

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	
Other Defaults 8							Next	Done
POS								
<input checked="" type="checkbox"/> Convert Quote to Invoice: Keep current Quote Number								
Acceptance Form								
Under Logo/Address								

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 checked="" type="radio"/>	Mobile: 323.687.1609
<input type="radio"/>		<input type="radio"/>	Pager:
<input type="radio"/>	City: State: Zip: Country:	<input checked="" type="radio"/>	Fax 1:
		<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.

<p>Company Name: <input type="text" value="1"/></p> <p>Address: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text"/> Zip: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>Fax: <input type="text"/></p> <p>Permit # <input type="text"/></p> <p><input type="button" value="Switch Company"/></p>	<p>CPS Expiration Date: 2/18/2024</p> <p>GraphicsDraw! Access enabled</p> <hr/> <p>Purchasing Ship To: Warehouse Address</p> <p>Address: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text"/> Zip: <input type="text"/></p> <p>Buyer: <input type="text"/></p>
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RATES	SERVICES	PRINT
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<p><u>Hourly</u> <u>Cost</u> <u>Sell</u> <u>List</u></p> <p>Install Labor: <input type="text" value="\$1"/> <input type="text" value="\$1"/> <input type="text" value="\$1"/></p> <p>Misc Parts Charge: <input type="text" value="5%"/> of Equip <input type="text"/> of Labor</p> <p>A Tax Rates B</p> <p><input checked="" type="radio"/> 1 <input type="text" value="5.000%"/> <input type="text" value="Installed"/> <input type="text" value="0.000%"/></p> <p><input type="radio"/> 2 <input type="text" value="0.000%"/> <input type="text" value="Added....."/> <input type="text" value="0.000%"/></p> <p><input type="radio"/> 3 <input type="text" value="0.000%"/> <input type="text" value="Compound"/> <input type="text" value="0.000%"/></p> <p><input type="text" value="YES"/> Tax Labor <input type="text" value="YES"/> Tax Misc Parts Tax Help ?</p> <p><input type="checkbox"/> Tax 2 AB Override Option</p> <p><small>Taxed items (T) = Tax A on the Sell price and Tax B will be 0</small></p> <p><small>Installed items (I) = Tax A will be 0 and Tax B will be on the Cost</small></p>	<p>Extra Warranty? <input type="radio"/> YES <input checked="" type="radio"/> NO</p> <p>Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO</p> <p><input type="text" value="4%"/> of Equip</p> <p>On-Site Service? <input type="radio"/> YES <input checked="" type="radio"/> NO</p> <p>Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO</p> <p><input type="text" value="2%"/> of Equip</p> <p>Tax Services <input type="radio"/> YES <input type="radio"/> NO</p> <p>Services are Added to Misc Parts</p> <p>Suggested Referral Bonus <input type="text" value="5.0%"/></p> <p>Charge Client? <input type="radio"/> YES <input checked="" type="radio"/> NO</p>	<p>Show List Prices?</p> <p><input type="radio"/> Show list prices and discount</p> <p><input checked="" type="radio"/> Do <u>not</u> show list prices</p> <p>Charge & Show Tax? <input checked="" type="radio"/> YES <input type="radio"/> NO</p> <p>Show Product Text? <input type="text" value="Product"/></p> <p>Prices Guaranteed For: <input type="text" value="30"/> Days</p> <p>Prices Quoted Are: <input checked="" type="radio"/> ESTIMATED <input type="radio"/> GUARANTEED</p> <p>Show Product Listing</p> <p><input type="text" value="A Make-Model-Cat-Desc-Fin"/></p>
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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								
<p>Run CPS in Secure Mode</p> <p>Enable FileMaker Menus</p>		<p>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.</p> <p>Please note: In order for this feature to work it is necessary to</p> <ol style="list-style-type: none"> 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:

Address:

City:

State: Zip:

Phone:

Fax:

Purchasing Ship To: Warehouse Address

Address:

City:

State: Zip:

Buyer:



Permit #

Hourly	Cost	Sell	List
Install Labor:	\$50	\$90	\$100

EME Audio

2

Name:

Address:

City:

State: Zip:

Phone:

Fax:

Purchasing Ship To

Address:

City:

State: Zip:

Buyer:

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 Electroni
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

Add Area	Pick Sets	Change Order Product		Done
Add Product	Pick Products	Judy Hardin-Gideon		
Add product to Product Library	Pick	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"/>		
<input type="button" value="Spell"/>				
Unit: <input type="text"/>	Cost: <input type="text"/>	GP%: 0.0%	W/ADJUST	
Sell: <input type="text"/>	<input type="button" value="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 S: <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"/>		
Change Order Text: <input type="text"/>				
Modify Product Cost Password: <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- Add View	---Areas--- Dup Del	Zone	Area	Area Text	System Design	Scope of Work
<input type="button" value="Add"/>	<input type="button" value="Del"/>	1 n	MASTER BEDROOM	This area includes the following products and features:		
<input type="button" value="Add"/>	<input type="button" value="Del"/>	2 n	MASTER BATH	This area includes the following products and features:		
<input type="button" value="Add"/>	<input type="button" value="Del"/>	3 n	BEDROOM 2	This area includes the following products and features:		
<input type="button" value="Add"/>	<input type="button" value="Del"/>	4 n	BEDROOM 3	This area includes the following products and features:		
<input type="button" value="Add"/>	<input type="button" value="Del"/>	5 n	GUEST BATHROOM	This area includes the following products and features:		
<input type="button" value="Add"/>	<input type="button" value="Del"/>	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				Delete Blank - - Products	Add Area	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: \$40,503.65		Install: \$9,642.00	Misc Parts: \$2,255.19		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	XANTEC	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	

Main Print Menu
EME Audio & Video Systems
Dr. Conlee
Electronic Systems
PROPOSAL: 1659-01 v1

Done

Custom Proposals

Dealer Proposals

Selected Phase
All Phases

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

A Make-Model-Cat-Desc-Fin

Prices Guaranteed
From: 2-15-24
For: 30 Days
Until: 3-16-24
Proposal Date: 2/15/24

Creation Date

Printer Setup

Show Print Dialog

PDF Software

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

No Breaks

- Work Order
- Work Order (Detail)
- Work Order (Special)
- Install Sales Invoice
- Project Sales Invoice
- Blank Change Order
- Blank Quality Control

- Mailing Labels
- Project Reconciliation

Client Proposals Done

Product & Install Prices Separate
Entire Proposal

Proposal Sections

view print

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

Product & Install Prices Combined
Entire Proposal

Proposal Sections

view print

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

Additional Proposal Sections

view print

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

Delete Blank - - Products

Reset Payment Amounts

Proposal: Pick Products: Clear Product Qty

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	Product Library																									Done with Qty		
Show Picked	MAIN BEDROOM																									Cancel		
	Clear Picked Qty	click on View button for Details																										
Pick	Make	Model	Pkg Category	Description	OnHand	Price	View	Fav																				
<input type="checkbox"/>	B&W	ASW610	SPEAKER - SUBWOOFER -		650.00 ea		<input type="checkbox"/>	<input type="checkbox"/>																				
<input type="checkbox"/>	B&W	CWM663	SPEAKER - IN-WALL SPEAKER -		750.00 pr		<input type="checkbox"/>	<input type="checkbox"/>																				

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	Prod Text
Y	Y	Y	Y	Y	Y	Y	Y		
Subtract Products		Show All Sort #		P=Proposed C=Changed A=Added D=Deleted				Unit Sell	Ext Sell
	Zone Area	CO#	Class	Qty	Make	Model	Category-Description		
	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

- 0 Cash On Delivery
- 1 Payment Charge
- 2 Payment Plan
- 3 Payment Plan
- 4 Payment Plan
- 5 Payment Plan
- 6 Special Terms

PAYMENT PLANS

50% Deposit due upon acceptance
 40% Payment due before finish phase
 10% Payment due upon completion

Reset Payment Amounts

	4,993.40
	3,994.76
	998.74
Sub Total:	9,725.38
Tax:	261.52
Grand Total:	9,986.90

Use normal style text & do not exceed this text block.

RATES

Hourly	Cost	Sell	List
Install Labor:	30.00	60.00	60.00

Misc Parts Charge: % Equip
 % 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%

Tax Labor Tax Help ?
 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

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

PRINT

Show List Prices?

- Show list prices and discount
- Do not show list prices

Charge & Show Tax? YES NO

Show Product Text?

Prices Guaranteed For: Days

Prices Quoted Are: ESTIMATED
 GUARANTEED

Show Product Listing

Payment Amounts have been Reset

Main Print Menu

EME Audio & Video Systems

Dr. Khika

Home Electronic Systems

PROPOSAL: 1578-00

Done

Custom Proposals

Dealer Proposals

Selected Phase
All Phases

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

A Make-Model-Cat-Desc-Fin

Prices Guaranteed

From: 11-11-21

For: 31 Days

Until: 12-12-21

Proposal Date: 11/11/21

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

No Breaks

- Work Order
- Work Order (Detail)
- Work Order (Special)
- Install Sales Invoice
- Project Sales Invoice
- Blank Change Order
- Blank Quality Control

