction Vs Retro.

Enhancement – Sort Project Tracker by Proposal Number

Enhancement – Automatically set Tracker flags to indicate which follow up letters have been sent.

Enhancement – Improve Purchase Order flow when printing/modifying POs.

Enhancement – Improve Adding a New Proposal flow when adding new client information.

Enhancement – Add a Product text field to Change Orders to enable explanations of Changes.

Enhancement – Automatically set PO quantities when adding Change Order items.

Enhancement – Add 2 lines to Address's in Proposal Project and Contract reports.

Enhancement – Add a Salesman's signature to Contracts.

Enhancement – Change Tax A totals to 0 when tax flag=I (Penny)

Enhancement – Add H, I, J, K Show Product Listings (Bodley)

Enhancement – Add Engineering and Install Review to tracker.

Enhancement – Add Proposal Payments and balance due to project tracker.

Enhancement – Add a report that prints only Sold Proposals with proposal total and amount due.

Enhancement – Add a Misc. Parts charge based on a percent of Install Labor as well as Equipment.

Enhancement – Add Misc Parts and Overhead and Net Profit to Sales Commissions.

Enhancement – Improve Blank Change Order form.

Enhancement – Add Proposal Subtotals and Grand Totals to Proposal Detail Screen.

Enhancement – Remove User 2 Name and Client terms field from Pricing screen and print out. (#136)

Fix – Fix Show/Don't show Area Text on Custom Proposal Print Menu.  
Fix – Fix Print Area Summary report that returns to a debug screen after printing.  
Fix – Fix Timeline Tracker to accept all formatted dates.  
(Script: Goto Timeline tracker, change Paste TL Fdate to TL Date)  
Fix – Remove the (W) phone label that comes from Contacts.  
Fix – Fix Product line list so that deleting a product, list stays in the current area.  
Fix – Fix Area Summary totals on Regular & Custom proposals to combine Product & Labor.  
Fix – Fix total tax to include Product, Other and Adjust Labor instead of just Other labor.  
Convert Empty T and Empty N to Calculation fields.  
Add Sum 1n clean ZX only field. (Mark Adam)  
Fix – Fix Product Labor amount by subtracting Difficulty amount.  
Script: Set\_Labor Sell for Products. Add Difficulty to formula.  
Fix – Fix Change Orders so that reprinting a change order does not change the CO number.  
Fix – Fix posting of Proposal profits after updating global prices.  
Fix – Fix posting of Proposal grand total without sales tax to the Proposal list.

## PRODUCTS

Enhancement – Add Subtotals by Make to Product Status Report.  
Enhancement – Add a "Post Modified Dates" button to Product Utility  
Enhancement – Add buttons to Import, Export and print products to Product Utility.  
Enhancement – Add a Vendor Product Library to add selected products to the CPS Product Library.  
Enhancement – Instructions: In the CPS Product library, click on Product Utility and then click on Open Vendor Library. Use the Find Products button in the upper left hand side to find products by make or other criteria. Use the Tag/Untag buttons to select the models you want to include and then click on the Export button and these products will be added to your CPS product library.  
Enhancement – Add a script to automatically import QuickBooks Pro data and groom the imported data.  
Enhancement – Add a Utility that automatically adds a 4 digit number to model numbers to keep them unique  
Enhancement – Increase the Inventory Status quantities to 4 individual locations (Hughes)  
Enhancement – Sort Labor in the Labor Utility to show all products that have no labor times.  
Fix – Fix staying in found set when switching between Line List and Detail List views.  
Enhancement – Increase the date field formatting to show complete dates.

## CONTACT

Enhancement – Add Creation Date field to the Find Contact screen to enable searching of contacts by date.  
Enhancement – Add a Palm Pilot export feature that brings your contact information into the Pilot.  
Enhancement – Add a WinFax export feature that brings your contact information into the WinFax.  
Fix – Fix pop up lists in contact detail so that tabbing between fields does not pop up lists.

## TASKS

Enhancement – Add a Completed section to each task to indicate when, what and who did the task.  
Enhancement – Add a completed (Done) button and the ability to Show/not Show Done Tasks.  
Enhancement – Improve flow when adding tasks with and without contact info.  
Enhancement – Increase Remarks field to several lines.

## POS

Enhancement – Increase line items from 25 to 50 for Quotes and Invoices.



Enhancement – Add a button to Zero all installation labor on any invoice or proposal.  
Enhancement – Add a Delete button directly on each POS invoice.  
Enhancement – Improve POS speed and numbering reliability by eliminating the Max Invoice number.  
Enhancement – Add a Comments field to Purchase Orders.  
Enhancement – Remove costing display on Invoices so customers won't see them.

## SETUP

Enhancement – Increase the Dual Logo capabilities from 2 logo's to 8. Also switch Cover text, etc.

## VENDORS

Enhancement – Add a Vendor Library that contains manufacturer products. This Library is opened from the Product Library, Product Utility screen. Products in the Vendor Library can be found based on any criteria and exported automatically into the Product Library.

## GRAPHICSDRAW!

Enhancement – Great New Features:  
Automatically create Proposal Diagrams with the click of a button.  
Automatically create Task Calendars with the click of a button.  
Automatically create Installation Timeline Reports with the click of a button.

Version 6.5v1

## PROPOSALS

Enhancement – Add capability to duplicate proposals with either a new Version number or a whole new Proposal number.  
Enhancement – Add Degree of Difficulty Factor to Product Installation Labor Times.  
Enhancement – Sort Project Tracker by Proposal Number  
Enhancement – Automatically set Tracker flags to indicate which follow up letters have been sent.  
Enhancement – Improve Purchase Order flow when printing/modifying P.O.'s.  
Enhancement – Improve Adding a New Proposal flow when adding new client information.  
Enhancement – Add a Product text field to Change Orders to enable explanations of Changes.  
Enhancement – Automatically set PO quantities when adding Change Order items.  
Enhancement – Add 2 lines to Address's in Proposal Project and Contract reports.  
Enhancement – Add a Salesman's signature to Contracts.  
Fix – Fix Show/Don't show Area Text on Custom Proposal Print Menu.  
Fix – Fix Print Area Summary report that returns to a debug screen after printing.  
Fix – Fix Timeline Tracker to accept all formatted dates.  
(Script: Goto Timeline tracker, change Paste TL Fdate to TL Date)  
Fix – Remove the (W) phone label that comes from Contacts.  
Fix – Fix Product line list so that Deleting a product, list stays in the current area.  
Fix – Fix Area Summary totals on Regular & Custom proposals to combine Product & Labor.  
Fix – Fix posting of Proposal profits after updating global prices.  
Fix – Fix posting of Proposal grand total without sales tax to the Proposal list.  
Enhancement – Add Misc Parts and Overhead and Net Profit to Sales Commissions.  
Enhancement – Improve Blank Change Order form.  
Enhancement – Add Proposal Subtotals and Grand Totals to Proposal Detail Screen.

## PRODUCTS

- Enhancement – Add Subtotals by Make to Product Status Report.
- Enhancement – Add a “Post Modified Dates” button to Product Utility
- Enhancement – Add buttons to Import, Export and print products to Product Utility.
- Enhancement – Add a Vendor Product Library to add selected products to the CPS Product Library.
- Enhancement – Add a Quick books product import utility.
- Enhancement – Add a Utility that automatically adds a 4 digit number to model numbers to keep them unique
- Enhancement – Sort Labor in the Labor Utility to show all products that have no labor times.
- Fix – Fix staying in found set when switching between Line List and Detail List views.
- Enhancement – Increase the date field formatting to show complete dates.

## TASKS

- Enhancement – Add a Completed section to each task to indicate when, what and who did the task.
- Enhancement – Add a completed (Done) button and the ability to Show/not Show Done Tasks.
- Enhancement – Improve flow when adding tasks with and without contact info.
- Enhancement – Increase Remarks field to several lines.

## POS

- Enhancement – Increase line items from 25 to 50 for Quotes and Invoices.
- Enhancement – Add a button to Zero all installation labor on any invoice or proposal.
- Enhancement – Add a Delete button directly on each POS invoice.
- Enhancement – Improve POS speed and numbering reliability by eliminating the Max Invoice number.
- Enhancement – Add a Comments field to Purchase Orders.
- Fix – Remove costing display on Invoices so customers won't see them.

## VENDORS

- Enhancement – Add a Vendor Library that contains manufacturer products. This Library is opened from the Product Library, Product Utility screen. Products in the Vendor Library can be found based on any criteria and exported automatically into the Product Library.

## GRAPHICSDRAW!

- Enhancement – Great New Features:
  - Automatically create Proposal Diagrams with the click of a button.
  - Automatically create Task Calendars with the click of a button.
  - Automatically create Installation Timeline Reports with the click of a button.

Version 6.1v1e2

## PROPOSALS

- Enhancement – Add H, I, J, K Show Product Listings (Bodely)
- Fix – Fix total tax to include Product, Other and Adjust Labor instead of just Other labor.
  - Convert Empty T and Empty N to Calculation fields.
  - Add Sum 1n clean ZX only field. (Mark Adam)

Enhancement – Remove User 2 Name and Client terms field from Pricing screen and print out. (#136)

Fix – Correct Product Labor amount by subtracting Difficulty amount.

Script: Set\_Labor Sell for Products. Add Difficulty to formula.

Fix – Add Engineering and Install Review to tracker.

Fix – Fix Change Orders so that reprinting a change order does not change the CO number.

Fix – 6.1v2d Change Tax A totals to 0 when tax flag=I (Penny)

## CONTACT

Enhancement – Add Creation Date field to the Find Contact screen to enable searching of contacts by date.

Enhancement – Add a Palm Pilot export feature that brings your contact information into the Pilot.

Enhancement – Add a WinFax export feature that brings your contact information into the WinFax.

Fix – Fix pop up lists in contact detail so that tabbing between fields does not pop up lists.

## PRODUCTS

Enhancement – Add a script to automatically import QuickBooks Pro data and groom the imported data

Version 6.1v1e1

Enhancement – Add Degree of Difficulty to Product Installation Labor to factor for new construction vs Retro.

Version 6.1v1d

## SETUP

Enhancement – Increase the Dual Logo capabilities from 2 logo's to 8. Also switch Cover text, etc.

## PRODUCT

Enhancement – Increase the Inventory Status quantities to 4 individual locations (Hughes)

## PROPOSAL

Enhancement – Add Proposal Payments and balance due to project tracker.

Enhancement – Add a report that prints only Sold Proposals with proposal total and amount due.

Enhancement – Add a Misc Parts charge based on a percent of Install Labor as well as Equipment.

Version 6.1v1c

## CONTACTS

Fix – Fix Cancel button when adding a new proposal on the contact screen. Goto RTN PRP CANCEL ALL and move all END IF 's to complete 123 If statements. (Maglinger)



## PROPOSAL

Enhancement – Change the pop up menu from coming up when adding a new product and move it to the model field. Goto ADD ITEM/Done from Add Area Screen, ADD ITEM/Detail1, ADD ITEM/AREA TEXT, ADD ITEM/AREA LIST = Change Go to Field from Product Value List to MODEL. (Edenfield)

Enhancement – Add option to print Proposal Setup screen or not when printing Proposal Pricing report OR PROJECT @ COST. Go to PRINT PROP PRICING SCREEN script 40% and add options. (Maglinger)

Fix – Fix Change Order printing to stop multiple cost pages from printing . Change CO Print Pricing Report script to PRINT CURRENT RECORD.

Enhancement – Add an option to check or change PO quantities before viewing or printing PO's, (Maglinger)

Enhancement – Create a new script: Check product quantities before viewing or printing

Enhancement – Add this script to VIEW PO's, PRINT PO's, PRINT PO's from Status

Fix – Fix labor log adding labor entries up instead of one entry at a time.

1. Goto Script: Done Install/post all

2. Remove step: Set Field (Installer Time, Installer Time+Hours Item User Used)

## UPDATER

Fix – Fix multi-user mode for update=add one product to updater file with model "Z". Optional remove updater from Link file, open file script.

## PRODUCT

Enhancement – Add script to Labor Utility to Reset Labor Lookup Que="L" to engage labor rate from setup file. Also go to Print menu and reset all print status flags.

Version 6.1v1b

## PROPOSALS

Enhancement – Change Orders printing more than one pricing page. Goto Script; CO Print Pricing Report and change to Print current record.

## PROPOSALS

Enhancement – Add a feature that enables you to find all products in all proposals that need to be ordered for future jobs. Click on the Utility button and click on Find Products...enter the model number you want to find and click on the Done button. You will get a list of products and proposals that that belongs to. You can then print a report if you like.

Fix – Fix Extra text pages coming from text library instead of setup file.

Goto Area Text Extra field and change lookup to Setupjoinzx and Extra text pages field.

## CONTACT

Fix – Fix employee title field that doesn't pop up when sending faxes.

Enhancement – Change pick contact to select from entire record when creating a new proposal.

Fix – Fix Finding Contacts When adding a new proposal, by removing the Find All step from the Goto Proposal Pick List.

## PROPOSAL

Fix – Fix Duplicating proposals, where an area name is being superimposed on a newly duplicated area when the original proposal area is renamed.

Script: Dupprop 3 done

Add: Subscript after Go to Layout (Proposal Detail)... "Fix old Proposal Areas prior to" which is just after all the Push Areas.

Fix – Fix Area button on Product Detail Screen.

Change Area button to Goto Areas/no lock from Goto Areas/Lock

Fix – Fix error message that does not allow updater to be saved when importing products, by closing updater first.

## CONTACT

Enhancement – Add Follow-Up Section to the View menu to enable you to track multiple follow-up contacts with your client.

Fix – Fix sort by company script.

## PRODUCT

Enhancement – Add a script that prints a report showing products that are added to the imported products, that don't exist in the library.

## Version 6.0v4d

### UPDATER

Enhancement – Add Updater file to the opening sequence and set it to multiuser.

Fix – Reset all Product look-up fields to the Updater file.

Fix – Fix Open\_CPS

### CONTACT

Enhancement – Add a field that indicates when the Status field is blank by displaying an X.

## Version 6.0v4c

### PROPOSAL

Fix – Fix PO Total amounts so that total amount equals PO qty \* unit cost.

Define Fields: Duplicate "Subtotal eq cost raw" and rename to "Subtotal eq cost PO."

Change formula from "Qty" to "Actual PO Qty"

Duplicate "Sum bSubtotal eq cost raw" & name "Sum bSubtotal eq cost PO"

Change to sum on to "Subtotal eq cost PO"

Change all layout total fields in PO and PO summary to "Sum bSubtotal eq cost PO"

Enhancement – Add a message choice to view or print PO's from the PO Status screen.

Enhancement – Rearrange PO Status screen for better user interfacing.

### UPDATER

Enhancement – Open Updater file during opening sequence.

Add Open "Updater" to Open CPS script and Link files.

## Version 6.0v4b

### PROPOSAL

Enhancement – Add total install hours to these reports: Proposal @cost, Install work order, and work order detail.

Enhancement – Set Phase Status for Area records to default to 0 instead of blank.

Script: Add after-Area info

Add Step: Set field(status phase,0)

Enhancement – Redo Tab order on Product screens for better flow from model to qty fields.



## PRODUCT

Enhancement – Make product updater relationship work on model field instead of SKU field.

## CONTACT

Enhancement – Make the Subject on Faxes show up on all faxes when fax merging.

## POS

Fix – Fix alphafinder so that the alphafinder only finds invoices from the right group of invoices that is being viewed.

## Version 6.0v4

### Proposals

Fix – Fix global pricing updater for Margin, by removing the “If selling price=blank from subtotal equipment sell field.

Enhancement – Return to same area after deleting products from the product line list screen while in one area.

Script: Delete 1 tagged products

Add 1step: Set Field(AREAg, Find Proposal Area?)

Script: Delete 2 tagged products

Replicate from master script

Enhancement – Printing Custom Area Summary reports do not return to print menu.

Script: Print Custom Area List.pa

Add: Go to layout (original Layout)

Enhancement – Set Page Breaks-change button label from Push Areas to Set Page Breaks

### Contacts

Enhancement – Redo Contact Field tab order.

## Version 6.0v3c

Enhancement – Improve CPS opening sequence.

Enhancement – Add a Scroll Screen up/down button to all List screens.

Enhancement – Add a “Go Home” (to Main Logo screen) button to each screen and remove hidden buttons.

### Proposals

Fix – Fix duplicating proposals single digit number alert-Bill Ketts.

Fix – Fix Templates so that the Setup Labor Matrix is used when adding a template.

Fix – Script: Add Product/Fast Routine (2 clicks)

Add: Set Field SKU Flag=Setup Constant:SKU Flag

Script: Add after-Setup info

Verify: Set Field (SKU Flag, Setup Constant::SKU Flag)

??Make sure Master Setup file is not blank.

Fix – Fix Change Order from automatically setting all added products to T=Tax

Script: CO-Modify Products & Modify Pricing/from change order

Clear: Set Field (STATUS TAX=T)

Fix – Fix Change Order so that Actual PO Qty reflects the deleted qty of the Change Order. Baker

Script: Goto Change Order List/From Delete Detail

Add after Paste (Qty)

If(Actual PO Qty="")

Go to Layout

Else

Enter Find Mode

Enter Browse Mode

Set Field (Actual PO Qty, Suggested PO Qty)

End If

Fix – Fix POS Invoice number updater by moving the Setup import button to the 1<sup>st</sup> position on the Master Import Utility screen.

Fix – Fix Area Text screens to show only text from that specific record.

Go to each Area text screens #98 99 100 101 102 103 and in Browse mode set View as Form from Select menu.

Fix – Fix Area Text to clear old pick text quantities when entering Text Library from proposal.

Goto Text file. Script: "Find Picked Text for Clearing" (at bottom of list)

Click on 1<sup>st</sup> step and the add "GoTo Layout" (Pick List).

Enhancement – Add Change Orders-Sequential serial numbers or user entered. Larry - Hometech.

Enhancement – Add a Pricing Report (Job Costing) to the Change Orders. Larry – Hometech

Enhancement – Add an Install Action Flag to the Installation Workorders to show the Status of each product.

Enhancement – Add a Message Choice when adding a new product to the Product Library.

Enhancement – Add a Message Choice when canceling from contacts when adding a new proposal.

Enhancement – Add a Message Choice to Print Proposal blank PO's from the Proposal print menu.

Enhancement – Add a button in the Project screen to add the current client info to the Contact Manager.

Enhancement – Add a script to export a proposal to a FileMaker File. This script ensures all records are found.

-Improve Product Line List by moving product buttons to the left side of screen.

Enhancement – Add a Message Choice to go to PO or Install Status.

Enhancement – Add the ability to Print Installation Workorders from the Install Status Screen.

## Contact

Enhancement – Change sort order of AlphaFinder and Find Contacts to Client Last Name and then Company.

Enhancement – Change Address label to primary address instead on current address on contact detail screen.

Enhancement – Change AlphaFinder sort order to list clients first and then companies.

Field=Find Bar 1<sup>st</sup> Char Sort. Change "ZZZ" & Company from "ZZZ" & Contact

## SETUP

Enhancement – Change shop address to show state in normal case and with a comma between city, state.

## POS

Enhancement – Change sort order of AlphaFinder to Client Last Name and then Company.

Enhancement – Change default invoice sort order to descending on all POS Invoice list screens.

Enhancement – Add an ascending/descending invoice number sort button to all POS Invoice list screens.

## SETS

Enhancement – Make Qty list go away after entering quantity. Add a blank field and Tab into it from Qty.

## LINK

Enhancement – Add a Set Multi User/Single User script step to the opening sequence.

## Version 6.0v2c

### Proposals

Enhancement – Redesign all area screens for better user interfacing.

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### Text

Enhancement – Improve clearing of pick text numbers when entering the text library from proposals.

Add a new “Flag find calc” field and change “Find picked text for clearing” script to point to the new field.

## Version 6.0v2b

### Proposals

Enhancement – Make value lists for client address auto entered from contact info.

Fix – Fix Change Order after printing to remove “X” only on one specific proposal.

Enhancement – When exiting CPS change Clear NL so as not to reopen the setup file again.

Enhancement – Add all client phone numbers to printed proposals.

### Products

Enhancement – Add a vendor list report to the script menu.

Enhancement – Add a labor utility screen to assist with setting install times to each product.

Enhancement – Move Global Pricing Utility to Detail List screen.

### Tasks

Enhancement – Increase Task print field to accommodate more task info.

Fix – Fix single record print task detail script.

### Contacts

Enhancement – Add a choice to print a Full Detail report or a Semi-Detail report of each contact that excludes the other info and the transaction log.



## Letters

Enhancement – Set spelling checker to not spell as you type.

## Version 6.0v2

### Proposals

Fix – Fix duplicating proposal problem that deletes areas from original proposal.

Script: (2 clicks down on scroll bar)

Goto proposal detail screen

Step: If("Find Proposal Area? =" or Find Proposal Area?=Newnum2

Specify: Add to end; or left(find proposal area?,6)<>newnum2

Script: (scroll between create & rename buttons, after Push scripts)

Fix old proposal areas prior to FP3b 5.2v5

Step: Set Field ("Find Proposal Area?", "Newnum2 & Area

Specify: Change to; If(Find proposal Area?=" ", Newnum2 & Area, Newnum2 & middle(Find Proposal Area?,7,50))

Enhancement – Improve screen refreshing time by setting sum fields only when entering Proposal Detail, Proposal Pricing and Print Menu screens.

Enhancement – Add "Clear NL" to Close File script in insure Net Link is cleared by closing CPS.

Fix – Fix Pricing password feature, to go to Product Detail list and View Product Detail.

## Version 6.0v1d

### System

Enhancement – Remove "Horizon" password. "CPS" password remains.

Enhancement – Change opening sequence (Link, Open Net, Open CPS) to open fewer files for faster opening.

Enhancement – Remove graphic buttons that conflict with Quick Time for both Windows & Mac.

### Proposals

Enhancement – Make Proposal fields accessible for the "edit" password.

Enhancement – Set auto page set-up for Mac consultation forms.

Enhancement – Add Product text to Change Orders.

Enhancement – Add user definable subtotal labels to Change Orders.

### Proposals

Enhancement – Add a password protection option to block proposal and product pricing screens. Enter this password into the Set-up file.

Enhancement – Remove sort when adding a product to the Proposal Product Line List. (delete "Proposal Sort-Master" script from the "Add Item/Line List")

Enhancement – Add Make-Model-Description to Product Full Description default calculation field.

#### Contacts

Enhancement – Improve Find feature when finding by first or last name to select all contact names.

Fix – Fix Update Serial Number button. (re-attach).

#### Products

Enhancement – Add a field to store Invoice or Serial numbers to Products Quantities for products that are sold or received into inventory in the Product Status screen.

#### POS

Enhancement – Add printing grid lines to the Quotation or Sales invoice layouts.

#### SETS

Enhancement – Add a better explanation of Sets Utility for auto updating subset prices.

### Version 6.0v1c

#### System

Enhancement – Increase CPS opening speed by eliminating summary calculations.

(Master Omit = Omit/Find Omitted) (Add Master Omit to beginning of Open Proposal File 1&2 & delete Find All, Goto Logo Screen, GD Go to GD Menu, Go to Print Utility, Done from Upgrade Utility)

#### Proposals

-Fix Duplicating Proposals from 6.0v1b=Clear sort step from Dupprop 1 script.

Enhancement – Increase navigating speed by converting 4 summary fields to scripts (Opt Sum Field Settings)

Enhancement – Increase the speed of the Tracker by indexing the Creation Date field.

Enhancement – Prevent duplicating a proposal without a suffix number.

#### Proposal Product Detail

Enhancement – Add a clear area text of product details button to Area Utility.

#### Contacts

Enhancement – Add a duplicate contact button to easily create a duplicate of a contact.

Enhancement – Add a label switch to determine if a mailing label shows the contact name or company or both.

Enhancement – Increase the Printed size of the Notes and Transaction History fields.

-Fix the Print button for the Transaction Log.

Enhancement – Change Category, keyword, class, status and staff, fields to self-generating value lists.

Enhancement – Increase Fax printed page margins to 1" for better faxing.

#### Product Library

Enhancement – Add a report to the Product Status screen that shows products to be ordered or overstocked.

#### POS

Fix – Fix the AlphaFinder to show both Company and Contact last names for each alphabet.