- Mailing Labels
- Project Reconciliation

Client Proposals

1st Draft

Product & Install Prices Separate
Entire Proposal

Proposal Sections

view print

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

Product & Install Prices Combined
Entire Proposal

Proposal Sections

view print

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

Additional Proposal Sections

view print

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

Reset Payment Amounts

Show Proposal Total Amount on Cover page

Export Project Sales Invoice to Excel

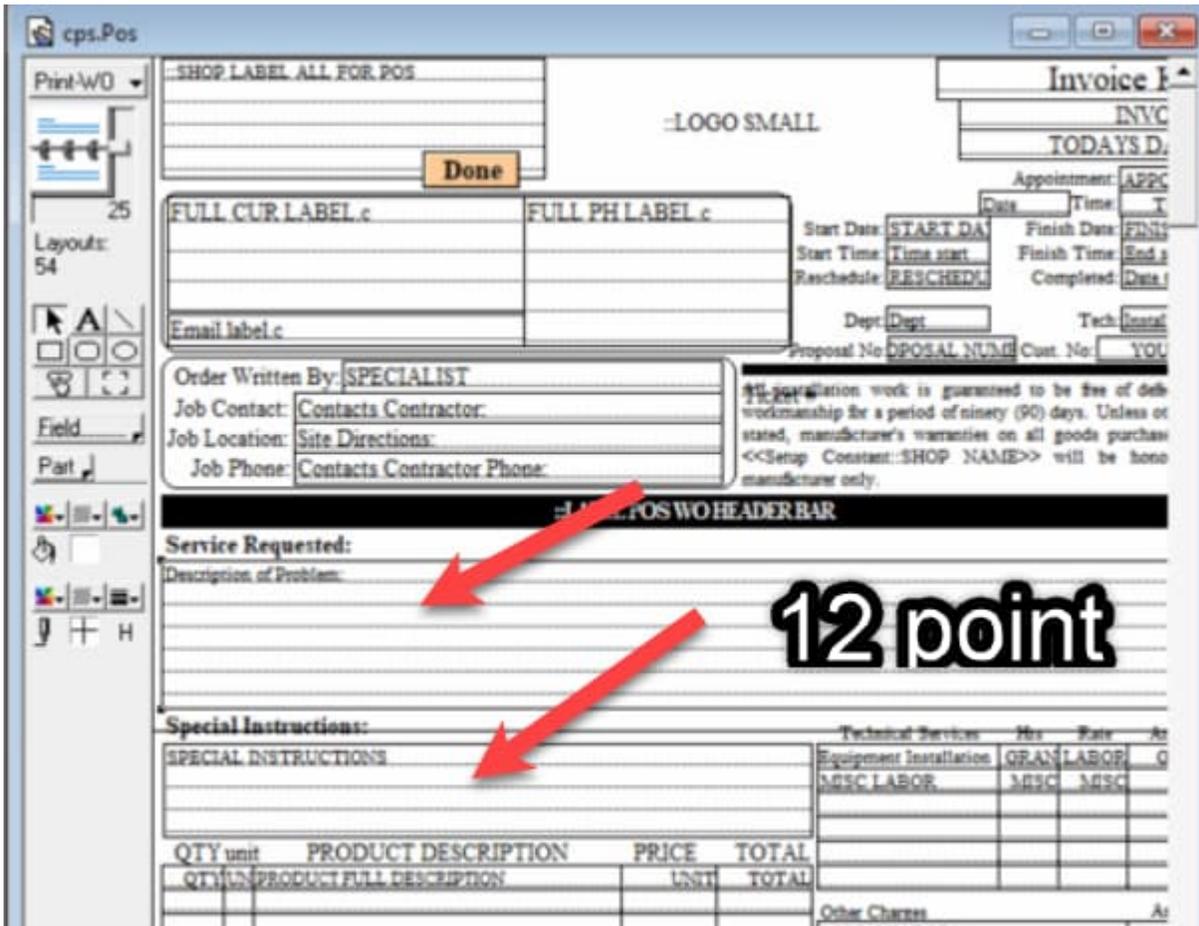
Payment Amounts have been Reset

Project/Work Orders & Invoices: Fix Numbering

Preview Work Order	Print and Post	Work Order Detail			Post WO No Print	Done
First Name	Judy	Modify Work Order Create POS Work Request	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	<input type="text"/>	Actual Start Date	<input type="text"/>	Reschedule	<input type="checkbox"/>	<input type="text"/>
Appointment Date	<input type="text"/>	Actual Start Time	<input type="text"/>	Shop Dept		<input type="text"/>
Appointment Time	<input type="text"/>	Actual Stop Time	<input type="text"/>	Installer		<input type="text"/>
		Actual Stop Date	<input type="text"/>	WO written by		<input type="text"/>
Instructions	<input type="text"/>					
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	Modify Invoice	Invoice	1005		
Last Name	Hardin-Gideon		Proposal	165600		
Address	172 South Sycamore	Payment Method	<input type="text"/>	Invoice Date	11/12/2021	
City	Los Angeles	Credit Card Type	<input type="text"/>	Posted Date	11/12/2021	
State Zip	CA 90036	Credit Card Expire	<input type="text"/>	Export Date	<input type="text"/>	
Home Phone	(323) 931-1511	Credit Card Number	<input type="text"/>			
Work Phone	(310) 306-2066					
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



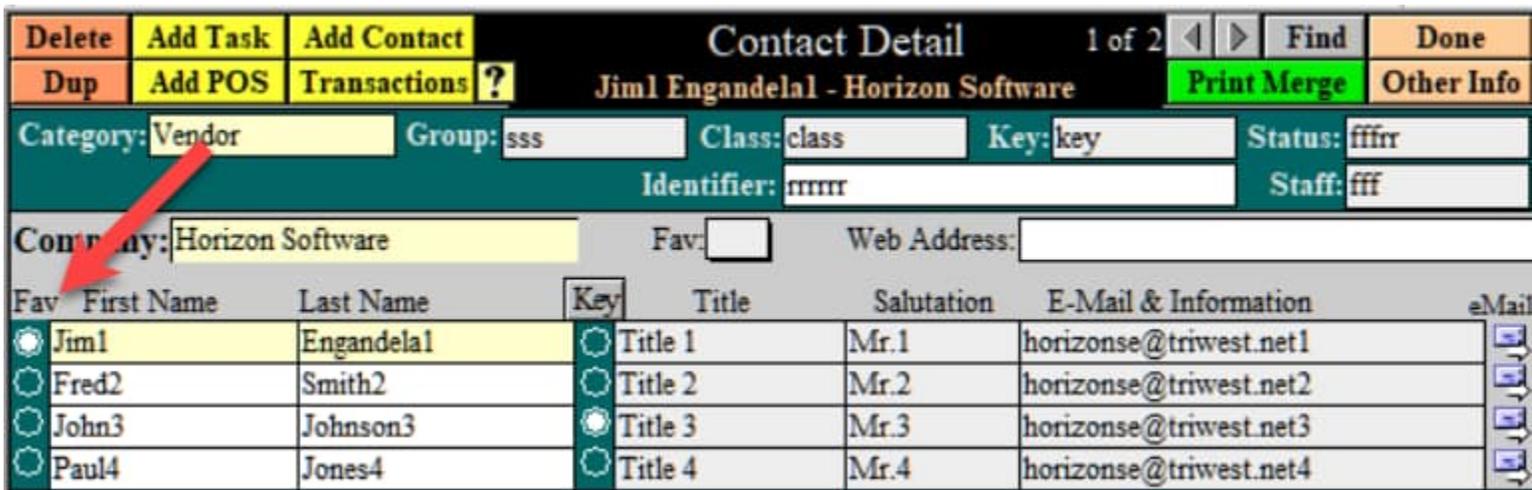
Version CPS 9.1v5

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



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									
	Engandela1, Jim1	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	WORK ORDER	PURCHASE ORDER
Credit Memo		
ACCEPTANCE FORM	WORK REQUEST	

Project Work Order Done button now returns to Project properly.

Zone-Area	Make Model	Action Flag	Product Installed	To Install 31 Products Sold	Work Order Installed Left	Labor Sold -Used Hours Left Labor 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.

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 Exit
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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 8 POS Settings
----------------------------------	---------------------	--------------------------------	-----------------------------------	------------------------------------	----------------------------------	---------------------	-------------------------------

Replace Fields with Default Text Example Shown Below **Other Defaults 3** Please stay within field borders ? Next Done

Proposal - System Design Text

NO SYSTEM TEXT **DEFAULT SYSTEM TEXT**
This proposal represents a design carefully prepared with your requirements,
our experience and industry standards all balanced to form a workable plan.

OPTIONAL SYSTEM TEXT

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.

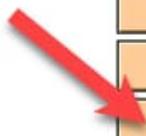
Improve both screen GUI for better clarity

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



Help

HORIZON SOFTWARE

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Exit

Proposal Text	Payment Terms	Other Defaults ?	Master Set-Up Please use normal style text	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 enabled Purchasing Ship To: Warehouse Address Address: 414 W Ridgemont City: Strum State: WI Zip: 54770 Buyer: Jim Engandela			
<input type="button" value="Switch Company"/>						



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
<p style="text-align: center;">CPS System Settings</p>							



Replace Fields
with Default Text

Other Defaults 2

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

	<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

Automatically Add these Labor Items to Other Labor 5 & 6

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

Cost & List will auto calc if empty

Products

Selected Phase
All Phases

Adjust All Product Prices
 ORIGINAL PRICES % **Update**
 Adjust All Product Costs % **Update**

Adjust Select Products
Reset Costs

44.4% GP
\$339.95

Labor

Update

Other Labor Description	Hourly Sell Rate	Labor Hours	% of Prod Lab	Labor \$ Amount	Total
Installation	\$100.00	4.0			\$400.00
Engineering	\$200.00	2.0			\$400.00
Travel	\$300.00	2.0			\$600.00
Training	\$400.00				\$0.00
Project Management	\$500.00			\$150.00	\$150.00
Prep & Travel Time	\$600.00	2.0			\$1,200.00
Seven	\$700.00				\$0.00
Eight	\$800.00		15.0%		\$52.50
Nine	\$900.00				\$0.00
Ten	\$1000.00			\$576.00	\$576.00
Eleven	\$1100.00				\$0.00
Twelve	\$1200.00				\$0.00

Zero Product Hours

Product Labor: 5.0 \$350.00
 Difficulty Factor

Project Management Amount to Labor 5
 Add Prep & Travel Time to Labor 6

← Other Labor: 10.0 \$3,378.50
 Adjust Labor:
 Installation: 15.0 \$3,728.50

Misc Parts

Suggested Referral Bonus
 % of Equip \$17.00
 % of Total \$204.27
 Change Parts Label: YES NO

Parts & Materials: 0.00 + -
 Referral Bonus: 0.00
 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

Update

	Cost	Profit	System Price	GP	Products & Install:
Products:	189.08	150.87	339.95	44.4%	System Price
Installation:	2,662.25	901.52	3,728.50	28.1%	4,068.45
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) \$81.71		Grand Total:	\$4,272.73		Tax B
					Adjust Tax: <input type="text"/> 0.00

Main Print Menu
 EME Audio & Video Systems
 Jim Engandela
 Horizon Software
 PROPOSAL: 1011-00

Done

Custom Proposals

Dealer Proposals

Selected Phase
 All Phases

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

A Make-Model-Cat-Desc-Fin

Prices Guaranteed
 From: 2-19-21
 For: 30 Days
 Until: 3-21-21

Proposal Date
 2/19/21

Creation Date

Printer Setup

Show Print Dialog

Free PDF App

Store Reports

View Print

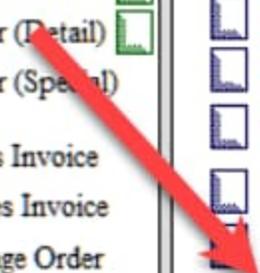
- Project Job Costing
- Products @ Cost
- Products @ Cost-Dept
- Products by Phase
- Product Summary
- Product Status
- Product Specs
- P.O.'s
- P.O. Summary
- P.O. - CO Summary
- Bid Submittal Cost
- Warehouse Pallet
- Product Sold Stickers
- Work Order No Breaks
- Work Order (Detail)
- Work Order (Special)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

Client Proposals Done

- Product & Install Prices Separate**
Entire Proposal
-
- Proposal Sections
- view print
- CPS Cover Page
 - Areas & Products
 - Product Summary
 - Area Summary
 - Project Info
 - Contract

- Product & Install Prices Combined**
Entire Proposal
-
- Proposal Sections
- view print
- CPS Cover Page
 - Areas & Products
 - Product Summary
 - Area Summary
 - Project
 - Contract

- Additional Proposal Sections
- view print
- Letterhead Cover Page
 - Area/Product Prices - No Area Text
 - Area Summary with tax w/Parts Labor
 - Extra Text Editable Extra
 - Extra Contract
 - Technical Services (Labor)
 - Follow-Up Letters
 - Scope of Work



Replace Fields
with Default Text

Other Defaults 2

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
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Ten	\$100.00	\$1000.00	\$1010.00
Eleven	\$110.00	\$1100.00	\$1011.00
Twelve	\$120.00	\$1200.00	\$1012.00

Automatically Add
these Labor Items
to Other Labor 5 & 6

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

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																					
<input checked="" type="checkbox"/>	ALTRONIX	ALT-ALTV248UL			CCTV POWER SUPPLY, 8 FUSED OUTPUTS,	128.44 ea	<input type="checkbox"/>																					
<input checked="" type="checkbox"/>	ALTRONIX	ALT-SAV182D			CCTV POWER SUPPLY, 18 PTC CLASS 2	266.67 ea	<input type="checkbox"/>																					
<input checked="" type="checkbox"/>	ALTRONIX	ALT-SAV4D			CCTV POWER SUPPLY, 4 PTC CLASS 2	111.11 ea	<input type="checkbox"/>																					

Import
Export

Product Utility

8 of 8

Done

Scroll down to view field definitions.

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
-------------------------------	----------------------------	-----------------------------	--------------------------------	----------------------------------	-------------------------------	-----------------------------------	----------------------------

Other Defaults 7   

Global Proposal Contract & POS Invoice Text Line

This text is global to all Existing & New Propsoal Contracts and POS Quotes, Sales Invoices

Proposal Report Options

 Warehouse Pallet Report - Show SKU number instead of Phase

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

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Sub Total:	52,663.54	52,545.78
Tax:	2,184.74	
Grand Total:	54,848.28	

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

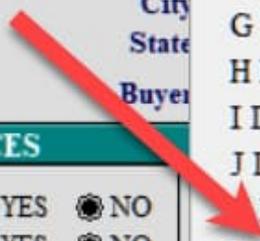
Master Set-Up
Please use normal style text

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

Switch Company

CPS
 Purchase
 Address
 City
 State
 Buyer

- 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



RATES

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	5.000%	Installed	
<input type="radio"/> 2	0.000%	Added.....	0.000%
<input type="radio"/> 3	0.000%	Compound	0.000%
<input type="checkbox"/> YES	Tax Labor	Tax Help ?	
<input type="checkbox"/> YES	Tax Misc Parts		
<input type="checkbox"/>	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

SERVICES

Extra Warranty? YES NO
Charge Client? YES NO
 4% of Equip

On-Site Service? YES NO
Charge Client? YES NO
 2% of Equip

Tax Services YES NO
 Services are Added to Misc Parts

Suggested Referral Bonus: 5.0%
Charge Client? YES NO

A Make-Model-Cat-Desc-Fin

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		Sold		Done		Products: \$43,694.80		Install: \$3,184.00																															
All Phases		<input type="checkbox"/>		<input type="checkbox"/>		HP: \$384.50		Hours: 55.0																															
						Misc: \$5,784.74		Subtotal: \$52,663.54																															
						GP: 39.7%		Grand Total: \$54,848.28																															
<p>SYSTEM DESIGN This proposal represents a design carefully prepared with your requirements,</p> <p>DEN This proposal represents a design carefully prepared with your requirements, our</p> <table border="0"> <tr> <td>1 ea</td> <td>MOVING-COIL CARTRIDGE - ARKIV</td> <td>2,200.00</td> </tr> <tr> <td>1 ea</td> <td>- EKOS BLACK</td> <td>2,695.00</td> </tr> <tr> <td>1 ea</td> <td>REMOTE CONTROL CD PLAYER - IKEMI BLACK</td> <td>3,595.00</td> </tr> <tr> <td>4 m</td> <td>TRI-WIRE SPEAKER CABLE/METRE - K600 CABLE</td> <td>136.00</td> </tr> <tr> <td>1 pr</td> <td>CHERRY/ROSEWALD (INC. ACTIV CARDS - KEILIDH AKTIV (3-WAY) -</td> <td>2,020.00</td> </tr> <tr> <td>1 ea</td> <td>REMOTE CONTROL PREAMPLIFIER - KOLEKTOR BLACK</td> <td>990.00</td> </tr> <tr> <td>1 ea</td> <td>POWER SUPPLY 33/45 RPM - LINGO BLACK</td> <td>1,550.00</td> </tr> <tr> <td>1 ea</td> <td>DIRECT COUPLED PRECISION PHONO PREAMPLIFIER - LINTO BLACK</td> <td>1,600.00</td> </tr> <tr> <td>3 ea</td> <td>STEREO POWER AMPLIFIER - LK 85 BLACK</td> <td>2,685.00</td> </tr> <tr> <td>4 pr</td> <td>RCA INTERCONNECTS 1.2M - SILVER INTERCONNECT CABLES SILVER</td> <td>1,200.00</td> </tr> </table>										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	4 m	TRI-WIRE SPEAKER CABLE/METRE - K600 CABLE	136.00	1 pr	CHERRY/ROSEWALD (INC. 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
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Proposal: Increase Product Features Field Size

**Jim Engandela - Horizon Software
Custom Audio & Video System**

Proposal: 1001-00

1/28/2021 Section: 2 Page: 1

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/ROSENUOT (INC. AKTIV CARDS - KEILIDH AKTIV (3-WAY) - CHERRY/ROSENUOT CHERRY OR ROSENUOT
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:			Tax: <input type="checkbox"/> T
1	Model:	IKEMI		SKU#:			No Labor Tax <input type="checkbox"/>
	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:			Phase: <input type="checkbox"/> 0
							Placement: <input type="checkbox"/> 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

<p align="center">Value List Storage Save your Value Lists and Copy/Paste them after Upgrading</p> <p>PROJECT DESCRIPT: Custom Audio & Video System PROJECT MGR: <input type="text"/></p> <p>SALESMAN: Warren Petryk BID NUMBER: <input type="text"/></p> <p>TITLE: Audio & Video Specialist</p>						<p align="center">Proposal Area Jim Engandela - Horizon Software</p> <p>Zone: <input type="text"/> 0 Area: PICK OR TYPE AREA NAME Placement: <input type="text"/> n</p> <p><small>This area includes the following products and features:</small></p>		<p align="center">Proposal Product Detail Jim Engandela - Horizon Software</p> <p align="center">PICK OR TYPE AREA NAME</p> <p>Installation: <input type="text"/> Min.Sec <input type="text"/> Hours to Min \$70.00/Hour INSTALLED PRICE: <input type="text"/></p> <p>Misc Parts: <input type="text"/> Amt Weight: <input type="text"/> Rack Spaces: <input type="text"/> Finish: <input type="text"/></p> <p>Wire Type: 1 Good AC Consumption: <input type="text"/> W: <input type="text"/> H: <input type="text"/> D: <input type="text"/></p> <p>Amount: 0.00 DC Consumption: <input type="text"/> Warranty: <input type="text"/></p>		<p align="center">Done</p>	
<p>Pick Text Add to Text Library Clear Area Text</p>		<p>Spell Check Text Ruler</p>		<p>Done</p>							
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	Defaults 5 Pricing SubTotals	Defaults 6 Project Tracker	Defaults 7 Other Prefs	Defaults 8 POS Settings	
Replace Fields with Default Text	Example Shown Below	Other Defaults 5 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 Products & Installation prices are estimated. Total price will consist of installed products & actual installation.	Guaranteed 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	
Products:	Products: \$10,000.00	\$13,000.00	Discount Label Courtesy Discount Applied
Labor:	Installation: \$2,000.00	\$3,000.00	
Products + Installation:	Products & Install: \$12,000.00	\$16,000.00	4,000.00
Other Labor:	Other Labor:		
Regular:	Parts & Materials: \$500.00	\$750.00	
Parts & Services:	Extra: Parts & Services:		

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.

	<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
Sub Total:	52,663.54	52,545.78
Tax:	2,184.74	
Grand Total:	54,848.28	

Date: _____

Jim Engandela

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.

Multi Archive ? Select a Proposal or Project to Archive Done Cancel

<i>Multi Archive</i>	<i>Sold Done</i>	<i>BY DATE</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

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 Text	Prod Text	List Price	Sales Tax
Y	S	Y	Y

A Make-Model-Cat-Desc-Fin

Prices Guaranteed
 From: 11-23-20
 For: 30 Days
 Until: 12-23-20

Proposal Date
 11/23/20

Creation Date

Printer Setup

Show Print Dialog

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



- No Breaks
- Work Order
 - Work Order (Detail)
 - Work Order (Special)
 - Install Sales Invoice
 - Project Sales Invoice
 - Blank Change Order
 - Blank Quality Control

- Mailing Labels
- Project Reconciliation

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

- Proposal Sections
- 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 w/Parts Labor
 - Extra Text Pages Editable Extra Page
 - Extra Contract Page
 - Technical Services Page
 - Follow-Up Letters
 - Scope of Work Page

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/ROSENUF - LOUDSPEAKER - CHERRY/ROSENUF (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 ROSENUF - 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		

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

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 Cost
- Warehouse Pallet
- Product Sold Stickers

No Breaks

- Work Order
- 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

Proposal Sections

view print

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

Product & Install Prices Combined Entire Proposal

Proposal Sections

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 w/Parts Labor
- Extra Text Pages Editable Extra Page
- Extra Contract Page
- Technical Services Page
- Follow-Up Letters
- Scope of Work Page

Show Proposal Total Amount on Cover page

Export Project Sales Invoice to Excel

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								ProposalTracker	
Click on a proposal to view									
Fav	Rep	Proposal	Date	Client	Company	Project	Ant	PROPOSAL NUMBER	FINDPROPOSAL 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 Mem	util.resetFindProposalArea?2020		
Selected Phase	Sold Done	Products: \$42,042.00	Install: \$3,534.00	Misc: \$6,202.10	Subtotal: \$51,778.10	PROPOSAL NUMBER	PREVIOUS NUMBER
All Phases	<input type="checkbox"/>	HP: \$347.25	Hours: 60.0	GP: 39.8%	Grand Total: \$53,880.20	FINDPROPOSAL AREA?	zoneArea.c
SYSTEM DESIGN This proposal represents a design carefully prepared with your requirements,						100400	100300000000
DEN This proposal represents a design carefully prepared with your requirements, our						100400	100400092249
1 LINN - ARKIV - CARTRIDGE - MOVING.COIL CARTRIDGE 2 200.00						100400	100400092249

Show All Products	Sort	Proposal Products						Find Product	Replace					
Detail List	Product Utilities	Line List Jim Engandela - Horizon Software						Add Area	View Areas	Done				
Click on Area to show only that Area														
		View	Delete	Pick	Qty	Make	Model	Unit	Unit Sell	Total Sell	Unit List	Total List	PROPOSAL	FINDPROPOSAL AREA?
Zone-Area		Products: \$21,021.00		Install: \$1,470.00		Misc Parts: \$3,151.05		Sub Total: \$25,642.05						
On DEN						1 LINN	ARKIV	ea	2200.00	2200.00	2,200.00	2,200.00	100400	100400092249
On DEN						1 LINN	EKOS	ea	2695.00	2695.00	2,695.00	2,695.00	100400	100400092249

CPS 9.0v2

Proposal/Contract: Reduce body size



Proposal1001-08

Permit: 1234
10/20/2020Section: 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 & Installation prices are estimated.

Total price will consist of installed products & 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	<h1>Proposals</h1>																				Done							
Duplicate		Click on a proposal to view																				Projects							
Delete		ProposalTracker																											
Fav	Rep	Proposal	Date	Client		Company		Project		Amt																			
<input type="checkbox"/>		1004-00		A TEMPLATE, 3X6						\$0																			
<input checked="" type="checkbox"/>	A	WP	1003-00	3-2-2005	ENGANDELA, JIM		HORIZON SOFTWARE		CUSTOM AUDIO & VIDEO		\$65,033																		
<input checked="" type="checkbox"/>	C	WP	1001-08	3-2-2005	ENGANDELA, JIM		HORIZON SOFTWARE		CUSTOM AUDIO & VIDEO		\$27,187																		
<input checked="" type="checkbox"/>	B	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	Create a new Proposal	<h1>Proposals</h1>																				Done							
Duplicate		Click on a proposal to view																				Projects							
Delete		? 5																				ProposalTracker							
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.
- 4

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.

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.

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 ? 2	<h1>Proposals</h1>								Done	
Duplicate		Click on a proposal to view								Projects	
Delete										ProposalTracker	
Proposal Date	Client	Company	Project	Rep	Amnt	Done	Fav				
9998-00	10-6-2020	ENGANDELA, JIM	HORIZON SOFTWARE	CUSTOM AUDIO & VIDEO SYSTEM	\$391	<input type="checkbox"/>	<input type="checkbox"/>				
9997-00	A TEMPLATE, 1X6				\$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	Sold Done	Products:	Install: \$0.00	Misc: \$0.00	Subtotal:	\$0.00
All Phases	<input type="checkbox"/>	HP:	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>																		Done																	
Duplicate				Click on a proposal to view																		Projects																	
Delete				ProposalTracker																																			
Proposal Date	Client	Company	Project	Rep	Ant	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				Add Client to Contacts	Done
Please use normal case text								
CLIENT:		Salutation	First Name	Last Name	Pick Contact	Proposal: 1001-10		
			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 ZIP: 54770				MOBILE:		
	COUNTRY:					PAGER:		
ADDRESS:	ADDRESS:					FAX:	715-287-4464	
	CITY:					E-MAIL:	horizonse@trivest.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 Text	Prod Text	List Price	Sales 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

No Breaks

- Work Order
- 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

Proposal Sections

view print

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

Product & Install Prices Combined

Entire Proposal

Proposal Sections

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 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. Show Proposal Total Amount on Cover page

Custom proposals print without page breaks between areas. Export Project Sales Invoice to Excel

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

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.