#### Updater

Enhancement – Add the product updater file to the CPS folder to restore product details after importing.

## Version 6.0v1

### System

Enhancement – Add an Information Library to store miscellaneous data for quick reference from Logo screen.

Enhancement – Add NetLink file to be copied to network workstations to enable improved Host connection.

Enhancement – Add Auto Single/Multi User Networking to Accesses Codes screen in Master Set-Up file.

Enhancement – Add 1999 Capitol Sales product catalog with over 2000 products, to Product Library.

Enhancement – Update all Help screens.

Enhancement – Add Mail Merge button to Logo screen that goes to pre-made follow-up letters for Proposals or to the Contact print menu to create merged letters, faxes and mailing labels.

Enhancement – Consolidate the POS and Contact buttons into one button that enables you to create a POS invoice or a task from one contact list.

Enhancement – Add NetLock feature to Product and Set Library to improve network handling of Library usage and to prevent products from being accidentally added to the wrong proposal. Someone else on the network can still add products one at a time to a proposal when the Libraries are in use.

Enhancement – Add Window Size feature to the Set-Up Other Defaults. This enables you to determine the size of the CPS screens. Either they will expand to the size of your monitor or they will only expand to show all of the CPS screen information.

Enhancement – Add a Master Upgrading Utility that enables you to import data from all CPS files from one screen. After importing each file is flagged as Done so that you can keep track of your progress. This feature is accessed from the main Logo screen “Utility” button.

### Master Set-Up

Enhancement – Add 6 Other Labor Rates to Other Defaults.

Enhancement – Add Software Preferences to Other Defaults.

Enhancement – Add Show Product Listing to Other Defaults.

Enhancement – Add Window Settings to Other Defaults.

Enhancement – Add Proposal Subtotal Labels to Other Defaults.

Enhancement – Add Network Access numbers to Access Codes.

Enhancement – Add Tax Misc. Parts flag to tax or not tax Misc. Parts.

Enhancement – Add Text Formatting rulers to the Proposal Text screens.

Enhancement – Add Password Protection to Access Codes. This feature can be used to require a to sell/unsell a proposal and can be implemented in other areas of the CPS software.

Enhancement – Add Dealer Proposal Print Menu to Access Codes. This can be used to create a special looking proposal for your company. Call Horizon Software for details.

Enhancement – Add 6 more screens to the Proposal Text and Other Defaults to make entering the correct set-up data easier. Make all Proposal labels such as Project Page Headers, Sell, List & Discount price and Subtotals, as well as the POS WorkOrder header.user definable from the Set-Up Other Defaults screen.



## Proposals

Enhancement – Add Find Proposal, Find Favorite, AlphaFinder and screen navigator buttons. These enable you to find proposals by any criteria, by your favorites and alphabetically.

Enhancement – Add an Amount field that posts the total amount of the proposal to the Proposal list so that you can find or sort by the amount of the proposal.

Enhancement – Improve flow when adding a new Proposal, by going to Pick Contact first and then to Project screen.

## Proposal Project

Enhancement – Separate Project Info screen into 3 separate screens. Project Details, Install Details and Subcontractors for better user interaction.

Enhancement – Add goto next/previous page and first/last record buttons and change Modify Areas button to Area Utilities.

## Proposal Products

Enhancement – Add goto next/previous page and first/last record buttons and change Modify Products button to Product Utilities.

## Proposal Product Detail

Enhancement – Change Total Product price to reflect Global discounts.

Enhancement – Redesign Product Pick list, Add product to Library button and Area name for better user interaction.

## Proposal Area

Enhancement – Prevent Find All condition when viewing Areas by Phase.

Enhancement – Enable Text to be added to the Text Library directly from the Proposal.

Enhancement – Add a button to delete each area text block.

Enhancement – Add a text ruler button that enables easy text formatting and indenting.

Enhancement – Enable Text to be brought into proposal from the Text Library while retaining all formatting, by using the Text ID lookup.

Enhancement – Speed up processing when adding a product to an Area, by moving the clear text library script to the goto text library button.

## Proposal Pricing

Enhancement – Redesign Pricing screen for better user interaction.

Enhancement – Change product tax flags to calculate Tax even if the flag is blank.

Enhancement – Add Gross Profit percentages to the Installation Labor, Misc. Parts and Total Proposal price.

Enhancement – Add 6 Other Labor categories. These categories and their associated labor rates can be auto entered as Set-up default. Amounts for these categories can be entered in Labor Hours, Labor Dollar Amount or as a percentage of the Product Labor (those hours assigned to install each product).

Enhancement – Redesign the Adjust Selected Product Prices screen for better user interaction and add Labor fields.

Enhancement – Add a global price adjustment selection, List-Cost, that sets the selling price to a percentage of the difference between the List price and the Cost of each product.

Enhancement – Add a Sales Commission screen that calculates commissions as a percentage of Product profit; Labor sales and total commissions.

#### Proposal Set-Up

Enhancement – Add a setting to Tax Misc. Parts.

Enhancement – Enable all Proposal Text to retain Text formatting settings.

Enhancement – Add a setting to display products in the Proposal 14 different ways such as Make-Model-Description or Make-Description.

Enhancement – Add a button that automatically updates the Proposal Cover Text and the Extra Text pages to the master Set-up defaults. (Karnes)

Enhancement – Add a button that automatically updates the Proposal Other Defaults pages to the master Set-up defaults. (Karnes)

Enhancement – Add 6 more screens to the Proposal Text and Other Defaults to make entering the correct set-up data easier. Make all Proposal labels such as Project Page Headers, Sell, List & Discount price and Subtotals, as well as the POS WorkOrder header, user definable from the Set-Up Other Defaults screen.

#### Proposal Product Status

Enhancement – Add Product tracking that enables you to keep track of Purchase Order quantities Sold, In stock, On Order and automatically displays total quantity needed for each project. Also enables you to set actual PO order quantities and print PO's from the Status screen.

Enhancement – Add Install tracking that enables you to keep track of Products Installed and Install Labor for each product as well as the Other Labor charges. Displays Quantity and Time Sold, Installed and remaining as well as over installed.

Enhancement – Add an Install Labor Log that automatically posts Installer and Project Manager commissions and prints a comprehensive payroll report.

#### Proposal Change Orders

Enhancement – Add Password protection to the enable a Proposal to be "Sold" or "unsold".

Enhancement – Allow Proposal Pricing and Setup screens to be accessed when Proposal is Sold. (Davco)

Enhancement – Redesign Change Order screen for better user interaction.

Enhancement – Add the ability to adjust Global discounts for change order products.

Enhancement – Add the ability to add Labor charges to the change order.

Enhancement – Add the ability to adjust Misc. Parts charges.

Enhancement – Add the ability to view Product details and to delete an unwanted change order product.

Enhancement – Add the ability to view the Change Order before it is printed.

Enhancement – Add the ability to reprint a previously printed change order.

Enhancement – Add the ability to modify Area Text descriptions.

Enhancement – Add a Change Order number to each printed change order.

Enhancement – Auto enter markup fields with global discount when deleting item qty to keep prices the same.

Enhancement – Add the ability to change the print settings to show/not show Area Text, Product Text, List Price and Sales Tax.

#### Proposal Print Menu

Enhancement – Add the Extra Text Pages section to be included in the print whole Proposal button.

Enhancement – Consolidate Main and Custom Single reports screens into the Main and Custom print menus for better user interaction.

Enhancement – Add a Push Areas feature to the Custom Proposals that enable you to move to manually move areas in your printed proposal to adjust how they fall across page breaks.

#### Proposal Printed Reports

Enhancement – Add a report that shows all products in a proposal organized by phase.

Enhancement – Add the ability for all Area Text in a proposal to retain their Text formatting settings. (Bold etc)

Enhancement – Change the Header Bar to display your company name on reports that have no Logo.

Enhancement – Add product unit prices to the Product section of the Proposal.

Enhancement – Make the Proposal subtotal labels user definable for Products, Install and Misc. Parts.

Enhancement – Add Notes section to Purchase Orders.

Enhancement – Make all Proposal labels such as Project Page Headers, Sell, List & Discount price and Subtotals, as well as the POS WorkOrder header.user definable from the Set-Up Other Defaults screen.

#### Contacts

Enhancement – Completely Redesign Contact module for more flexibility and better user interaction.

Enhancement – Add a Pick button to each contact to create a POS invoice or Task for each contact.

Enhancement – Add Find Favorites to the Contact list.

Enhancement – Add more names, phone numbers, fax numbers for each contact.

Enhancement – Add a More Info screen to each contact that enables you to store customized data.

Enhancement – Add a Tickler flag to each contact to assist in Sales Follow-up.

Enhancement – Add Print Merged Letter and Fax buttons to each contact detail.

Enhancement – Add a separate Add Task button.

Enhancement – Add Shipping Labels.

Enhancement – Add Automatic Platform (PC/Mac) scripting to enable correct Print Dialog window to pop up before printing so that the Printers Single Paper Tray can be selected.

Enhancement – Add automatic saving of sent Letters and Faxes to the Letter Library, including letter title, contact name, sender and date.

Enhancement – Add an Import contacts feature to the Contact Utilities screen. Contact file must be upgraded using this feature.



Enhancement – Add a Transaction module that enables you to Post any kind of transaction with your customer and auto calculate Time spent on each transaction for billing purposes. It also maintains a History of these Transactions and prints a report.

#### Contacts Print Menu

Enhancement – Add Print Preview buttons to all Letters, Faxes, Labels and Reports.

Enhancement – Add a Send Personal fax feature that lets you create faxes with no company info.

Enhancement – Add an AutoSave feature to Letters and Faxes that Automatically saves them to your Letter Library for future reference or use. This feature also automatically dates and establishes a letter name to each saved letter or fax.

Enhancement – Add a Print Dialog screen to each print button enable printer tray selection before printing.

#### Letter Library

Enhancement – Add Find Favorites and screen navigator along with improved text editing features.

#### POS Point of Sales

Enhancement – Consolidate the POS and Contact List screens into one screen.

Enhancement – Improve contact serial numbering to ensure correct Picking of contact.

Enhancement – Improve POS invoice numbering to ensure correct numbering in network situations.

Enhancement – Add Find feature to each Invoice List screen.

Enhancement – Add a Change Order to POS module.

Enhancement – Add Quotation Amount to the Quotation list.

Enhancement – Add Invoice Amount and Amount Due to the Invoice list.

Enhancement – Add PO Status and PO Amount to the Purchase Order List.

Enhancement – Add payments and description fields to Sales Invoices with subtotals (Sound Board).

Enhancement – Memo.

Enhancement – Blank out all zeros “0” in number fields, so that blank invoices can be printed without zeros.

Enhancement – Add Quantity Received and Quantity Open to each Purchase Order, with an automatic PO “Open” and “Closed” display to show when PO is filled.

Enhancement – Add a POS Import feature to the POS Utilities so that upgrades can be properly imported.

Fix – Fix POS Quotations from doubling the price of the Invoice when converting a Quotation to an Invoice.

#### Product Library

Enhancement – Redesign Detail List screen for better user interaction.

Enhancement – Add full importing instructions for the RCMS bookkeeping system.

Enhancement – Add a Product Import feature to the Product Utility that automatically saves all of the other product detail info and replaces it for each product after importing. Now you will not loose all of the info for each product each time you import.

Enhancement – Add Perpetual Inventory to the Product Status screen to Track Optimum Quantity, On-Hand Quantity and the difference.

## Product Library Sets

Enhancement – Add full Product detail view to the Model list to make adding subsets easier.

Enhancement – Add Find, Find Favorites and screen navigator to Sets Library.

Enhancement – Correct Total Set price in the Set Report.

Enhancement – Add Find Orphaned Subsets to the Sets Utility that prints a report of all Subsets that no longer have their associated products in the Product Library.

## Text Library

Enhancement – Add Find and Find Favorites to the Text Library.

Enhancement – Add the ability to add Formatting to Text in the Text Edit screen.

Enhancement – Correct printing of one Text block to not show screen interface on report.

## Follow-Up Letter

Enhancement – Consolidate View/Modify Letters screen into the Main Follow-Up letter library to improve user interaction.

## Archive

Enhancement – Bring fields up to date for better Archiving and Reactivating of Proposals.

## New Quick Upgrading Instructions

Enhancement – Since both the Contacts and the POS module have a new numbering scheme it is necessary to Import previous CPS versions using the Utility buttons in each module instead of the old procedure where you went to each CPS file and then went to the File Menu Import Records.

- The best method for upgrading is to use the new Master Updating Utility. It can be accessed by clicking on the “Utility” button on the Main Logo screen. Then clicking on the Master CPS Import Utility button. This new utility makes it very easy to upgrade & import all CPS files from one location.

2. Because of many new Proposal features, it is necessary after Importing from previous CPS versions, to go to the Master Set-Up and review all of your Set-Up settings including the Other Defaults.

Version 5.2v5d

## PROPOSAL

Enhancement – Reconnect “Test Print” button on all proposal reports.

Enhancement – Add Password protection to the sold/un-sell functions.

Enhancement – Add a Confidential Price List by Phase report (Ovation).

Enhancement – Create SOLD password system. (Designer Audio x1).

Enhancement – Add all company info when updating other info in set-up.

Enhancement – Add Dealer 2 Custom Print menu (AV Virtuality).

Enhancement – Go directly to Project data entry when adding a new proposal. (AV Virtuality).

Enhancement – Add date and employee number to Product Status screen and report. (AV Virtuality).

Enhancement – Add 6 Other Labor fields into the pricing screen. (Digitch).

Fix – Fix Equipment and Labor Grand Total to include other labor. (Digitch).

Fix – Fix – Auto enter fields when duplicating proposals and areas to retain original data.

Enhancement – Make PO's and PO Summary reflect total qty on order instead of proposal qty. (AV Virtuality).

Enhancement – Make Misc. Parts taxable or non-taxable and create a master set-up default for this function. (Digitch).

Enhancement – Adjust Product Prices flag T91, Markup Kind=YES, Markup %=0, Phase Flag 0=YES, Qty Installed=0, Received=0, Version-v1.

Enhancement – Allow entry into the Project info screen and viewing of the Set-up and Pricing screens when the proposal is in the “SOLD” mode.

Enhancement – Redo Equipment GP% to more accurately reflect weighting. (SYS EQUIP GP) change weighting to “subtotal eq sell” 1<sup>st</sup> one in list.

Enhancement – Make Price Guaranteed text on Contact and Project Summary variable based on Set-Up flag setting. (Ovation)

Fix – Fix “Do not show list price” flag.

Go to Set-up file. Change value list on “Zextra1”=1 0 instead of months

Go to Proposal file. A to script “Add after-Setuo info” = set field(Z EXTRA1,ZEXTRA1)

## PRODUCT

Enhancement – Improve interface

Enhancement – Add store report- “Confidential Price List by Phase” report.

Enhancement – Add a Location Field. (Digitch).

Fix sort when using FAV by adding a sort by make script to each alpha finder script.

Enhancement – Add new inventory adjustment screen for keeping a running inventory. (Hermery’s)

Fix – Fix Find Favorites to include all items in query.

Remove “\*” from 4 global sets in “Done from Favorite layout” script.

## ARCHIVE

Enhancement – Remove the Pick Product container field to eliminate the importing error message.

## SETS

Enhancement – Change all QTY value lists to pop up menu.

## CONTACT

Enhancement – Change the way serial numbers are assigned to each contact for picking properly by record number.

## POS

Enhancement – Improve all Invoice printed appearance.

Enhancement – Add footers to all reports.

Enhancement – Add modify set-up for all invoices.

Enhancement – Create a separate Quotation data input screen.

Enhancement – Add a new “Find Invoice” feature.  
Enhancement – Add a return to a specific PO List after viewing an existing invoice.  
Enhancement – Eliminate Invoice number summary field for faster operation of POS file.  
Enhancement – Add Invoice Amount to all Invoice lists.  
Enhancement – Add 5 Payment fields and remaining balance to sales invoice.  
Enhancement – Format dealer PO address labels.  
Enhancement – Add FREIGHT field to Invoices.  
Enhancement – Add Purchase Order receiving quantity and open/closed status system.  
Enhancement – Fix Invoice find from list by finding Invoice Calc field instead of Invoice field.  
Enhancement – Add a List-Cost % product selling price adjustment. (HH Greg)

Enhancement – Create a POS Utilities screen for deleting, importing and setting new starting invoice numbers. Invoice numbers are now created by auto setting a number counter to the highest imported invoice number and then adding one number to it each time an invoice is created.

Enhancement – Change invoices to read P.O.#289384 instead of PO63538 etc.  
Add a field named ‘invoice kind Calc” and insert it into field “invoice with date”.

Fix – Fix converting Quotation to an Invoice where the Invoice would double cost.  
Script: CONVERT QUOTE TO INVOICE; move MASTER FIND 1 AND 2 to the end. MASTER FIND 1 AND 2 change Invoice Number to Invoice Calc.. (Gluskins).

## PRODUCT

Enhancement – Add “Status” field to Line Items screen.  
Enhancement – Remove “View” button on Line Items screen.

Enhancement – Create an import script that retains misc. Product data after the import, with a Sets report showing orphaned products. (HH Greg)

## SETS

Fix – Fix Sets total price calculation on Set Report. (Ovation)  
Remove the running total setting on the “Subset Total Price” summary field.

## TASKS

Enhancement – Change “Tomorrow” error message.

## PROPOSAL

Fix – Fix “Do not show list price” flag.  
Goto Set-up file. Change value list on “Zxtra1”=1 0 instead of months  
Goto Proposal file. A to script “Add after-Setup info” = set field(Z EXTRA1,ZEXTRA1)

## PRODUCT

Enhancement – Change all QTY value lists to pop up menu



Enhancement – Add “B-shipping” to calculator.

Enhancement – Have “Make” value list automatically reflects only “Makes” that are products in the Product Library.

Fix – Fix Tax auto enters defaults when adding a new product from a pick list.

Go to ADD PROD/PICK LIST.DETAIL and ADD PROD/QTY LIST.DETAIL

Add perform script (SET AUTO ENTER FIELDS/ FOR ADD NEW PRODUCT) after New Record Request.

Fix – Fix requiring new Set-up password. Solution is to replace file with existing file or reset relationship from product to setup.

## ARCHIVE

Fix – Fix opening file without spelling checker request.

## LETTERS

Fix – Fix opening file without spelling checker request.

## Version 5.2v5c

## PROPOSAL

Enhancement – Add description of product to Product Line list.

Include SKU numbers in Purchase Orders.

Enhancement – Add auto enter Status Phase=0 and Status Tax=T to all Add item scripts.

Enhancement – Add value lists to project second address-state and zip and State.

Enhancement – Add a button in the Product Global Delete screen to reset all Product Placement Codes to N.

Enhancement – Add a button in the Area Global Delete screen to reset all Area Placement Codes to N.

Enhancement – Change Back Up to a compressed copy for faster backups. (Proposal BKUP.fp3)

Enhancement – Change all QTY value lists to pop up menu.

Enhancement – Place a Footer part on all Proposal single page reports such as cover pages and contract.

Enhancement – Change Extra Text Pages print preview to go to print layout instead of data entry screen.

Enhancement – Have “Make” value list automatically reflects only “Makes” that are products in the Product Library.

Enhancement – Add the ability to create a starting proposal template automatically if one does not currently exist.

Enhancement – Create a method for Pushing Areas in the Product section when printing a Proposal.

FINAL SCRIPT FIX: GOTO PROPOSAL DETAIL SCREEN (2 clicks on scroll bar)

Double click on IF(FIND PROPOSAL AREA?)

On second line type or\_Left(FIND PROPOSAL AREA?,6)<>NEWNUM2

Fix – Fix problem finding areas on templates imported from old versions.

Field SAP FIND remove (NEW=Z and) from 2nd & 3rd lines.

Enhancement – Eliminate Product features text from Areas & Products section of Proposal and add to Product Summary only.

Enhancement – Reorder Proposal prints section so that the Project Summary is at the end of the Proposal right before the Contract.

Fix – Fix problem replacing proposal suffix number when duplicating proposals.

Create script: Fix duplicated proposals (This script can be run to fix already dupped proposals)

Go to record/request (first)

Loop

Set Field: FIND PROPOSAL AREA? = NEWNUM2&Middle(FIND PROPOSAL AREA?,7,50)

Go to record/request first(Next) (Exit after last)

End Loop

Insert this new script into DUPPROP 3 Done (before Perform Script (GOTO PROPOSAL LIST))

Fix – Duplication Fix continued:

Change Script "DUPPROP 3 Done"

Click on step "Replace DUPMARK"

Add step "Go to Layout" (PROPOSAL DETAIL)

Fix – Fix PO Summary PO subtotals.

Change Part: Sub-summary by Make (trailing) to "supplier Calc"

Fix – Fix (SORT PROPOSAL-master) script so that products and area sort properly.

Change Define Field: ZONE AREA SORT second line to;

Right("00"&numToText(ZONE),2)&ZONE PLACEMENT & AREA&FIND PROPOSAL AREA?)

Change field name "PRODUCT PLACEMENT CALC FOR SORTING " to "PRODUCT SORT".

Then add &MAKE&MODEL) to calculation after T1

Go to Proposal Detail; Mode menu "Sort" and clear "MAKE" and "MODEL" and add PRODUCT SORT  
Sort list should have only ZONE AREA SORT and PRODUCT SORT; click on Sort.

Change script; SORT PROPOSAL-Master (Open and "OK" and "replace sort order")

Fix 1-SYSTEM DESIGN record label when adding a new proposal.

Go to ADD NEW PROPOSAL

Change script step; Set Field "AREA", 1-SYSTEM DESIGN to SYSTEM DESIGN.

Fix DELETE ALL INSTALL HOURS

Go to script DELETE ALL INSTALL LABOR

Change; Go to Layout (LIST/PRODUCT LINE) to LIST/PRODUCT DETAIL

Enhancement – Add Product features text in Areas & Products section of Proposal and add to Product Summary only.

Enhancement – Push Area-Make record selection stay on AREA when clearing push lines for that area.

Change script: SELECT AREA TO PUSH

Delete step:"Go to record request/page (previous)

## CONTACTS

Fix – Fix Letter merging by replacing merge text field with current text field.

Enhancement – Add “Modify Layout” button to Letters, Fax, Envelopes and Labels.

Fix – Fix Company name-address on Faxes by selecting Setup Constant relationship.

Fix – Fix IMPORT PROPOSAL script from Found to RecordCount.

Enhancement – Add today’s date to POS packing list.

Enhancement – Make serial numbers sequential

Change scripts; Import Contacts - Add new contacts - Add new POS contact - Add new proposal contact

## POS

Fix – Fix finding exact invoice (with correct totals) from Existing Invoice lists and eliminate retaining original quotation.

Change scripts; MASTER 1 FIND INVOICE from copy “invoice” to ‘INVOICE CALC”

MASTER 2 FIND INVOICE from paste “invoice” to INVOICE CALC”

Change Script; CONVERT QUOTE TO INVOICE

Delete; Duplicate Record/Request

Perform Script(MASTER 1 FIND INVOICE)

Got to Layout (SALES INVOICE)

Perform Script(MASTER 2 FIND INVOICE)

Fix – Fix doubling of POS invoices that get converted from quotations

Change CONVERT QUOTE TO INVOICE remove steps:

Duplicate Record

Perform Script(Master 1 Find Invoice)

Go to layout (Sales Invoice)

Perform Script(Master 2 find invoice)

Change:MASTER 1 FIND INVOICE

Copy(Select, “Invoice Number” to “Invoice Calc”

Change:MASTER 2 FIND INVOICE

Copy(Select, “Invoice Number” to “Invoice Calc”

Version 5.2v5

## SETUP

Enhancement – Remove double screen refresh.

Enhancement – Change CPS Version Number to a calculated field so that it isn’t replaced during importing.

Enhancement – Add spell checker to Proposal Text.

## PROPOSAL

Fix – Fix new proposal number and start Aardvark at 1000.

Create a new sort order with CLIENTLN & COMPANY and restore Sort Order in Script “SORT PROPOSAL  
LISTS/subscript. This script is close to the top.