Run CPS in Secure Mode

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

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 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 Text	Prod Text	List Price	Sales 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

No Breaks

- Work Order
- 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

Proposal Sections
view print

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

Product & Install Prices Combined Entire Proposal

Proposal Sections
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 w/Parts Labor
- Extra Text Pages Editable Extra Page
- Extra Contract Page
- Technical Services Page
- Follow-Up Letters
- Scope of Work Page

Custom proposals print without page breaks between areas. Show Proposal Total Amount on Cover page

These proposals print one area per page. Export Project Sales Invoice to Excel

A	B	C	D	E	F	G	H	I	J	K
PROPOSAL_N	CLIENT_FUL	COMPANY	ZONEL_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	EA CUSTOM - LCDH1 - WIRE & CABLE - LCD PROJECTOR WIRING PACKAGE	WIRE & CABLE	180.00	180.00	T
5	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA CUSTOM - LL2 - WIRE & CABLE - STEREO LINE LEVEL FEEDER CABLE	WIRE & CABLE	40.00	40.00	T
6	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA DRAPER - ACCESS VIDEO/M2500 - PROJECTION SCREEN - 106" HDTV FORMAT - TAB TENSIONED - M2500 SURFACE	PROJECTION SCREEN	2395.00	2395.00	T
7	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA DRAPER - LVCR8 & LVCS - VIDEO INTERFACE CONTROL - LOW VOLTAGE CONTROLLER W/ SWITCH	VIDEO INTERFACE CONTROL	233.00	233.00	T
8	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA POLK AUDIO - CS300 - CENTER SPEAKER - W/ TRI-LAMINATE DOME TWEETER	CENTER SPEAKER	299.95	299.95	T
9	1642-00	v1	Stewart	c/o The Hopkins Company	2	EA POLK AUDIO - FX500 - LOUDSPEAKER - BIPOLE / DIPOLE SURROUND	LOUDSPEAKER	249.95	499.90	T
10	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA POLK AUDIO - PSW650 - SUBWOOFER - POWERED BLACK	SUBWOOFER	649.95	649.95	T
11	1642-00	v1	Stewart	c/o The Hopkins Company	2	EA POLK AUDIO - RT55 - BOOKSHELF SPEAKER - W/ TRI-LAMINATE DOME TWEETER BLACK	BOOKSHELF SPEAKER	289.95	579.90	T
12	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - DVP-CX8500 - DIGITAL VIDEO DISC - 200 DISC DVD / CD CHANGER	DIGITAL VIDEO DISC	799.00	799.00	T
13	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - P55-610 - MOUNTING ACCESSORY - PROJECTOR MOUNT - FOR VPL-VW10HT	MOUNTING ACCESSORY	499.00	499.00	T
14	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - SLV-M131HF - VCR - HI-FI W/ SMARTILE	VCR	269.99	269.99	T
15	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - STR-DA333ES - SURROUND RECEIVER - ES SERIES - DIGITAL DOLBY	SURROUND RECEIVER	699.00	699.00	T
16	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - VPL-VW10HT - VIDEO PROJECTOR - HI RESOLUTION LCD - 1000 ANSI LUMENS - DUAL ASPECT RATIO	VIDEO PROJECTOR	6499.00	6499.00	T
17	1642-00	v1	Stewart	c/o The Hopkins Company	2	GREAT ROOM HOME THEATER		0.00	0.00	T
18	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA AUDIOPLEX TECHNOLOGY - S-2 W/ STICK-EMIT - INFRARED REPEATER SYSTEM - 2 WAY - DUAL FREQUENCY	INFRARED REPEATER SYSTEM	399.00	399.00	T
19	1642-00	v1	Stewart	c/o The Hopkins Company	4	EA AUDIOPLEX TECHNOLOGY - STICK-EMIT - INFRARED REPEATER SYSTEM - EMITTER	INFRARED REPEATER SYSTEM	10.00	40.00	T
20	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA POLK AUDIO - CS400 - CENTER SPEAKER - W/ TRI-LAMINATE DOME TWEETER	CENTER SPEAKER	399.95	399.95	T
21	1642-00	v1	Stewart	c/o The Hopkins Company	2	EA RBH - FS-12-P - SUBWOOFER - HIGH POWER IN-WALL W/ 200W AMP	SUBWOOFER	799.00	799.00	T
22	1642-00	v1	Stewart	c/o The Hopkins Company	4	EA SONANCE - D7001 - IN-WALL SPEAKER - 3 WAY - REINFORCED GLASS COMPOSITE WOOFER - PIVOTING METAL TWEETER	IN-WALL SPEAKER	375.00	1500.00	T
23	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - DVP-S530D - DIGITAL VIDEO DISC - COMPONENT VIDEO OUT	DIGITAL VIDEO DISC	419.99	419.99	T
24	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - KV-S5342 - TV - 35" GREY	TV	1299.99	1299.99	T
25	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - SLV-M131HF - VCR - HI-FI W/ SMARTILE	VCR	269.99	269.99	T
26	1642-00	v1	Stewart	c/o The Hopkins Company	1	EA SONY - STR-DA333ES - SURROUND RECEIVER - ES SERIES - DIGITAL DOLBY	SURROUND RECEIVER	699.00	699.00	T

Proposal/Print Menu: Improve Sold Stickers

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 Text	Prod Text	List Price	Sales Tax
Y	S	Y	Y

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

1st Draft
Client Proposals
Done

Product & Install Prices Separate
Entire Proposal

Proposal Sections

view print

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

Product & Install Prices Combined
Entire Proposal

Proposal Sections

view print

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

SOLD STICKER		SOLD STICKER		SOLD STICKER	
Jim Engandela		Jim Engandela		Jim Engandela	
Horizon Software		Horizon Software		Horizon Software	
100100		100100		100100	
3		1			
Linn		Linn		KEILIDH/KABER	
SOLD STICKER		SOLD STICKER		SOLD STICKER	
Jim Engandela		Jim Engandela		Jim Engandela	
Horizon Software		Horizon Software		Horizon Software	
100100		100100		100100	
1		4		1	
Linn		Linn		Linn	
ARKIV		SILVER		KOLEKTOR	

POS/All Invoices: Add email and New Labels

Modify Sales Inv	Modify Costing	Modify Packing	Invoice Set-Up		?	Done
Address 1:		Jim Searing	Printer Setup			
COMPANY		Searing Residence	Show Print Dialog <input type="checkbox"/>			
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	A TAX RATES		SPECIALIST John Gilmore	
Tax Labor?		NO	B		PROPOSAL #	
Show Tax ?		<input checked="" type="radio"/> YES <input type="radio"/> NO	<input checked="" type="radio"/> 1	8.00%	Added.....	5.00%
			<input type="radio"/> 2	5.00%	Compound	5.00%
			<input type="radio"/> 3	5.00%		

Print/Prev 1	2	3	Invoice		?	Costing	Done
Cost:	Packing List:	Duplicate Sales Invoice	SI #5766		?	Set Up	
Address 1:		Jim Searing	Address 2:		10/28/2011		
Searing Residence		Home: 138-987-9765	Jim Searing				
1119 Englewild Dr		Work: 238-987-9765	Searing Residence				
Glendora, CA 91741		Other: 338-987-9765	3513 Finley				
Email: horizon@trivest.net		Mobile: 909 223 4732	Newport Beach, CA 92663				
Reference Description:		Fax: 626 857 0928	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	Product Tax	No Labor Tax
	1 ea	RUNCO D73D ULTRA CTNEWIDE AUTOSCOPE LONG THROW		74695.00	74695.00	<input type="checkbox"/>	<input type="checkbox"/>
	1 ea	RUNCO 6 PACK OF PRECISE GLASSES (FOR GUESTS)		180.00	180.00	<input type="checkbox"/>	<input type="checkbox"/>
	4 ea	RUNCO PREMIUM GLASSES (FOR YOU AND FAMILY)		135.00	540.00	<input type="checkbox"/>	<input type="checkbox"/>
		I ORDERED THE PROJECTOR TODAY				<input type="checkbox"/>	<input type="checkbox"/>

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



INVOICE
 SI #5766
 10/28/2011
 Permit: 1234

Address 1:

Jim Searing
 Searing Residence
 1119 Englewild Dr
 Glendora, CA 91741

Home: 138-987-9765
 Work: 238-987-9765
 Other 338-987-9765
 Mobile: 909 223 4732
 Fax: 626 857 0928

Email: horizon@trivest.net

Address 2:

Jim Searing
 Searing Residence
 3513 Finley
 Newport Beach, CA 92663

Reference Description:

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 D/3D 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 LUCH HAHAAAA			

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 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"/>
	Grene, Orville	Orville Grene 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				-7753 <input type="checkbox"/>
	Somers, Chris				-7666 <input type="checkbox"/>
					-9700 <input type="checkbox"/>

Primary Email

Jim Engandela - Horizon Software

Email: horizon@trivest.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 T - LOUDSPEAKER - CHERRY/ROSENU T (INC. AKTIV CARDS CHERRY OR ROSENU T	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
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			

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	
Other Defaults 7							Next	Done
Proposal & POS Contract Credit Card Surcharge Text							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		QUOTATION 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: TOHOUSE ACTIVE CARDS (MONO ONLY): BLACK	100.00	100.00		
		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

EME AUDIO & VIDEO SYSTEMS

Orville Grene - Orville Grene Consulting

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	\$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:	2.93
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

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	<input type="checkbox"/>																					
	FRIDGIDARE	015235-024	STANDARD	VALVE	WHITE	2.80	<input type="checkbox"/>																					
	FRIDGIDARE	015616-024	STANDARD	VALVE	BISQUE	2.80	<input type="checkbox"/>																					
	FRIDGIDARE	016927-012	VAC	PAN	WHITE	34.95	<input type="checkbox"/>																					
	FRIDGIDARE	016940-012	VAC	PAN	BISQUE	34.95	<input type="checkbox"/>																					
	FRIDGIDARE	025319	FIRE	STOP	RING	14.95	<input type="checkbox"/>																					
	FRIDGIDARE	030177	SOUND	OFF	MUFFLER	24.95	<input type="checkbox"/>																					
	XANTECH	03072440	CONNECTOR	DD4	KEYPAD &	12.00	<input type="checkbox"/>																					

Delete Products	Find Duplicate Products	8824 of 8824	Product Utility	Clean Products	Open Vendor Library	Done
Scroll down to view field definitions						
Import Product	<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"> 1. Click on "Import" button. 2. Locate and open the File containing the data you want to import. 3. At the "Import Mapping" screen; <ol style="list-style-type: none"> 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. 					
<i>Importing Tab or Comma delimited file</i>						
Print these Instructions & Field Definitions						

POS/Sales Invoices: Total of Sales Invoices button

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	
QT	SI	CO	SO	WO	PO	AF	SALES INVOICES																		Invoices	Done		
							click on sales invoice to view																		Total Due			
#	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		Rocky Customers			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