Enhancement – Change Proposal Back-up to a .TAB file called Proposal\_BkUp.tab

Enhancement – Enable Proposal PHASES to be shown with or without SYSTEM RECORD

Quick fix for Selecting PHASES

Change field definition in PHASE FIND FIELD from

If(ITEM NUMBER="000"

or PHASE FLAG 0="YES" or STATUS PHASE="0" or STATUS PHASE="", "P",

TO:

If(ITEM NUMBER="000"

or PHASE FLAG 0="YES", "P",

Enhancement – Add 14 show print “Make-Model-Category-Description-Finish” options and access from Proposal Detail screen.

Enhancement – Change view Extra Text Pages to preview mode in Print Menu Single Reports.

Enhancement – Change Proposal Pricing print report to portrait instead of landscape and add new fields.

Enhancement – Change Proposal Set Up print report to portrait instead of landscape.

Enhancement – Change Proposal Tax Summary print report and screen to include areas and sorts.

Include Client access in SOLD LOCKOUT STATUS status.

Enhancement – Add spell checker to Proposal Text.

Enhancement – Show area text on print out now defaults to “yes”.

Enhancement – Add a button on the Tax Summary screen to reset all Tax Status to “T”.

Fix Parts & Materials Label on pricing report.

Enhancement – Create separate buttons for Print Proposal Prices screen from the Print Proposal Set-up screen.

Enhancement – Reset Import/Export

Enhancement – Make Add Product to Product Line List stay in the Area where it is created.

Enhancement – Make templates trackable once project info (creation date) screen is selected from proposal detail screen.

Enhancement – Improve switching between areas to products and product detail list to line list

Enhancement – Add, “edit” to Product Placement value list on Product Detail and Line Lists.

Enhancement – Make work order one area per page and add total install hours by area to both regular & detail work order.

Enhancement – Make “Edit” password access prints menu screens without alert message “Field not modifiable”.

## POS

Enhancement – Force State in address to show in CAP’s

Enhancement – Add a button to switch back and forth between Contacts and P.O.S.

Enhancement – Change Invoice Type to Title Case for better looking printed invoices.

Enhancement – Improve POS invoice numbers to start with the high-test current number and enable setting a new starting number.

Enhancement – Display “No model number ” message when adding a product without a model number.



## CONTACTS

Enhancement – Make Label test print only 30 labels or one full sheet. Make Envelope.

Enhancement – Add a “Modify Layout” button to the Letter Print screen to make it easy to change page margins.

Fix – Fix “Add New Contact” & “Add new POS contact” & Add new Prop contact” scripts.  
(Change all Set serial: script s steps from “found “to “status(record count)).

Fix – Fix Envelope (landscape) script and lower body to 7” and add “Modify Layout” button to print menu.  
Goto print menu and tag 1 contact.

Goto File menu and select Print Set up (set to Landscape). Goto Print and set to “Records being browsed”.

Goto Scriptmaker and Select “Print all record subscript” and duplicate, then rename to “Print all rec.landscape”.

Enhancement – Open “Print all records.landscape” and click “OK”, click on Print Setup=replace. Open “Print Merged Envelopes”. Connect 1st Perform Script to “Print all rec.landscape”..

Fix – Fix mail merging;

Add “Current Letter Text” field to “Print Merged Letter” layout. Place it off the page to the right.  
Pull bottom “Body” up to the last field on layout. (check for this, it may not be needed)

## Version 5.2v4

## OVERALL

Enhancement – Thread Constant 1 Relationship and Version number throughout CPS.

Enhancement – Complete 2nd company capabilities by adding Proposal Text switching and Switch button with Logo on Print Menus.

## PROPOSAL

Enhancement – Reformat and improve Area Summary report layout for both regular and custom proposals.

Enhancement – Reset Graphics Draw password script with “constant” relationship to set-up.

Fix – Fix calculation of install time and labor charges for units less than 1 minute for total hours.

Enhancement – Consolidate Proposal Text Set-Up onto 1 screen instead of 3 screens.

Enhancement – Change Back-up to DIF format to speed up the back-up process when quitting CPS.

Enhancement – Rearrange Print Menu “Done” Buttons for easier exiting.

Enhancement – Make Proposal Project Summary and Contract Price labels globally modifiable from the Set-Up file.

## SET-UP

Enhancement – Index and Evaluate Constant field for improved relationships.

Enhancement – Consolidate Proposal Text Set-Up onto 1 screen instead of 3 screens.

Enhancement – Make all calculated fields indexed, to ensure a better relational join.

Enhancement – Reset Constant field to a calculated auto entered “1” and remove set constant field=“1” from open script.

Enhancement – Make Proposal Project Summary and Contract Price labels globally modifiable from the Set-Up file.

## CONTACT

Fix – Fix Pager Phone number on Contact Detail printout.

## TASKS

Reset Current Record Print Script so single task reports will print properly.

## PRODUCT

Enhancement – Add actual inventory qty field.

## SETS

Fix – Fix viewing subsets and replacing qty from QTY layouts.

SOLUTION: “Qty/view subsets” & “Find Set Name” scripts;  
change copy set name to Set Field=SETgID and SET ID NUMBER  
change paste set name to Set Field = SET ID NUMBER and SETgID  
Rerun: Update Set ID script.

Version 5.2v3

## GENERAL

Enhancement – Tone down button colors on all screens to Yellow=4 and Green=3

Enhancement – Refine Optimize Windows scripts in all files to increase speed.

Enhancement – Add Dual Company usage capability.

Enhancement – Add Custom Dealer Print Menu

## PROPOSALS

Enhancement – Add Copyright & License agreement to Splash Screen.

Fix calculation of install time and labor charges for units less than 1 minute.

Redo Product Detail tab order to include all value lists.

Enhancement – Add a sort button to both product line list and product detail list.

Enhancement – Increase the length of the specialist-title field on Project and Contract proposal pages.

Enhancement – Spell checks product description and product features with one replaced spell button.

Enhancement – Add a “Zero Product Install Hours” button to the Proposal Pricing Screen.

Enhancement – Reset “Save Changes to Contacts” Import.

Pager from Proposal doesn’t save to Contact.

SOLUTION: Create a new calculated field in Proposal.fp3 called “EXT4”=“CLNT PAGER” field.

Go to a proposal tracker, then switch to Contacts and Import proposal.fp3 with matching names.

Then go to Contact script “Import Proposal” and replace import order. Then delete garbage contacts.

Enhancement – Rearrange Pick Product and Placement buttons/fields on both product line list and product detail list.

Enhancement – All Parts & Services labels on Proposals are now definable in the Set-up screens for Extra Warranty “Yes/No”.

Enhancement – Add a “Install dollar amount” field to the Proposal Pricing Screen to globally add Install dollars to a proposal.

Enhancement – Add a Show Area Price flag to the SELECT SHOW screen. This enables you to print Proposals without any area text.

Fix – Fix Custom Product Summary Report “done” button to enable it to return to the Custom Print Menu Single Reports screen.

#### SET-UP

Enhancement – Add Dual Company Information and Logo Switch. This feature requires a special access code.

#### POS

Enhancement – Make both Invoice Dock layouts the same.

Enhancement – Add Packing List to Sales Invoice.

Fix calculation of install time and labor charges for units less than 1 minute.

SOLUTION: See addendum

#### PRODUCTS

Enhancement – Spell checks product description and product features with one replaced spell button.

Fix – Fix calculation of install time and labor charges for units less than 1 minute.

SOLUTION: See addendum

Redo Product Detail tab order to include all value lists.

Set to “T” when creating a new product.

SOLUTION: Add “T” to Set Field “Status Tax” in script “Set auto enter fields/for add new” Set to text.

#### TIMELINE

Enhancement – Restore import order.

#### ARCHIVE

Enhancement – Bring Archive fields current with Proposal fields and restore import order.

### Version 5.2v2

#### PROPOSALS

Enhancement – Add an option to back-up proposal data when exiting CPS.

Enhancement – Remove “Style Message” field from Client and Project Screen.

Enhancement – Remove version number from Consultation form.

Enhancement – Add unit label to Proposal Product Detail screen.

Enhancement – Add a message when Exiting CPS to create a back up of proposal data on their hard drive.

Enhancement – Remove editing of Logo Screen.

Enhancement – Remove sort when opening Help file.

Enhancement – Remove field messages on Proposal Detail screen when clicking on products or text.

Enhancement – Add “Timeline” file to “Open\_Net” process.

Enhancement – Add, “Edit” to Proposal Description value list on Client info screen.

Proposal extra text pages buttons have been added to the Custom Proposal Print Menu.

Enhancement – Set Proposal s to sort by Proposal Number in descending order.

Enhancement – Improve the Other Defaults Set-Up features. Increase the size and make the Warranty, Service.

Enhancement – Place a Baseline before the List price subtotal on Printed Proposals.

Enhancement – Add new product button on Product Detail List not working. (Hicken)

SOLUTION: Duplicate Product.fp3 script Line Pick/Goto Pick Callist and rename to Detail List/Goto Qty Callist. In this script change Nav List value from 4 to 3. Change Go to layout to "Qty call list". In Proposal.fp3 script "Detail List/Call Product" reset External script to Product.fp3. "Detail List/Goto Qty Callist".

Enhancement – Prevent the possibility of encountering an error message when there are no areas or products in the proposal and the Product or Areas buttons are clicked. (Robin AV Specialists) (Jeff Full Compass).

Enhancement – Re-Tab Proposal Product Detail screen so that the product value list opens after entering the qty.

Enhancement – Add a warning message when leaving the Payment Terms screen, reminding the user to "Update" his changes.

Enhancement – Speed up closing all files when using the Quit button and eliminate the need to enter password when quitting CPS.

Fix – Fix Equipment and Install subtotal Calc.

SOLUTION: 
$$\text{SUBT PLP S EQUIP} = \text{Subtotal Eq Sell} + ((\text{Unit Labor Subtotal}/60) + \text{Installers Msc Labor})$$
$$* \text{round}(\text{Z Labor Rate Sell}, 2) + (\text{Specialist Msc Labor} * \text{round}(\text{Z Labor Rate Sell.sp}, 2))$$

Fix – Round Parts & Services Subtotal for products including install to match regular subtotal. (SUBT PLP S PARTS)

Enhancement – Reset TAB order on product detail screen so picking a product from the list does not pull down Make value list.

Enhancement – Do not show "Pricing Error!" when List price is less than Sell price if the SHOW LIST PRICE flag is set to NO.

Enhancement – Price Text and Parts label user definable and automatically switched depending on the Services "Yes/No" Set-Up settings. This flexibility makes the printed Proposals more customized without having to hard enter text using the "Edit" password.

## LETTERS

Enhancement – Add In-Progress Payment amount field to Follow-up Print Menu and to In-Progress letter.

Enhancement – Follow-up letters adds an extra line to mailing label and gives a Dear "Fax" salutation. (Maglinger)

SOLUTION: Restore Import Order with script "Import PFR data from Proposal."

Enhancement – Make Follow-up Letters done button return to original location; Proposal Logo Screen or Proposal Print Menu screen.

## CONTACTS:

Enhancement – Remove product sort from AlphaFinder after not finding any contacts.

Enhancement – Proposal Contract and Project pages now have a completely flexible regular and extended warranty display that can be modified from the Master Set-Up "other defaults" screen.

Fix – Creation & modification dates not working.



SOLUTION: In Contact.fp3 scripts goto "Add New Contact", "Add New POS Contact", "Add New Prop Contact" and insert a set field "Creation Date" and specify "Today's Date" step after Set Field "serial". Goto layouts "Contact Detail", "POS Pick Contact", "Proposal Pick Contact" and change creation field to "Modification Date".

#### POS:

Enhancement – Allow Finding Existing Invoices by entering Invoice numbers in find mode.

Enhancement – Add more pull down value lists on all invoices.

Fix – Done button occasionally does not work after creating a new invoice. (Hicken) (Davco)

SOLUTION: Goto Contact file and add a "Halt Script" step to the script "GOTO POS MAIN MENU NO SORT".

Fix – Contact Phone Label is not going into invoices. (Welch)

SOLUTION: Goto EDIT/PREFERENCES/LAYOUT and deselect "Add newly defined fields".

In POS define fields, Duplicate "CLNT HOME PHONE" field and rename(save) to "CLNT FUTURE PHONE LABEL".

In "FULL PH LABEL" field definition Change CLT Future PHONE if statement by inserting "CLNT FUTURE PHONE LABEL" before "site Label: " and remove all but ": ".