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	AUDIOVISUAL DE -	UL 10'	1.00	0.60	ea																				
	ADEMCO	112	BURG	ACCESS CONTROL ELECT -		2.00	1.20	ea																				
	ADEMCO	116	BURG	CONTACTS -	BUTTON	3.00	1.80	ea																				
	ADEMCO	11BR	BURG	SHOCK/SOUND DET -		4.00	2.40	ea																				
	ADEMCO	11WH	BURG	SHOCK/SOUND DET -		5.00	3.00	ea																				
	ADEMCO	1321	BURG	POWER -	TRANSFORMER	6.00	3.60	ea																				
	ADEMCO	1332	BURG	POWER -	TRNSFRMR 9V	7.00	4.20	ea																				
	ADEMCO	1332X10	BURG	POWER -	X-10	8.00	4.80	ea																				
	ADEMCO	1361	BURG	POWER -	AC	9.00	5.40	ea																				
	ADEMCO	1361X10	BURG	CONTROL PANELS -		10.00	6.00	ea																				
	ADEMCO	1451-24	BURG	POWER -	TRANSFORMER	11.00	6.60	ea																				
	ADEMCO	1877SM	BURG	SPACE PROTECTIO -		12.00	7.20	ea																				
	ADEMCO	19	BURG	CONTACTS -	TAMPER	13.00	7.80	ea																				
	ADEMCO	199-PA	BURG	SPACE PROTECTIO -	PET	14.00	8.40	ea																				
	ADEMCO	1990	BURG	SPACE PROTECTIO -		15.00	9.00	ea																				
	ADEMCO	24	BURG	HARDWARE MISCELLANEO -		16.00	9.60	ea																				
	ADEMCO	2520	BURG	SHOCK/SOUND DET -		17.00	10.20	ea																				
	ADEMCO	258WH	BURG	CONTACTS -	TOGGLE	18.00	10.80	ea																				
	ADEMCO	264	BURG	CONTACTS -	ADEMCO	19.00	11.40	ea																				
	ADEMCO	266	BURG	CONTACTS -	ADEMCO	20.00	12.00	ea																				
	ADEMCO	268	BURG	CONTACTS -	ADEMCO	21.00	12.60	ea																				

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	\$91	\$913.29																										
SI #7197			Bill Allen	W.B. Construction Inc.				3/8/2014	\$5,608.14	\$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	Product Tax									
	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 & Jim 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**  **Done**

Make: LINN Department: Product Tax:
 Model: AV 5105 SKU#:
 Category: Location: No Labor Tax:
 Description: Supplier: LINN PRODUCTS
 Finish:

Features: Compact high quality 240 watts per channel stereo power amplifier. Dual mono design for maximum separation and performance with active crossover interface.

Parts: Phase:
 Opt Qty:
 Favorite:
 Placement:

Unit: **CALCULATOR** A% B-shipping **PRODUCT PRICE**
 Net Cost: 1,137.00 % \$ **COST/EA: 1,137.00**
 Sell Price: 1,895.00 % **GP: 40.0% SELL PRICE: 1,895.00**
 List Price: 1,895.00 **LIST PRICE: 1,895.00**

Installation: Min.Sec Hours to Min Rate: 70.00 Charge: 35.00 **INSTALLED PRICE: 1,930.00**

Base Wire \$: Rack Spaces: W 381mm x H 80mm x D 355mm **Import Picture**
 Dimensions: W H D
 Weight: kg Warranty:
 AC Consumption: watts Install Notes:
 DC Consumption: amps

Add Product to Library    **Product Library Detail** 

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 <input type="checkbox"/> Done <input type="checkbox"/>	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 <input checked="" type="checkbox"/> Done <input type="checkbox"/>	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 BOARDS FOR CHERBY					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			View PO's	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	DESCRIPTIO	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 Cdls900MHz 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	nlr5	feeder cable category 5 - 4 twisted pair	10.00

Project/Invoices: Include Project number with Invoice Number



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

Invoice Number
1855-00 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

#	Invoice #	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	-\$5,292,960.	
SI #6925	Kirk Tahmizian			2/4/2014	\$566.15	\$566.15

You can now create Forms in your Letter Library.

Forms will have an X in the Forms check box and can be sorted to the top of the screen.

You can Duplicate Forms and Letters.

You can Preview Forms or Letters before printing

You can change your Printer Setup

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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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	Letter Library																				Print Menu	Done						
Add Form	?	Use the Contact Mail Merge to Send Letters click on Letter to view																				Utility	Mail Merge					
Form	Date	Title																		Contact	Sender Kind	Fav	Del					
13	X	11/14/2015	THX Form																		Contact	SS	F	A	🗑️			

Add Letter	Duplicate	IP 13	Edit Letter	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 _____



EME AUDIO & VIDEO SYSTEMS

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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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 _____

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 "]

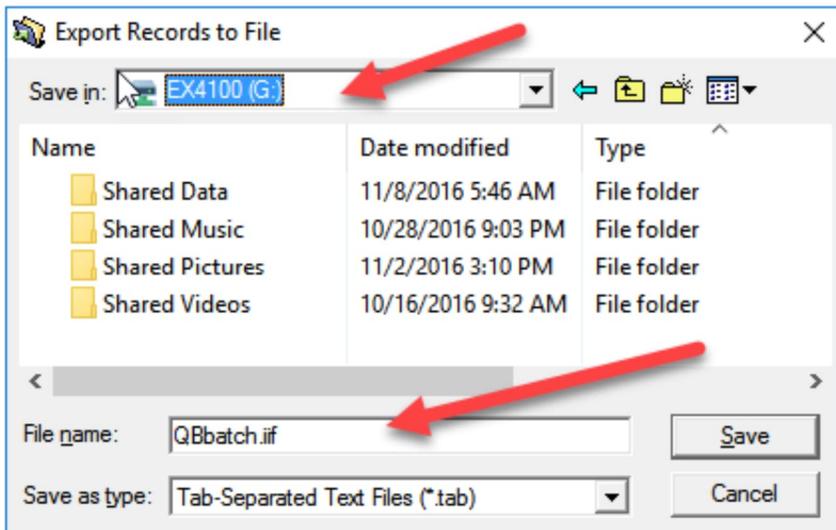
Version 8.1v4

Enhancement: QuickBooks Save File Option

Check this box in Setup/Other

Quick Books

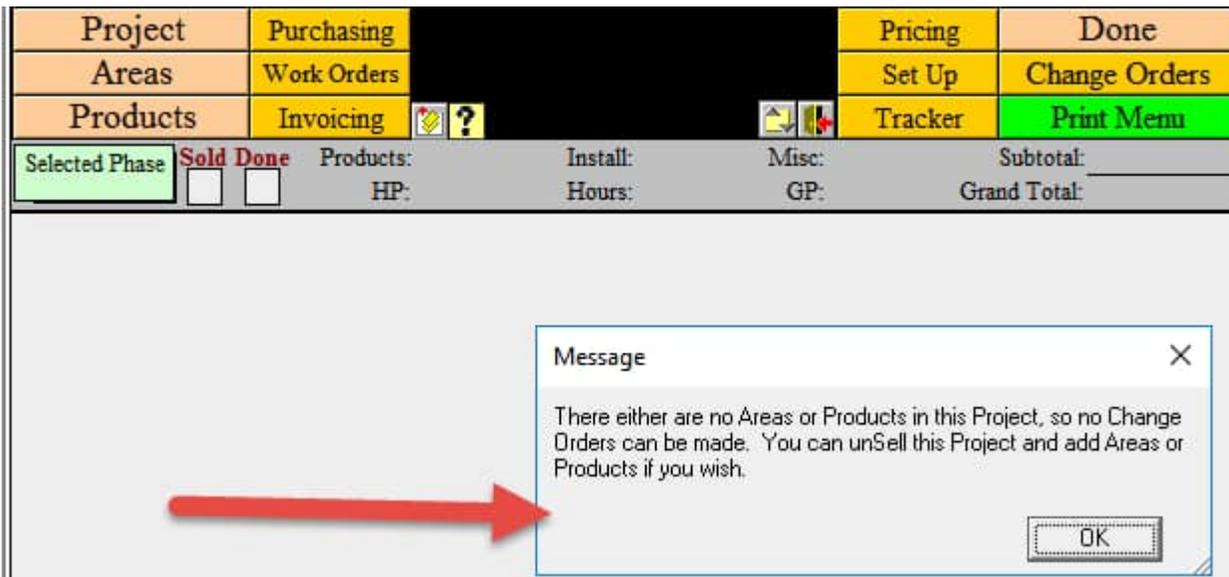
- Reverse Contact Name in Quickbooks to Last Name - First Name
Please Note: This setting must conform to the naming convention used in your Quickbooks contact.
- Save File dialog box Option, enabling you to direct the QB Export.iif file to a specific location, instead of automatically placing it in the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



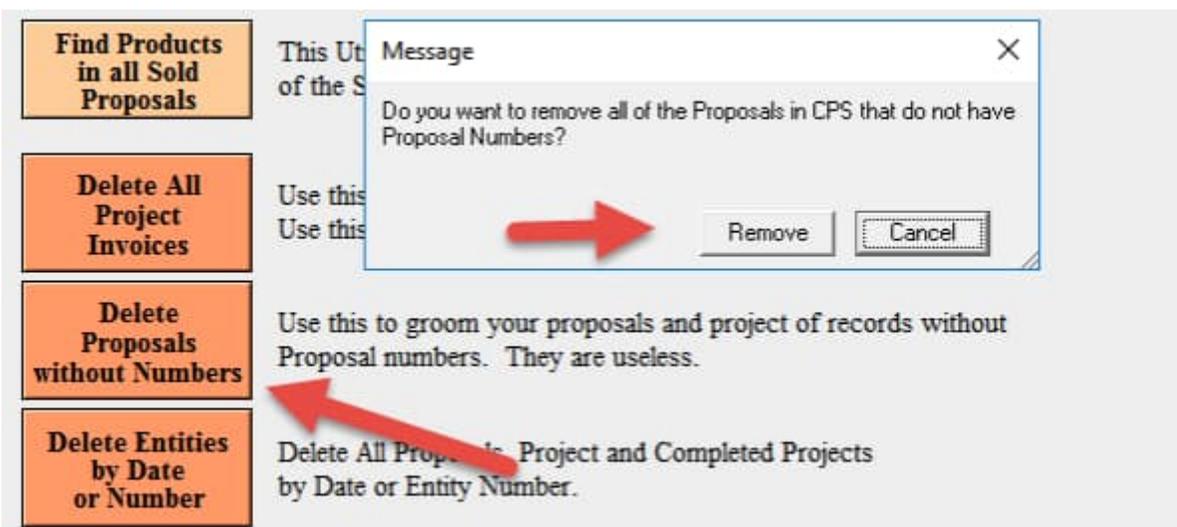
Fix: Proposal/Projects: Fix Tax B labor calculation

Version 8.1v3

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



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



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	Product	\$28,964.80	Install: \$8,785.00
All Phases	<input type="checkbox"/>	<input type="checkbox"/>		\$118.88	Hours: 146.4
					Misc: \$1,448.25
					Subtotal: \$39,198.05
					Grand Total: \$40,334.57

SYSTEM DESIGN This proposal represents a design carefully prepared with your requirements, our experience, and our 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

Click

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 our 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 SONANCE	T3000	EA	165	330
Parts & Materials: = \$1,448.25	2 MASTER BATH	This area includes the following products and features:			
-----	2 SONANCE	T3000	EA	165	330
Subtotal = \$39,198.05	3 BEDROOM 2	This area includes the following products and features:			
Tax:: = \$1,136.52	2 SONANCE	T2000	EA	125	250
=====	4 BEDROOM 3	This area includes the following products and features:			
Grand Total: = \$40,334.57	2 SONANCE	T2000	EA	125	250
Total Install Hours = 146.4	5 GUEST BATHROOM	This area includes the following products and features:			
	2 SONANCE	T2000	EA	125	250
	6 DINING ROOM	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
	7 KITCHEN	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
	8 HOME THEATER SYSTEM	This area includes the following products and features:			
	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

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	Product	\$28,964.80	Install: \$8,785.00	Misc: \$1,448.25	Subtotal: \$39,198.05
All Phases			\$118.88	Hours: 146.4	GP: 42.4%	Grand Total: \$40,334.57

SYSTEM D	represents a design carefully prepared with your requirements,
1 MASTER B	includes the following products and features:
2 ea SO	ALL SPEAKER - 3 WAY 330.00
2 MASTER B	includes the following products and features:
2 ea SONANCE - T3000 - IN-WALL SPEA	165.00
3 BEDROOM 2	This area includes the following products and features:
2 ea SONANCE - T2000 - IN-WALL SPEA	175.00
4 BEDROOM 3	This area includes the following products and features:
2 ea SONANCE - T2000 - IN-WALL SPEA	175.00
5 GUEST BATHROOM	This area includes the following products and features:
2 ea SONANCE - T2000 - IN-WALL SPEAKER - 2 WAY	250.00

Click

Message

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

Tyler Products Entire Prop

Then

Show All Products	Sort	Proposal Products			Add Area	View Areas	Done
Detail List	Product Utilities	Line List					
Click on Area to show only that Area		View Delete Pick	Qty	Make	Model	Unit	Unit Sell
50		Add ↓ ↓ Place ↓					Total Sell
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 BEDROOM 2							175.00
4n BEDROOM 3							175.00
5n GUEST BATHROOM							175.00
6n DINING ROOM							339.95
6n DINING ROOM							219.95
6n DINING ROOM							40.00
7n KITCHEN							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	

Message

Export... Area/Make/Model or Make/Model.

Make/Model Area/Make

1535-00 - 9/9/1999 - Harrington, T. G. - Company - Jeff Ednenfield	1n MASTER BEDROOM	2 SONANCE	T3000	EA	165	330
Products: = \$28,964.80	2n MASTER BATH	2 SONANCE	T3000	EA	165	330
Installation: = \$8,785.00	3n BEDROOM 2	2 SONANCE	T2000	EA	125	250
Parts & Materials: = \$1,448.25	4n BEDROOM 3	2 SONANCE	T2000	EA	125	250
-----	5n GUEST BATHROOM	2 SONANCE	T2000	EA	125	250
Subtotal = \$39,198.05	6n DINING ROOM	1 POLK AUDIO	PSW120	EA	289	289
Tax:: = \$1,136.52	6n DINING ROOM	2 POLK AUDIO	RM2300	EA	199.95	399.9
-----	6n DINING ROOM	2 POLK AUDIO	RMBKT	ea	40	80
Grand Total: = \$40,334.57	7n KITCHEN	1 POLK AUDIO	PSW120	EA	289	289
Total Install Hours = 146.4	7n KITCHEN	2 POLK AUDIO	RM2300	EA	199.95	399.9
	7n KITCHEN	2 POLK AUDIO	RMBKT	ea	40	80
	8n HOME THEATER SYSTEM	6 CUSTOM	LABOR	HR	0	0
	8n HOME THEATER SYSTEM	1 CUSTOM	LCDH1	ea	199	199
	8n HOME THEATER SYSTEM	1 CUSTOM	SSPW1	EA	60	60
	9a PHAST AUTOMATION SYSTEM BASE EQUIPMENT	1 PHAST	LANDMARK CP	EA	500	500
	9a PHAST AUTOMATION SYSTEM BASE EQUIPMENT	1 PHAST	PLB-CF10	EA	799	799
	9a PHAST AUTOMATION SYSTEM BASE EQUIPMENT	1 PHAST	PLC-IN7	EA	250	250
	9a PHAST AUTOMATION SYSTEM BASE EQUIPMENT	1 PHAST	PLC-IRIN	EA	250	250
	9a PHAST AUTOMATION SYSTEM BASE EQUIPMENT	1 PHAST	PLC-MCU4	EA	849	849

Or Select Products, showing only the 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	tr	0.00	0.00	

Message

Export...
Area/Make/Model or
Make/Model.

Make/Model

Area/Make:

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 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	Delete Entites						Done Cancel
Delete Tagged Entities	Show All		Find Entites by Date or Number				
	Enter Find	Perform Find	Tag Entites to Delete Click Deleted Tagged Entites				
<i>Multi</i> Delete	<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

**Mr. Harrington - Company
Electronic Systems**

Proposal: 1535-00

3/21/2016 Section: 6 Page: 1

EME AUDIO & VIDEO SYSTEMS

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	Proposal Pricing		?	Proposal Set-Up	Done
Mr. Smith - Mt. Airy Baptist Church							
Products							
Selected Phase <u>All Phases</u>		Adjust All Product Prices				33.3% GP	
		ORIGINAL PRICES	<input type="text"/>	%	<input type="button" value="Update"/>	Adjust Select Products \$17,812.00	
		Adjust All Product Costs	<input type="text"/>	%	<input type="button" value="Update"/>	<input type="button" value="Reset Costs"/>	
Project Management Amount to Labor 5		Add Prep & Travel Time to Labor 6		Labor			
						<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		
						Product Labor:	60.9 \$3,656.00
						Difficulty Factor	<input type="text"/>
						← Other Labor:	\$0.00
						Adjust Labor:	<input type="text"/>
						Installation:	60.9 \$3,656.00
Misc Parts							
<u>Suggested Referral Bonus</u>		Parts & Materials: <input type="text" value="0.00"/> + -				Misc Parts: \$890.60	
% of Equip \$445.30		Referral Bonus: <input type="text" value="0.00"/>				Extra Warranty: \$0.00	
% of Total \$558.97		Base Parts/Wire Total:				On-Site Service: \$0.00	
Change Parts Label: <input type="radio"/> YES <input checked="" type="radio"/> NO						Parts & Materials: \$890.63	
Proposal Totals							
	<u>Cost</u>	<u>Profit</u>	<u>System Price</u>	<u>GP</u>	<u>Products & 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	HP Hourly Profit (Gross Profit/Labor Hours) \$134.57		
Adjust Tax: <input type="text" value="100.00"/>							
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 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							
<p>Run CPS in Secure Mode</p> <p>Enable FileMaker Menus</p>		<p>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.</p> <p>Please note: In order for this feature to work it is necessary to</p> <ol style="list-style-type: none"> 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. 					
<p>Open Print Setup</p> <p>Open File Sharing</p> <p>Set Spell Checker</p>		<p>SCREEN MAGNIFICATION</p> <p>100%</p> <p>Magnify the CPS screens for high resolution monitors. Blank = 100%. Please note some onscreen button text might not align properly at higher magnification.</p>		<p>WINDOW SETTINGS</p> <p>Maximize</p> <p>Maximize expands the CPS windows to the full computer screen.</p> <p>Recommended: Minimize shrinks the CPS windows to the size of the CPS program.</p>			
<p>Set Software Preferences</p> <p><u>After clicking on this button</u> Un-Check "Show Status Line Help" Set Memory Cache to 5000 or 9999 if you have 32 meg of ram or more.</p>		<p><input checked="" type="checkbox"/> 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.</p> <p><input type="checkbox"/> Do not Sort Proposals & Projects Check this box if you do not want to Sort when entering the Proposal and Project modules.</p> <p><input type="checkbox"/> Do not Sort POS Quotes and Invoices Check this box if you do not want to Sort when entering the POS modules.</p> <p><input type="checkbox"/> Enable SCPS Access Check this box only if you are a Horizon SmartPartner and are using the Super Custom Proposal System.</p> <p style="text-align: right;"> Exit CPS</p> <p>Note: Only 50 .fp5 files can be in the SCPS folder. Remove SCPSguest.fp5</p>					

Enhancement: Proposal & Products: Clean Products

Enhancement: Proposal & Products: Clean Products

Delete Products	Find Duplicate Products	8824 of 8824	Product Utility Scroll down to view field definitions.	Clean Products	Open Vendor Library	Done
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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 Filter, Tag and Delete that Manufacturers products, and then do the import and **DO NOT** delete the Product Library.

Importing Tab or Comma delimited file

Print these Instructions & Field Definitions

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.

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.

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	Qty	Make	Model	Unit Sell	Total Sell	Unit List	Total List
Zone-Area		Products: \$1,170.00	Misc: \$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

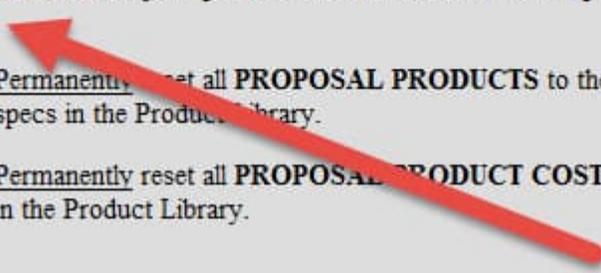
Product Utilities

For Products in this Proposal

? Done

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 PROPOSAL PRODUCTS to the prices and specs in the Product Library.
Update All Product COSTS only	<u>Permanently</u> reset all PROPOSAL PRODUCT COSTS to the Costs in the Product Library.
Delete All Empty Products	<u>Permanently</u> delete all PRODUCTS in this proposal with "ENTER" or blank model fields from templates.
Zero All Install Labor	<u>Permanently</u> delete all INSTALLATION LABOR associated with each product in this proposal.
Reset All Product Placement Codes	<u>Permanently</u> reset all PRODUCT PLACEMENT CODES to "N" in this proposal.
Reset All Product Tax to "T"	<u>Permanently</u> reset all PRODUCT TAX CODES 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.

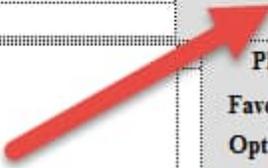
This can be done on each Product in the Product Library so when they are added to a Proposal or POS Quote or Invoice they will default to the No Tax option.

Add Product to Library		Product Library Detail			Spell	Done
Make:	LINN	Department:		Product 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	Opt Qty:	1	
Features:	Programmable, high-power, long range, infra-red remote control for hand held or table top operation	Parts:		Favorite:	A	
				Placement:		
Unit:	EA	CALCULATOR	A%	B-shipping	PRODUCT PRICE	
List Price:	390.00				LIST PRICE:	390.00
Sell Price:	390.00	Manual Entry	%		GP: 40.0%	SELL PRICE: 390.00
Net Cost:	234.00	Manual Entry	%	\$	COST/EA:	234.00
Installation:	30.00	Min.Sec	Hours to Min	Rate: 70.00	Charge: 35.00	INSTALLED PRICE: 425.00
Base Wire S:	100.00	Rack Spaces:		W 83mm x H 209mm x D 23mm		Import Picture
Finish:	Black	Dimensions:	W 83mm H 209mm D 23mm			
Weight:	.3 lbs	Warranty:	1 Year Parts & Labor			
AC Consumption:		watts		Install Notes:		
DC Consumption:		amps				
Set Package Flag:	<input type="checkbox"/>	PDF File Name				
<input type="checkbox"/> Do not Include Install Labor Amount on this product into the proposal, Include the Install Labor Time.				PDF Folder Path	C:/CPS_pdf	
				Modify Cost Password:		
Quickbooks Accounts 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.				Supplier:	LINN PRODUCTS	
Important: After changing Account Info. Run the Update QB Accounts on the Product Library/Utility screen.				Asset:		
				Income:		
				Cost Of Goods:		

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.