Reset Lookup on this field to "Phone LABEL". Add "CLNT FUTURE PHONE LABEL" field to each Invoice Set-Up layout.

Fix – Pick products does not return product info from the view product detail "PICK" button.

SOLUTION: In Product .fp3 add "Product Full Description" to the "Pick Detail" layout.

Fix – Some Invoices are printing on 2 pages.

SOLUTION: In layout mode, moves bottom margin up on Invoices so they don't print 2 pages.

#### PRODUCT:

Enhancement – Remove product sort from AlphaFinder after not finding any products.

### Version 5.2v1

#### OVERALL

Enhancement – Include "Read Me First" file with CPS.

Enhancement – Adjust alphabet finder letters for centered Mac conversion.

Fix – Fix "show password" when exiting CPS.

Enhancement – Improve the "Open\_Net" files for launching all CPS files as the "Host" for network users.

#### PROPOSAL

Enhancement – Add "Supplier" and sort by "Supplier" to Product Detail List.

Fix – Fix paste date button in both proposal tracker screens.

Enhancement – Capture error message when canceling "delete records" message when deleting a proposal.

Enhancement – Set proposal product, area, and system prices to "blank" if their value is zero (0).

Fix – Fix Pick contact button so that it clears page number and returns contact page number.

Enhancement – Improve the Graphic al User Interface of the Add and Change Order Product Detail Screen.

Enhancement – Add total price of product and install to the Add and Change Order Product Detail Screen.

Enhancement – Add Finish Dates to Phase 1-5 and integrate these into the Client/Project and Tracker Screens.

Enhancement – Add a Project Manager value list to Client Information.

Enhancement – Fully implement Purchase Orders based on supplier; Factory or distributor.

Enhancement – Add product, install, misc. parts, subtotal and grand total to PROPOSAL DETAIL screen.  
Enhancement – Add unit and total price ascending & descending sort headers to PRODUCT detail and line list.  
Enhancement – Add Area and Product placement default to “N”.  
Enhancement – Raise Quit and Help button on main logo screen.  
Enhancement – Natural sort order when going to the proposal list is by client last name, then company name.

Enhancement – Correct calculation of install minutes.seconds times hourly labor rate for install times less than 1 minute.

This is a change that could impact Sold proposals where installation times for wire were set at less than a minute per foot.

Compare your old “Sold” proposal total prices after they are imported into the new CPS.

Enhancement – Project Tracker; fix paste date into notes, enlarge notes, remove select all from sort notes, add header sort names.

Enhancement – Fix PO’s for products without “raw cost” by substituting “unit cost”. (Add “unit raw cost PO” field & reset “subtotal eq cost raw”)

Enhancement – Fix product placement when adding area’s to “n”. Sort now maintains proper area/product sequence.

## PRODUCT

Enhancement – Add “Supplier” to Find Favorites system.

Enhancement – Add sort by “Supplier” to Detail List.

Enhancement – Find Favorites now does not have to have any flag checked to find all products.

Enhancement – Add a “Print Menu” button to Product Line List screen.

Enhancement – Return from print menu to Line or detail list, which you came from.

Enhancement – Remove product sorts on Done from import.

Enhancement – Make all fields in product lists non-entry fields.

Enhancement – Speed up product library by removing “Record count summary” field.

Enhancement – Add “Delete Products” button to Line list.

Enhancement – Speed up AlphaFinder by removing sort after a “no find” search.

Enhancement – Improve the Graphic al User Interface of the Product Detail Screens

Enhancement – Add creation and fix modifies date to product detail.

Fix – Correct calculation of install minutes.seconds times hourly labor rate for install times less than 1 minute.

Fix – Fix duplicating products so tax, status, phases and opt qty get duplicated properly and remove warranty auto entry.

Fix – Change AlphaFinder s so that product finds stay in the Favorite List. Clicking the “All” button cancels the Favorite list and finds all.

Enhancement – Improve “Importing Utility” with instructions and an import button that doesn’t delete all products first.

Enhancement – Replace Find...OK with a single “Find Product” button and a separate product detail screen to enter the find criteria.

## CONTACT

Enhancement – Add Pager to primary phone selection.

Enhancement – Speed up contact file by removing “Serial max summary” field.

Enhancement – Improve all contact list layouts for better clarity.

Enhancement – Add Fast Find by Phone number to Find Contacts.

Enhancement – Add user definable field label to contact detail.

Enhancement – Improve Contact Detail Layout Graphical User Interface.

Fix task bar date stamp.

Enhancement – Add Notes date stamp.

Enhancement – Add second address line to address field.

Enhancement – Replace Find...OK with a single “Find Contact” button and a separate product detail screen to enter the find criteria.

## POS

Fix – Fix Sales tax calculations on invoices.

Enhancement – Fully implement Purchase Orders based on supplier; Factory or distributor.

Enhancement – Add new Work Order-Sales Invoice.

Enhancement – Add “Modify Layout” buttons to all Invoice Set-up screens.

Enhancement – Remove “Category” from product description to shorten them to fit into invoice.

Enhancement – Set view of all invoices to “form” so that they don’t accidentally scroll up to the top of the page.

Enhancement – Add Payment type (cash) to Invoice and Work order invoice.

Enhancement – Add Job Costing Invoice that can be printed from Quotations and Invoices.

Enhancement – Add go to “Contacts” button.

Enhancement – Add Task Detail button and Print Task detail with Contact Information included.

Enhancement – Add Contact Information to Print Task Log report.

Enhancement – Speed up POS file by removing “Serial max summary” field.

Enhancement – Add Fast Find by Phone number to Find Contacts.

Correct calculation of install minutes.seconds times hourly labor rate for install times less than 1 minute

Enhancement – For Purchase Orders enable the “Ship To:” address to be either the Shop, the Warehouse or the Client.

Enhancement – Improve Total GP% calculation; if an item is such as shipping is given the same cost as sell price the Total GP% shows correctly.

Fix – Replace Find...OK with a single “Find Contact” button and a separate product detail screen to enter the find criteria

## TASKS

Fix – Replace Find...OK with a single “Find Tasks” button and a separate task detail screen to enter the find criteria.

## TIMELINE

Fix – Remove Proposal Due Date from TimeLine report, because it is not relevant to “sold” proposals.

Enhancement – Add Phase Finish dates to TimeLine Tracker and Report.

Enhancement – Add sort by column header titles and enable TimeLine report to be printed with current sort order.

## PRODUCT SETS

Enhancement – Improve management of Sets, by automatically assigning a serial number to each set and subset. This enables the use of identical set names without risk of accidentally merging set names if they aren't unique.

IMPORTANT Special Instructions to update your old set data to the new version.

First Steps:

1. Open your old CPS Sets.fp3 file and go to "Select Menu" and choose "Select All".
2. Go to the "File" menu and choose "Close". Do not choose "Exit" or click on the Done button.

Second Steps:

1. Open the new CPS Set file.
2. Go to "Select" menu and choose "Select All"
3. Go to "Mode" menu and choose "Delete All" to delete the demo set data.
4. Go to "File" menu and choose "Import/Export". Choose Import and find and open your old CPS Set file.
5. At the Field-mapping window, change "View By: to "Matching Names" and click on the "Import" button.
6. At the "Import Options" screen (un-check) the box in front of; Perform auto-enter options while importing and click OK.

Third Step; (after the data importing is completed)

1. Go to the "Scripts" menu and choose "Update Set ID numbers after imports prior to CPS 5.2. You are now updated and won't have to do this procedure again.

Version 5.0v8

## USERS GUIDE

Enhancement – When importing into proposal & archive files, deselect "perform auto-enter...." In import options.

Enhancement – The "horizon" password has been removed. Use only the "cps" password.

Enhancement – To customize layouts open the proposal or letters file and use the "edit" password.

## PROPOSAL

Enhancement – Improve job costing (proposal pricing) and proposal set-up screen dump report

Enhancement – Increase size of placement fields to accommodate "mm".

Enhancement – Add auto insert of tax "t" and phase "1" default to adding of new product

Enhancement – Add tax detail report and add, "fix proposal tax" to script menu

fix and improve "open cps" and "open net" (suggest recover ing"text.fp3" for users having problems) "open net" opens all cps files as the host for network users.

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## CONTACT

Enhancement – Add modification date to each contact



Enhancement – Utility feature-change renumber button to return to contact list  
Enhancement – Add horizon software & capitol sales auto-create script to script menu

## POS

Enhancement – Return to existing invoices dock instead of always going back to pos client list  
Fix – Fix alphabet finder “z” lookup for existing invoices  
Enhancement – Make invoices & quotes with 0 totals in line items print out with blanks instead of zeros

## ARCHIVE

Fix – Fix matching names -field import order-from archive to proposal

## PRODUCT SETS

Fix – Fix sets that are newly created from within a proposal to function properly.

## PRODUCT

Enhancement – Remove auto-sort of products when canceling out of pick lists.

## Version 5.0v7b

## PROPOSAL

Enhancement – Improve proposal debug by adding zone & placement value lists.  
Enhancement – Improve product detail screen layout & add supplier field.  
Enhancement – Add supplier system to purchase orders.

Enhancement – Improve unique area name (Area name can be the same, but zone or placement must be unique).

## PRODUCT

Fix – Fix find favorites system.  
Enhancement – Improve installation utility screen-fix units value list.  
Enhancement – Improve product detail screen layout & add supplier field.  
Enhancement – Improve product print menu-fix do not show list price & install price settings.

## CONTACT

Enhancement – Remove auto sort on main contact screen.

## SETS

Enhancement – Remove auto sort when returning to product library main line list.

## Version 5.0v7

## ALL FILES

Enhancement – Zoom windows to max-improves screen refresh times up to 75%

## POS

Fix – Fix add new POS contact-by adding “find all” to script

## Version 5.0v6e

## OPEN NET CPS

Enhancement – This file will open all CPS files for network hosting

## CONTACT

Enhancement – The open file script has been changed to a non-halting one to work with open net cps

## PROPOSAL

Enhancement – Change proposal detail to make -model-category-description.

Enhancement – Enhance product line and detail list

Enhancement – Enhance area list with a pick products button

Enhancement – Change P.O. to make -model-category-description product list typo from client to model

Enhancement – Make debug screen zone & area fields readily accessible

## Version 5.0v6d

## CONTACT

Enhancement – Add sort to each alphabet finder character

## POS

Enhancement – Add sort to each alphabet finder character

## TASKS

Enhancement – Add sort to each alphabet finder character

## Version 5.0v6c

## PROPOSAL

Enhancement – Change P.O. summary unit cost field to raw cost field.

Fix – Fix edit password for modifying proposal extra cover pages

Enhancement – Change going to main logo screen from start by opening products, text, contacts & setup

Enhancement – Remove sorts when going to products and POS and contacts from main logo screen

## Version 5.0v6b

## PROPOSAL

Fix – Fix product detail list to remove area record when viewing a specific area

Enhancement – Add a pick button to the product and product detail list to pull down relational product listing.

Enhancement – Add other and edit to placement value lists.

## Version 5.0v6

## PROPOSAL

Enhancement – Change presentation name to graphics-draw

Enhancement – Remove “rename phases” button from set installation phases screen.

Fix – Fix selecting products, by phases, when viewing the product detail list by selecting an area

Enhancement – Change area placement default to null

Enhancement – Add change order x flag to proposal debug screen to reselect and print change orders

## TASKS

Enhancement – Change other field to “staff”

Enhancement – Add “edit” feature to activity

Enhancement – Bold contact names and lengthen comment field

## CONTACTS

Enhancement – Change other field to “staff”

## POS

Fix – Fix invoice Calc by selecting 1 when creating invoice. Add omit and find omitted to POS create scripts.

## CONTACT

Enhancement – Create a new script called current print. Landscape to print envelopes better not finished yet

## PROPOSAL

Enhancement – Get at warranty info better

## Version 5.0v5

### PROPOSAL

Fix – Fix tab order for client data fields

Enhancement – Print menu - version number now shows on all proposal pages

Enhancement – Print menu - select phase and select show buttons now return to correct on print menus

Enhancement – Print menu - fix window sizing when returning from previewing store reports

Enhancement – Proposal product pages align page numbers with proposal numbers

Enhancement – Change orders - fix update global pricing process within change orders

Fix – Fix and improve creating a new proposal starting number.

Enhancement – Sort proposals when entering proposal list.

Fix – Fix status button on proposal detail.

### SETUP

Enhancement – Increase length of header bar field

### POS

Enhancement – Add change date field to setup screens for all invoices. PO's, and service orders

Enhancement – Enlarge logographic image

### PRODUCT SETS

Enhancement – Do not allow entry into product subsets make, description, and price fields

### CONTACT

Fix – Fix test prints of merged letter & fax

### POS 5b

Fix – FIX FINDING WRONG CONTACT FOR INVOICES (Clear Master 1 find invoice & Master 2 find invoice and Set Field (lookup flag L) from Create Sales Invoice, Quotation, P.O., and Service Order) Set Starting (Invoice Number ) to 1000 in Definitions.

Windows 5.0 v5b toggle max then toggle zoom.

## Version 5.0v4b

### PRODUCT

Fix – Fix product detail return to correct product list with nav. Globals

1. Rearrange department fields to have make be first tabbed field

## POS

Enhancement – Make invoice screens return to normal size when clicking done button

Enhancement – Make invoice dock list fields non entry formatted

## CONTACT

Fix – Fix new contact “find bar first char” and “primary contact” field by deselecting “do not evaluate...”

## Version 5.0v4

## GENERAL

Enhancement – Make screen size standard width and zoom to largest vertical screen size

## PROPOSAL

Enhancement – Add “make-model-cat-description” pull down field

Enhancement – Add model field into product detail list for easy lookup

Fix – Fix product phase status lookup

Enhancement – Change bid locator label to bid number

Enhancement – Add modified date to client and tracker

Enhancement – Change creation date & modified date to editing fields

Enhancement – Add raw cost in p.o.’s & p.o. summary

Fix – Fix screen refresh on all pick text returns

Fix – Fix product text on product summary printouts (yes/no)

Fix – Fix tax adjust field by adding status “t” to 1st record

Fix – Fix total system price by rounding amounts

Fix – Fix “cancel” on add proposal templates message

Enhancement – Improve P.O. to accept 2 line descriptions

Enhancement – Consolidate print preview menu’s into print menu’s

Enhancement – Add payment terms pull down menus

Enhancement – Add a - in proposal numbers 5609-00 to show duplicates

Enhancement – Add pricing report from the proposal pricing screen

Fix – Fix selling price gp% display in product detail list

Enhancement – Increase product text area in printed proposal

Fix – Fix “make sku category” print without “ - - ” when no sku exists

Enhancement – Add payments and credits and balance due to reconciliation/invoice

Enhancement – Move print preview buttons to single reports screen

Fix – Fix tracker insert date into notes field.

Enhancement – Add warranty and onsite fields to other default screen

Enhancement – Set integrity and contract notes field sizes to the proposal printouts

## P.O.S.

Enhancement – Add “price update” button on quote, invoice, and P.O.

Fix – Fix “find....ok

## PRODUCT

Enhancement – Goto department field when adding a new product and set tab order

## P.O.S.

Enhancement – Change product date to automatically show modify date



## CONTACTS

Enhancement – Add auto date calendar

Fix – Fix serial number addition by new proposals

Enhancement – Sort company and client so empty fields go to bottom

## TASKS

Enhancement – Add auto date calendar

## PFR LETTERS

Fix – Fix pfr letters import without removing letter text

## SETUP

Enhancement – Add payment terms pull down menus

## Version 5.0v3

## PROPOSAL

Fix – Tax problem=adjust sales tax + tax not working, because "t" is not on 1st record.

Goto proposal pricing layout (add) "status tax field and enter "y". Goto scripts and "add new proposal". Add set status tax, "t". Add this to all templates.

Fix – Proposal Calc a penny off. Goto script, subtotal eq sell, add round(number, precision 2)

## Version 5.0v2

## PROPOSAL

Enhancement – Speed up all lists 100%

Enhancement – Put error messages in area & product global delete

Enhancement – Put error message in proposal detail if no areas exist

Enhancement – Change order lock out system

Enhancement – Change orders - add area's to report

Enhancement – Automatic logo production

Enhancement – Active change order system

Enhancement – Put equipment gp% on store summary

Fix – Fix dup area

Enhancement – Product summary report

Enhancement – Version number

Enhancement – Add area placement to proposal product detail list

Fix – Fix tag products delete-stays in found set

Enhancement – Put area total in product detail list on screen

Fix – Fix return to proposal pricing from check prices

Enhancement – Activate modify proposal buttons on proposal detail screen

## TASKS

Enhancement – Put safety error message in view tasks

## CONTACT

Enhancement – Put safety error message in view tasks

Enhancement – Increase id# size

Fix – Fix delete tags

POS

Enhancement – Put safety error message in view tasks

PRODUCTS

Fix – Fix delete tags

PRODUCTS TAGS

Enhancement – Put beeps in

SETS

Enhancement – Add set totals to report

Version 5.0v1b

CONTACT

Fix – Fix task loading

Fix – Fix letter and fax print by creating new print layouts

Cure-goto layouts, click on body part & white

Set page break before each occurrence.

POS

Fix – Fix task loading

PROPOSAL

Fix – Fix task loading-add halt to “goto main menu” script

PRODUCT

Enhancement – Add status field to product lists

Version 5.0

PRODUCT

Enhancement – Add editing value lists for make and category and eliminate mfg.fm and dept. Files.

TEXT

Enhancement – Add alpha finder no find message

Enhancement – Add done button message with no text checked

Enhancement – Add a text-editing screen for each text block

Enhancement – Add a 1” bottom print margin and auto break for printing text.

Version 4.5

Proposal.fm

Enhancement – Return properly from sets to proposal products instead of to change orders.

Enhancement – Add Millivolts and Milliamps to power units

Enhancement – Change Area default text to ..This area includes the following products and features:

Enhancement – Proposal product list; access products by area from line list to detail list

Enhancement – Proposal Line list; add pick product button  
Enhancement – Proposal Detail Line list; Add product and add set buttons  
Enhancement – Make duplicating proposals return to the proposal list  
Enhancement – Allow modification of print menu titles using the EDIT password  
Enhancement – Task button on main logo screen goes to task manager  
Enhancement – Print Menu; Correct Alignment on Area Subtotals

#### P.O.S.

Enhancement – Add Cancel buttons to pick product list  
Enhancement – Add Product sort buttons to all setup screens

#### TASKS

Enhancement – Add a Past and a Tomorrow find Task feature

#### PRODUCTS

Enhancement – Correct Tab order on product detail screens  
Enhancement – Correct return from mfg lookup to detail 1 screen  
Enhancement – Increase department boxes on all price sheets to accept long names

#### PRODUCT SETS

Enhancement – Relabel Subsets to Product Subsets for better clarity

#### UTILITY.fm

Enhancement – This utility will automatically prepare all of your old CPS find for importing into a newer version of the CPS software.

#### TEXT

Enhancement – Automatically number a newly added text block  
Enhancement – Add a view text icon and a editing page with spell check and print

#### LETTEXT

Enhancement – Automatically number a newly added text block  
Enhancement – Add a view text icon and a editing page with spell check and print

#### SPECIAL PRODUCT FILE FIX

Problem when adding a product from proposal detail product list. Then Adding a product in product database. The done button does not return you to the product list.

Fix – Reconnect the done button to the “return to export list modify script” which is located after scripts;

Add a duplicate product

Return to product

Return to export...

\*Return to export list modify script

Then flip to next lower layout “create detail change”

Copy QTY & Field-Add Product and Duplicate Product buttons with text.

Flip up 1 Layout to “Create Detail Modify” and Paste fields and buttons.

Master Windows and Mac versions have been fixed.

#### Proposal.fm

- Enhancement – Allow access to product fields from proposal product detail list
- Fix – Fix start screen text alignment for mac conversion
- Enhancement – Change mark-up item GP on pricing screens
- Enhancement – Change clear button to untag
- Enhancement – Re-tab change order screen
- Enhancement – Clarify instructions on proposal number screen
- Enhancement – Improve add product to line and detail list
- Enhancement – Remove “special terms” text on contract & summary

#### Product.fm

- Enhancement – Change clear button to untag

#### Contact.fm

- Enhancement – Change clear button to untag
- Fix – Fix find on salesman initials

#### Set-Up.fm

- Enhancement – Create access privilege expiration system

#### Sets.fm

- Fix – Fix set sort from change order

### Version 4.4v7

#### Proposal.fm

- Enhancement – Change Logo Screen button layout
- Enhancement – Change Specialist name--remove title case
- Enhancement – Raise Ink jet margins again
  - Correct spelling of “misuse”
- Enhancement – Product text set to 2 Point to stop overprint beyond box
- Enhancement – Start Screen--directly to Logo button
- Print Menu:
  - Enhancement – Add special title pages to Single Reports
  - Enhancement – Remove page number on area subtotal pages
  - Enhancement – Use Edit password for custom area summary reports
- Fix – Fix Proposal Print: Sets. install included--correct page break
- Fix – -Fix suggested bonus amount (reverse)

#### Contact.fm

- Fix – Fix Contact Update P.O.S. ID number
- Enhancement – ID # unique

#### Products.fm

- Enhancement – Change--add button for dual use
- Enhancement – Unique model indicator
  - Fix update company name on print reports menu



Enhancement – Re-tab product detail (mfg field)

Text.fm

Enhancement – ID # unique

POS.fm

Enhancement – Add Need By date

Enhancement – Reference number

Enhancement – New terms

Enhancement – Phone number in address

Enhancement – Update 2nd address with Ship To

Fix – Fix labor extended tax and equipment tax

Fix – Fix P.O update shop address button

Version 4.4v6

Proposal.fm

Enhancement – Pricing Error message

Fix – Fix Mailing Label printout; Sold sticker printout

Enhancement – Add Cancel to Mailing and Sold stickers

Enhancement – Add Cancel to Letter sets; change dates to month, day, year

Enhancement – Change Bid Submittal and Warehouse Pallet to make and model

Enhancement – Correct spelling of “restaurant”

Enhancement – Proposal View next Product arrows

Enhancement – Remove extra cost and list fields from Proposal Products

Enhancement – Letters--add Title pop-up menu

Fix – Fix Misc. parts subtotals on Pricing screen

Enhancement – Add Task button to Logo screen

Enhancement – Add Print Letters button to PFR Modify screen

Contact.fm

Enhancement – Add Address Sort

Products.fm

Enhancement – Sort on list price

Enhancement – New field-- “Unit Power”; watts; volts; amps

Version 4.4v5

Area.fm

Enhancement – Remove Sorts

Enhancement – Find by group

Enhancement – Alpha finder stays in group

Mfg.fm

Enhancement – Remove sorts

Enhancement – Find by group

Enhancement – Alpha finder stays in group

#### Proposal.fm

Fix – Fix 000 Tax When Show tax=no

Fix – Fix Adding Product strategy

Fix – Fixed Multiple client: & Site: labels

Enhancement – Add .00 to Payment Terms

Enhancement – Show full date on Proposal Contract and Summary

Enhancement – Add Custom Print area subtotals

Fix – Fix Custom Print Print sets

Enhancement – Print Product Status from Status screen

Enhancement – Improve Pricing Errors

Fix – Fix Change Order

Fix – Fix Client Info on Detail

#### Product.fm

Enhancement – Remove Product and Set sorts

Enhancement – Redo specs with Watts / Amps

Enhancement – Remove "Model Exists" in Products

Enhancement – Change Departments to Category

#### Contacts & Tasks.fm

Enhancement – Add Staff

Enhancement – Remove Sorts

#### POS.fm

Enhancement – Add Sort Products

### Version 4.4

Enhancement – All New, Easier To Use On-Screen Graphics.

Enhancement – Updated, sleeker-looking Client Proposals.

Enhancement – New Point Of Sale (P.O.S.) Module for quick invoices, quotations, service orders and purchase orders.

Enhancement – New Product Module features Global Pricing, easier to use data entry and new fields.

Enhancement – New Contact Module with "Task Manager" for tracking calls, appointments and things-to-do.

Enhancement – New Tax Calculation section for multiple tax structures including Canadian tax.

Enhancement – New Area List now includes eight Groupings with over 400 areas.

Enhancement – New Manufacturers Listing includes eight Disciplines with over 250 Manufacturers.

Enhancement – New Department List includes over 750 Categories.