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	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																						
<input checked="" type="checkbox"/> LINN	5101 PERSONAL		ACCESSORIES - UNIVERSAL LEARNING R -	390.00 ea		A																						

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



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 Model: 5101 PERSONAL HANDSET Category: ACCESSORIES Description: UNIVERSAL LEARNING REMOTE Features: Programmable, high-power, long range, infra-red remote control for hand held or table top operation	Department: SKU#: 5764 Location: Supplier: LINN PRODUCTS	Tax: T No Labor Tax <input checked="" type="checkbox"/> Phase: 0 Placement: n		
Unit: EA	List: 390.00 Sell: 390.00 Cost: 234.00	GP%: 40.0% Set Sell Calc 0.0% Price Calc PO Cost 234.00	EA W/ADJUST ACTUAL SELL: 390.00 INSTALLATION: 35.00	390.00 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. Modify Product Cost Password	Quickbooks Accounts 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 All Phases	Sold Done	Products: \$1,170.00 HP: \$233.35	Install: \$210.00 Hours: 3.0	Misc: \$358.50 GP: 39.4%	Subtotal:	\$1,738.50 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						

Proposal Pricing
New Build

Sales Tax | Sales Comm | **Print Pricing Setup** | ? | Proposal Set-Up | Done

Products

Selected Phase: All Phases

Adjust All Product Prices: ORIGINAL PRICES [] % **Update** | Adjust Select Products: \$1,170.00 | 39.4% GP

Adjust All Product Costs: [] % **Update** | **Reset Costs**

Labor

Project Management Amount to Labor 5 | Add Prep & Travel Time to Labor 6

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

Update | Zero Product Hours

Product Labor: 3.0 Hours | \$210.00 Amount

Difficulty Factor: []

← Other Labor: \$0.00

Adjust Labor: []

Installation: 3.0 Hours | \$210.00 Amount

Misc Parts

Suggested Referral Bonus

% of Equip \$58.50 | Parts & Materials: 0.00 + - | Misc Parts: \$58.50

% of Total \$86.93 | Referral Bonus: 0.00 | Extra Warranty: \$0.00

Change Parts Label: YES 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: System Price
Products:	709.20	460.80	1,170.00	39.4%	1,380.00
Installation:	150.00	60.00	210.00	28.6%	
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			
		Grand Total:	\$1,836.03		

Adjust Tax: 0.00 | Tax A: 97.53 | Tax B: []

Update | HP Hourly Profit (Gross Profit/Labor Hours): \$233.35

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

Tax Summary
New Build

Adjust Sales Tax Total | Set All Tax = T or I | Show All | Show Products | Debug Tax Screen | ? | **Print Tax Summary** | Done

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** **Costing** **Done**
 QT #7198 **Set Up**

Vendor: Done **Address 2:** 3/18/2015

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

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	<input type="checkbox"/>	<input type="checkbox"/>
	1	ea	LINN : K3000 STAND : ACCESSORIES : STANDS (PAIR)	30.00	150.00	150.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	1	m	LINN : K600 CABLE : ACCESSORIES : TRI-WIRE SPEAKER CABLE/METRE	30.00	20.40	20.40	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	1	1.2	LINN : BLACK INTERCONNECT CABLES : ACCESSORIES : 1.2 METER	30.00	85.00	85.00	<input type="checkbox"/>	<input type="checkbox"/>
	1	ea	LINN : GENKI : COMPACT DISC PLAYER : REMOTE CONTROL CD	30.00	1700.00	1700.00	<input type="checkbox"/>	<input type="checkbox"/>
	1	ea	LINN : K3000 STAND : ACCESSORIES : STANDS (PAIR)	1.00	150.00	150.00	<input type="checkbox"/>	<input type="checkbox"/>
	1	ea	LINN : 5101 PERSONAL HANDSET : 5764 : ACCESSORIES : UNIVERSAL	30.00	234.00	234.00	<input type="checkbox"/>	<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 Text	Prod Text	List Price	Sales Tax
Y	Y	N	Y

A Make-Model-Cat-Desc-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 1st Draft Done

Product & Install Prices Separate Entire Proposal

Proposal Sections

view print

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

Product & Install Prices Combined Entire Proposal

Proposal Sections

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 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

Subtract Products	Zone Area	Show All Sort #	CO#	Class	Qty	Make	Model	Category-Description	Unit Sell	Ext Sell
<input type="checkbox"/>	PICK OR TYPE NEW AREA		1	A	1 ea	LNN	-	PACKAGE 1 -	\$500.00	\$500.00
<input type="checkbox"/>	PICK OR TYPE NEW AREA		1	A	1 ea	*LINN	-	CD12 - COMPACT DISC PLAYER - REMOTE	\$20,000.00	\$20,000.00
<input type="checkbox"/>	PICK OR TYPE NEW AREA		1	A	1 ea	*LINN	-	AV 5103RF - LINN AV51 SYSTEM - SYSTEM	\$8,895.00	\$8,895.00
<input type="checkbox"/>	PICK OR TYPE NEW AREA		1	A	8 ea	*LINN	-	KLIMAX 500 SOLO - POWER AMPLIFIER -	\$9,500.00	\$76,000.00
<input type="checkbox"/>	PICK OR TYPE NEW AREA		1	A	2 ea	*LINN	-	KLIMAX TUNE BOX - LOUDSPEAKER	\$4,750.00	\$9,500.00
<input type="checkbox"/>	PICK OR TYPE NEW AREA		1	A	1 pr	*LINN	-	KELTIK AKTIV - LOUDSPEAKER - BLACK	\$9,995.00	\$9,995.00
<input type="checkbox"/>	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

Change Orders
V. N. Devarajan
1588-10 v1

Add Areas & Products | Pricing Parts & Labor | Modify Change Order ?

RePrint C-Orders | Done

Area Text Y | Prod Text Y | List Price N | Sales Tax Y | View/Print C-Orders

Subtract Products | 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					\$,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					\$,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					\$,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

Change Orders
V. N. Devarajan
1588-10 v1

Add Areas & Products | Pricing Parts & Labor | Modify Change Order ?

RePrint C-Orders | Done

Area Text Y | Prod Text Y | List Price N | Sales Tax Y | View/Print C-Orders

Subtract Products | 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

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
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	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A	1 ea	LNN - PACKAGE 1 -					\$500.00	\$500.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A	1 ea	*LINN - CD12 - COMPACT DISC PLAYER - REMOTE					\$20,000.00	\$20,000.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$8,895.00	\$8,895.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$9,500.00	\$76,000.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$4,750.00	\$9,500.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$9,995.00	\$9,995.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$300.00	\$2,700.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$34.00	\$204.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$9.00	\$54.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$2,200.00	\$2,200.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$2,695.00	\$2,695.00	
<input type="checkbox"/>	PICK OR TYPE NEW AREA	1	A							\$3,595.00	\$3,595.00	

Enter CO Number to Print

V. N. Devarajan		P.O. SUMMARY		11/7/14 Page: 1					
Proposal: 1588-10 v1									
EME Audio & Video Systems									
Proposal Phases Presented: <u>All Phases</u>				<u>Specialist</u>					
				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: 348.00	
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-AV5108RF	-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-IKEM1	-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	<input type="checkbox"/>	<input type="checkbox"/>																			
QT #1059			C & G Construction			6/13/2002	\$2,045.00	<input type="checkbox"/>	<input type="checkbox"/>																			
QT #1062			Diversified Pacific		Padua hills	6/26/2002	\$1,000.00	<input type="checkbox"/>	<input type="checkbox"/>																			
QT #1074		Gary Gray				1/30/2003	\$3,000.00	<input type="checkbox"/>	<input type="checkbox"/>																			
QT #1077		Gary Gray				2/18/2003	\$32,886.52	<input type="checkbox"/>	<input type="checkbox"/>																			
QT #1078		Terry Johnson				1/31/2003		<input type="checkbox"/>	<input type="checkbox"/>																			
QT #1079		Mr. Salvo	Dugalley Oberfeld, LLC			2/4/2003	\$19,676.73	<input type="checkbox"/>	<input type="checkbox"/>																			

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																						
LNN	TUNE BOX		ACCESSORIES -	TO HOUSE ACTIVE CARD -	100.00 ea	<input type="checkbox"/>	<input type="checkbox"/>																						
LNN	5101 PERSONAL		ACCESSORIES -	UNIVERSAL LEARNING R -	390.00 ea	<input type="checkbox"/>	<input type="checkbox"/>																						
LNN	KNEKT RCU - WHITE		ACCESSORIES -	KNEKT ROOM CONTROL	340.00 ea	<input type="checkbox"/>	<input type="checkbox"/>																						
LNN	AV 5110 LOCAL		ACCESSORIES -	SMALL FULL-RANGE SPE -	325.00 ea	<input type="checkbox"/>	<input type="checkbox"/>																						
LNN	SILVER INTERCONNECT		ACCESSORIES -	RCA INTERCONNECTS 1. -	300.00 pr	<input type="checkbox"/>	<input type="checkbox"/>																						

Delete Products	Find Duplicate Products	8824 of 8824	Product Utility	Clean Products	Open Vendor Library	Done
Scroll down to view 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 Import Product button.						
<div style="border: 1px solid gray; padding: 5px;"> <p>Message</p> <p>Do you want to Find Duplicates and have them Automatically Tagged, so you can choose to Rename or Delete them?</p> <p>or</p> <p>Do you want to Find Duplicates and have the option to Manually or Automatically Rename them.</p> <p style="text-align: center;"> <input type="button" value="Rename"/> <input type="button" value="Tagged"/> <input type="button" value="Cancel"/> </p> </div>						
These buttons can be used for importing and exporting of products and their field maps						

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 9	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		PAO11	WALL RECEPTCL MODULE																									
<input type="checkbox"/>			Capitol Sales	30.00		68.70			68.70	67%	?																		
<input checked="" type="checkbox"/>	XPRO		PAO11	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
Make:	LINN	Department:		Product Tax:	T
Model:	5101 PERSONAL HANDSET	SKU#:	5764	No Labor Tax:	<input checked="" type="checkbox"/>
Category:	ACCESSORIES	Location:			
Description:	UNIVERSAL LEARNING REMOTE	Supplier:	LINN PRODUCTS		
Features:	Programmable, high-power, long range, infra-red remote control for hand held or table top operation	Parts:		Phase:	0
				Opt Qty:	1
				Favorite:	A
				Placement:	
Unit:	EA	CALCULATOR	A%	B-shipping	PRODUCT PRICE
Net Cost:	234.00	Manual Entry	%	\$	COST/EA: 234.00
Sell Price:	390.00	Manual Entry	%		GP: 40.0% SELL PRICE: 390.00
List Price:	390.00				LIST PRICE: 390.00
Installation:	30.00 Min. Sec	Hours to Min	Rate: 70.00	Charge: 35.00	INSTALLED PRICE: 425.00
Base Wire \$:	100.00	Rack Spaces:	W 83mm x H 209mm x D 23mm	Import Picture	
Finish:	Black	Dimensions:	W 83mm H 209mm D 23mm		
Weight:	.3 lbs	Warranty:	1 Year Parts & Labor		
AC Consumption:	watts	Install Notes:			
DC Consumption:	amps				
Set Package Flag:	<input type="checkbox"/>	PDF File Name			
<input type="checkbox"/> Do not Include Install Labor Amount		PDF Folder Path	C:/CPS_pdf/		
<input type="checkbox"/> Include the Install Labor Time					
	Modify Cost Password:				
Quickbooks Accounts			Asset:		
Use only Alpha Numeric characters in Make Model Description and Account Names.			Income:		
Entering QB accounts names will retain these accounts, otherwise they will be blank.			Cost Of Goods:		
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 on the Product Library/Utility screen.					
Created: 10/21/1981			Modified: 9/30/2015		

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

Main Print Menu
 EME Audio & Video Systems
 Cory & Sara Cahn
 Electronic Systems
 PROPOSAL: 1640-00

Done

Custom Proposals

Dealer Proposals

Selected Phase
 All Phases

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

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

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

No Breaks

- 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

Proposal Sections

view print

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

Product & Install Prices Combined
Entire Proposal

Proposal Sections

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 w/Parts Labor
- Extra Text Pages Editable Extra Page
- Extra Contract Page
- Technical Services Page
- Follow-Up Letters
- Scope of Work Page