Enhancement – New Printed Reports such as Proposal Area Lists, Palette Lists and Submittal Forms.

Enhancement – New and improved User's Guide with easier to follow instructions, better tutorial and illustrations.

Enhancement – Over 100 other new Enhancements.

Version 4.3

Enhancement – Improve the graphical interface of the proposal module.  
Enhancement – Improve the graphical interface of the product module.  
Enhancement – Condense salesman's initials for better printing.  
Enhancement – Add the Edit password to all files for modifying layouts.  
Fix – Fix Job Site Phone Numbers on Summaries & Contracts.  
Fix – Fix payment terms printout when discount is 0%.  
Enhancement – Remove blank Phone titles from Summary pages.  
Enhancement – Rearrange Proposal page headers and remove logo's.  
Enhancement – Change Programming Password.  
Enhancement – Remove Template proposals from Tracker list.  
Enhancement – Add proposal creation date to Tracker List.  
Enhancement – Change Phase Status Indicator from 0 to ALL.  
Enhancement – Remove Area change button from proposal detail.  
Enhancement – Improve Phase display on Client Proposals.  
Enhancement – Improve Phase display on Confidential Summaries.  
Enhancement – Improve Phase display on Product Status & P.O.'s.  
Enhancement – Add a separate spell checker button to text screens.  
Enhancement – Add System Design field to Modify System Design Text.

#### Proposal File

Fix – Fix zone 21 in value list

#### MODIFY PRODUCT LIST

Enhancement – Add detail carrot. Change colors.

#### PROPOSAL DETAIL

Enhancement – Add goto tracker button

Enhancement – Change screen fonts to geneva 10 on all lists

#### MAIN PRODUCT DETAIL

Enhancement – Add goto proposal detail button.

#### Sets File

Fix – FIX ALPHABET BAR

Enhancement – Finds set by first character of name

Fix – Add detail carrot.



#### Enhancement – Add Salutation to Client Name

Enhancement – Salutations (Mr., Mrs. etc.) can now be used in proposals and contacts. Using a salutation in the clients name automatically includes it in the printed proposals, follow up letters and mailing labels.

#### Enhancement – Add a Modify Phase Status Screen

A new screen is now used for setting the phase for each area and product. Leaving this screen automatically allows you to select which Proposal Phases to show.

#### Enhancement – Improve Proposal Detail Screen

The layout of Area's and Products on this screen now closely resembles the look of a printed proposal. Direct access to setting phases has been added. The total price of each product now reflects any global pricing adjustments that have been made.

#### Enhancement – Improve Modify Area's Screen

Direct access to Text lookups is now possible with the addition of a Text ID field for each area.

#### Enhancement – Improve Modify Products Screen

Direct access to Product lookups is now possible with the addition of a Model lookup field for each product.

#### Enhancement – Improve Delete Records Buttons

All DELETE buttons now have a built in safety system that prevents accidentally deleting other proposal records.

#### Other Enhancements

Enhancement – Add employee title to contacts in contact module.

Enhancement – Add user Edit capability to Letters.fm module.

Enhancement – Add new user password. "CPS" (Horizon & CPS).

Enhancement – Add plate & grill style update in summary.

Enhancement – Add Store Set Up defaults report.

Enhancement – Adjust mailing label alignment in contact module.

Enhancement – Adjust mailing label alignment in proposal module.

Enhancement – Adjust sold sticker alignment in contact module.

Enhancement – Automatically select flagged contacts when leaving "Select Contacts" screen in contact module.

Enhancement – Expand product finishes selection.

Fix – Fix button number 1 "Save Proposals" file name when setting new proposal starting number.

Fix – Fix DUPAREA date error message

Fix – Fix shop phone error in Bonus Bucks.

Fix – Fix Specialist Labor cost.

Fix – Fix Text Worksheet print button  
Fix – Fix TIMELINE date error message  
Enhancement – Improve Change Order product placement code.  
Enhancement – Improve Equipment GP% calculation accuracy.  
Enhancement – Improve MFG & Dept Reports button.  
Enhancement – Improve Pricing Errors Calculation accuracy.  
Enhancement – Improve print merge (closing) in Contact module.  
Enhancement – Improve proposal duplication accuracy.  
Enhancement – Improve System Discount calculation accuracy.  
Fix – Remove Labor % of equipment calculation.

Enhancement – Improve these Printed Reports;  
Enhancement – Confidential Price List - Remove header (1004)  
Enhancement – Product Reports - Capitalize all product fields. Sort MFG reports by make and then model.  
Enhancement – Purchase Orders - Fix manufacturer groupings.  
Enhancement – Purchase Orders - Fix manufacturer groupings.  
Enhancement – Reconciliation - Remove page breaks between area's.  
Enhancement – Store Price list - Remove page breaks between area's.  
Enhancement – Work order - Remove page breaks between area's.  
Add Installer notes after each area.

Enhancement – Add cancel button to select contacts in contact module.  
Enhancement – Add CPS password to Timeline.fm.  
Enhancement – Add "Delete with Flags" to product module.  
Enhancement – Change tracking report separator lines to solid lines.  
Enhancement – Expand "Model Already Exits" field in product module.  
Fix – Fix Tracker Sort & Tab from Last name to Company.  
Enhancement – Goto modify Follow-Up Letters from main menu.  
Enhancement – Improve field tab in summary.  
Enhancement – Improve Price List report by adding total cost & unit labor.  
Enhancement – Improve product phase select screen.  
Enhancement – Improve product placement on proposal product screen.  
Enhancement – Improve window management in DOS.  
Enhancement – Standardize cover text headings on screens & forms.

#### Enhancement – Add Product Placement Codes

This feature enables you to assign a placement code to each product in a proposal. This placement code determines the order that products appear in each area. Sort order is first by placement code, manufacturer and finally by model number.

#### Enhancement – Add Duplicate Area capability

This feature enables you to duplicate any area in a proposal. All of the products in an area can be duplicated and a new area name and zone can be assigned to as many duplicates as desired.

#### Enhancement – Add Change Equipment Prices

This feature enables you to automatically set or change the prices of all of the products in a proposal. You first select between "Cost Plus" or "Margin" or "Adjust Selling Price". Then you type in the % value. The

program resets all of the products to the percentage that you specify. You can always return to the original price if you wish.

Enhancement – Add Delete Extra Area's capability

Enhancement – Extra area's that are unused in proposal templates can now be deleted all at once instead of 1 area at a time.

Enhancement – Improve main product module screen.

This screen has been modified to simplify creating and modifying products. Pricing errors are now easier to identify and more product details can be changed from the product list.

Enhancement – Add Letter Text file

Contact letters can now be created and saved in a new file. Merged letters can then be easily created by importing these letters into the contact module.

Enhancement – Add Custom Proposal Page Breaks

Custom proposals are now preset to print proposal areas consecutively instead of one area per page. Logo's are now included on these layouts and a print custom sets screen has been added. These layouts can be printed "as is" or can be customized to suit your needs.

Other Enhancements

Enhancement – Improve Proposal detail screen.

Enhancement – Improve Status screen.

Enhancement – Improve Modify Area screen.

Enhancement – Improve Modify Product screen.

Enhancement – Change "Install workmanship guaranteed for 1 year "to

"Installation workmanship is fully guaranteed".

Enhancement – Add "closing" (Sincerely etc.) selection to contact letters.

Enhancement – Add product finish to product descriptions on printed proposals.

Enhancement – Add Trade Notice and Referral Bonus to Follow-Up letters in Proposal Tracker.

Enhancement – Change "Pick" button to "Done" button on product, text and set modules.

Enhancement – Change "Search" button to "Search For" button on all screens.

Enhancement – Change follow up letters salutations from full name to first name.

Enhancement – Sort product pricing list by manufacturer instead of area.

Enhancement – Remove totaled line on System Design page in printed proposals.

Enhancement – Increase the length of address fields on reports

Enhancement – Add reset phase button in product status screen

Enhancement – Add zone field to modify product screen

Fix – Fixed set phase sequence.

Fix – Fix proposal description updating in proposal summary.



Fix – Fix date formatting in notes field in contact module.

Fix – Fix Text file "add text" bug

Fix – Fix Windows - Area Name Pop Up Menu

Fix – Fix parts & services cost pricing

Fix – Fix Area text clear before pick text

## Version 4.0

Enhancement – Auto size all windows for full monitor.

Enhancement – All windows now occupy your full monitor screen. The windows are designed for a standard 14" monitor which allows for a more readable screen. Buttons are now arranged for easier use. The CPS

program still automatically sizes itself for smaller portable computer screens. Windows in DOS no longer duck underneath each other.

#### Enhancement – Customized Reports Generated.

You can now create custom client proposals with your own distinctive look. In addition to the 10 premade proposal styles, you have 10 more templates where you can arrange layout designs, fields and fonts to suit your business style.

#### Enhancement – New proposal starting number system added.

You can now change the starting number for new proposals. This enables you to have several CPS programs on different computers each with a different series of proposal numbers. This allows you to easily identify who's system a proposal was made on and still merge the proposals together.

#### Enhancement – Placement Codes added to areas/zones.

This feature enables you to assign a placement code to each area/zone of the proposal. This placement code determines the order that areas/zones appear in your proposals. Sort order is first by placement code, then zone, area, manufacturer and finally by model number.

#### Enhancement – Increased Payment Terms to 5 Plans.

You now can choose one of 5 payment plans that will automatically set the payment amounts and terms for your client. One of these is a single payment term with a discount defined by you. The special payment terms area has been expanded for a more detailed description.

#### Enhancement – Separate labor rate for sales & installers.

A different labor rate for sales specialists can now be used in addition to the standard labor rate for installers.

#### Enhancement – Added a Timeline report to Project Tracker.

This report lists all the installation phases for all of your proposals chronologically. It is now very easy to see which phase of the installation is coming up next so that manpower and products can be allocated efficiently. The project tracker itself has been enhanced to specify phase descriptions and is easier to use.

#### Enhancement – Enhanced Detail & Product Prices window.

This new screen enables you to view all of the pricing details for all of the products in a proposal. You can now easily check and change all pricing costs, GP%, install labor and quantities from one screen. It will even alert you if your selling price is less than your cost for each product.

#### Enhancement – Enhanced Proposal Set-Up window.

This enhancement enables you to change all of the set-up settings for each proposal. Payment terms, labor rates, warranty terms, show print selections and cover/contract text can all be easily changed for any proposal.

#### Enhancement – Enhanced Proposal Detail window

This key window has been modified to be much easier to read and use and is the primary screen from which all proposal details can be viewed, modified and printed.

#### Enhancement – Enhanced Contacts module.

The contact module has undergone a major enhancement. You now can flag individual contacts and group contacts by category for print merging. Another new feature is the ability to set a primary name, address and phone number for each contact. This makes merged letters, and reports easier to use and look-ups much more efficient. A Country field and the ability to add a 2nd address line to each contact has also been added.

A date and time stamp has been added to the notes field to mark communications with your client for future reference.

Enhancement – Added a Compound Tax rate.

Those states and countries that require a tax on a tax can now create a default setting to provide a compound tax rate.

Enhancement – Proposal report margins for book binding.

Printed client proposal layouts have been moved to the right to allow for a 3/4 inch left margin for binding your proposals if you wish.

Enhancement – Helvetica and Time fonts exclusively.

We have used only 2 type styles in version 4.0. This not only provides for more compatibility with standard systems fonts for both Windows and Macs but speeds the printing of most reports and proposals. You can still modify your proposal with your own favorite type styles by using the custom reports.

Enhancement – Changed Auto to Pick product/text.

We've changed the terminology used for bringing text and products into your proposals. Auto text/product buttons now say "Pick Product" and "Pick Text" for ease of understanding.

Enhancement – 50% faster opening of the CPS program.

Enhancement – 25% faster duplication of proposals .

Enhancement – Added a file OPEN\_CPS.fm that opens the CPS program.

Enhancement – Added a Title Page to the Client reports.

Enhancement – Added a print Status Report button to the status window.

Enhancement – Added go direct to status and tracker windows from main.

Enhancement – Added lookup for mfg. and depts. ID's in product module.

Enhancement – Added a unique product indicator to product module.

Enhancement – Added duplicate product button to product module.

Enhancement – Added lookup Mfg. and Dept ID's to product module.

Enhancement – Added delete all products button in the product module.