Print Follow-up Letters	Client Letters	Trade Letters	Referral Bonus
<p>Print Follow-up Letters</p> <p>Cory & Sara Cahn</p> <p>Electronic Systems PROPOSAL: 1640-00</p> <p>Done</p> <p>Select New Proposal</p> <p>Utility</p> <p>Print <input checked="" type="radio"/> Yes Today's Date: <input type="radio"/> No</p> <p>Print Address: <input checked="" type="radio"/> CURRENT <input type="radio"/> JOBSITE</p>	<p>Client Letters</p> <p>Print All Letters Use Letterhead</p> <p>View Print</p> <p><input type="checkbox"/> <input type="checkbox"/> Post Consultation</p> <p><input type="checkbox"/> <input type="checkbox"/> Post Proposal</p> <p><input type="checkbox"/> <input type="checkbox"/> Acceptance</p> <p><input type="checkbox"/> <input type="checkbox"/> Rejection</p> <p><input type="checkbox"/> <input type="checkbox"/> In Progress</p> <p><input type="checkbox"/> <input type="checkbox"/> Sales Specialist Thankyou</p> <p><input type="checkbox"/> <input type="checkbox"/> Presidents Thankyou</p>	<p>Trade Letters</p> <p>Print All Letters Use Letterhead</p> <p>View Print</p> <p><input type="checkbox"/> <input type="checkbox"/> Architect</p> <p><input type="checkbox"/> <input type="checkbox"/> Builder</p> <p><input type="checkbox"/> <input type="checkbox"/> Electrician</p> <p><input type="checkbox"/> <input type="checkbox"/> Decorator</p> <p><input type="checkbox"/> <input type="checkbox"/> Cabinet Maker</p> <p><input type="checkbox"/> <input type="checkbox"/> Painter</p>	<p>Referral Bonus</p> <p>Print All Letters Use Certificates</p> <p>View Print</p> <p><input type="checkbox"/> <input type="checkbox"/> Architect</p> <p><input type="checkbox"/> <input type="checkbox"/> Builder</p> <p><input type="checkbox"/> <input type="checkbox"/> Electrician</p> <p><input type="checkbox"/> <input type="checkbox"/> Decorator</p> <p><input type="checkbox"/> <input type="checkbox"/> Cabinet Maker</p> <p><input type="checkbox"/> <input type="checkbox"/> Painter</p> <p><input type="checkbox"/> <input type="checkbox"/> Referral Bonus</p> <p><input type="checkbox"/> <input type="checkbox"/> Blank Bonus</p>
<p>Cory & Sara Cahn 116 Charleston Park Metairie, LA 70005</p>	<p>Sales Specialist: Jeff Edenfield System Designer</p> <p>President: Jeff Edenfield System Designer</p>	<p>In Progress Payment: \$7000.00</p> <p>Referral Bonus: \$0.00</p>	

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

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

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

Print/Preview: **Cost:** **Duplicate Quote** **Convert Invoice** **Costing Set Up** **Done**

Quotation
QT #7206

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	Other Defaults 1				Next	Done
CPS System Settings							
<p>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.</p> <p>Run CPS in Secure Mode</p> <p>Enable FileMaker Menus</p> <p>Please note: In order for this feature to work it is necessary to</p> <ol style="list-style-type: none"> 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 the SecureFM Plug In is checked. 							
<p>Open Print Setup</p> <p>Open File Sharing</p> <p>Set Spell Checker</p>		<p>SCREEN MAGNIFICATION</p> <p>300%</p> <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>			<p>WINDOW SETTINGS</p> <p>Maximize</p> <p>Maximize expands the CPS windows to the full computer screen.</p> <p>Recommended: 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	Purchase Order				Done
Print Store Copy	Duplicate PO		PO #16737	1/20/2016	Ship To: SHOP WAREHOUSE	Set Up	
VENDOR: House Gadget Stock 1402 8564 Washington Blvd Culver City, CA 90232			Work: 310-202-8083 Cellular: 310-736-7814		EME Audio & Video Systems 414 W Ridgemont Strum, WI 54770		
Reference Description:							
Need By	Reference #	Ship VIA	Invoice #	Terms	Buyer	OPEN	
				Standard Terms	Jim Engandela	QTY RCVD	QTY OPEN
Pick	QTY	unit	PRODUCT DESCRIPTION		PRICE	TOTAL	Pick
	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: SNEAKYLINE DRIVER: KNEKT MULTIROOM CONTROL: SNEAKYLINE		150.00	150.00	1
	3	ea	LINN: VALHALLA: LP 12 UPGRADES: POWER SUPPLY 33 RPM		285.00	855.00	3

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:	<input type="text"/>	Department:	<input type="text"/>	Product Tax: <input type="text"/>
Model:	<input type="text"/>	SKU#:	<input type="text"/>	No Labor Tax: <input type="checkbox"/>
Category:	<input type="text"/>	Location:	<input type="text"/>	
Description:	<input type="text"/>	Supplier:	<input type="text"/>	
Features:	<input type="text"/>	Parts:	<input type="text"/>	Phase: <input type="text"/>
				Favorite: <input type="text"/>
				Opt Qty: <input type="text"/>
				Qty Dif: <input type="text"/>
Unit:	<input type="text"/>	CALCULATOR	A% <input type="text"/>	B-shipping <input type="text"/>
Net Cost:	<input type="text"/>	<input type="text"/>	<input type="text"/>	% <input type="text"/>
Sell Price:	<input type="text"/>	<input type="text"/>	<input type="text"/>	% <input type="text"/>
List Price:	<input type="text"/>			
Installation:	<input type="text"/>	Min.Sec	Charge:	<input type="text"/>
				INSTALLED PRICE:
Specifications		Rack Spaces:	<input type="text"/>	
Finish:	<input type="text"/>	Dimensions: W	<input type="text"/>	H <input type="text"/>
Weight:	<input type="text"/>		D <input type="text"/>	
AC Power:	<input type="text"/>	Warranty:	<input type="text"/>	Base Wire \$: <input type="text"/>
DC Power:	<input type="text"/>	Install Notes:	<input type="text"/>	
Created:	<input type="text"/>	Find Products with or without Labor	Find Products without a Sell Price	
Modified:	<input type="text"/>			

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 Yes

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 (* - 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

Done

ACTIVE KELTIK SYSTEM

ACTIVE KELTIK SYSTEM WITH CD12, 5103 AND KLIMAX AMPLIFICATION

Total Set Price: \$20,000.00

Delete Subset

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		Pkg

→

→

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 Option is "No"

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 <input type="checkbox"/> Done <input type="checkbox"/>	Products: \$41,021.00	Install: \$1,925.00	Misc: \$7,551.05	Subtotal: \$50,497.05	
All Phases		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	Other Defaults 1				?	Next Done

CPS System Settings

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 Software Preferences (on this screen) and click on the Plug-In's tab and make sure that the **SecureFM Plug In** is checked.

Run CPS in Secure Mode

Enable FileMaker Menus

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.

Open Print Setup

Open File Sharing

Set Spell Checker

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	Proposal Debug Detail	Done	X accepted Sold NotSold	Reset Proposal Series Number						
Find All										
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		Selected Phase All Phases						
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										
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid black; padding: 2px;">1</td> <td style="border: 1px solid black; padding: 2px;">100100</td> <td style="border: 1px solid black; padding: 2px;">100000000000</td> <td style="border: 1px solid black; padding: 2px;">ZX</td> <td style="border: 1px solid black; padding: 2px;">100100</td> <td style="border: 1px solid black; padding: 2px;">100100628834</td> </tr> </table>					1	100100	100000000000	ZX	100100	100100628834
1	100100	100000000000	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.

CHANGE ORDER

A	2 hr PAV - EXTRA LABOR - LABOR	0.00
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 & Materials:	85.75
Sub Total:	\$1,796.25
Tax:	100.59
Grand Total:	\$1,896.84

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
			1237-00 v1				Y	Y	Y	Y	
			P=Proposed C=Changed A=Added D=Deleted								
			CO#	Class	Qty	Make	Model	Category-Description			
	THEATER	<input type="checkbox"/>	P		1 ea	PAV - EXISTING	PREAMP - SURROUND SOUND				
	THEATER	<input type="checkbox"/>	P		1 ea	PAV - EXISTING	5 CH AMP - EXISTING EQUIPMENT				
	THEATER	<input type="checkbox"/>	P		1 ea	PAV - EXISTING	BLU-RAY DVD - BLU-RAY DVD				
	THEATER	<input type="checkbox"/>	P		1 ea	PAV - EXISTING	GAME CONSOLE - VIDEO GAME				
	THEATER	<input type="checkbox"/>	P		1 ea	PAV - EXISTING	HD CABLE BOX - CABLE BOX				
	THEATER	<input type="checkbox"/>	P		2 ea	SONOS - CONNECT	ZONE PLAYER 90 OFF WHITE				
	THEATER	<input type="checkbox"/>	P		4 ea	SONOS - CONNECT	AMP - ZONE PLAYER 120 OFF				
	THEATER	<input type="checkbox"/>	P		1 ea	SPEAKERCRAFT	VITAL 850 - 8 CH AMP BLACK				
	THEATER	<input type="checkbox"/>	P		1 ea	UNIVERSAL REMOTE	MX890 - RF COLOR				
	THEATER	<input type="checkbox"/>	P		1 ea	UNIVERSAL REMOTE	MXIOS-MRX-KIT -				
	THEATER	<input type="checkbox"/>	P		2 ea	BINARY - B3-AUD-2	ANALOG AUDIO 2M GREY				
	THEATER	<input type="checkbox"/>	P		1 ea	COOL COMPONENTS	TCALTV2 - TEMPERATURE				
	THEATER	<input type="checkbox"/>	P		1 ea	COOL COMPONENTS	VS-HFB - DUAL FAN BLACK				
	THEATER	<input type="checkbox"/>	P		1 ea	PANAMAX - M5100PM	POWER CONDITIONER				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	P		1 ea	CROWN - CDI1000	AMPLIFIER BLACK				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	P		2 ea	SONOS - CONNECT	ZONE PLAYER 90 OFF WHITE				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	P		8 ea	EPISODE - EA-MR-COMM-SPKT-25	70VOLT TAP				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	P		1 ea	PANAMAX - PM8AV	surge protector GREY				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	P		2 ea	BINARY - B3-AUD-1	ANALOG AUDIO 1M GREY				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	P		2 ea	RDL - 7002	CONVERTER BLACK				
	THEATER	<input type="checkbox"/>	A		2 hr	BINARY - B6-HD-1	SERIES 6 HDMI 1M BLACK				
	THEATER	<input type="checkbox"/>	A		1 hr	PAV - SERVICE REPAIR	SERVICE REPAIR				
	THEATER	<input type="checkbox"/>	A		1 set	WYRESTORM - EX-1UTP-IR-40	HDMI EXTENDER				
	THEATER	<input type="checkbox"/>	A		1 ea	XANTECH - CC12	REMOTE RELAY BLACK				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	A		110 ft	GENESIS CABLE - CAT5E BLUE	CAT5E BLUE				
	BALLROOM/BAR 3RD	<input type="checkbox"/>	A		2 hr	PAV - EXTRA LABOR	LABOR				
	OFFICE	<input type="checkbox"/>	A		1.5 hr	PAV - EXTRA LABOR	LABOR				
	SWIMMING POOL	<input type="checkbox"/>	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.

Print/Prev 1 2 3
Duplicate Purchase Order
Set Up Done

Purchase Order

Vendor:
 Panasonic Canada
 5770 Ambler Drive
 Mississauga, ON L4W 2T3

1/19/2005

Work: 905-238-2237
 Returns 1-800-517-1101
 Cellular: 416-817-3996
 Fax: 905-238-2314

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

Reference Description:

Need By	Reference #	Ship VIA	Invoice #	Terms	Buyer
1/28/2005	ENNS				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			
Click on Area to show only that Area			View	Delete	Pick	Qty	Make	Model	Unit	Unit Sell	Total Sell	Unit List	Total List
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	USA400	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	ARMSTRON	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		PURCHASE ORDERS																								Done		
		click on purchase order to view																										
#	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 Lab				Open	\$0.00																					
PO #3319		Runco				Open	\$495.00																					
PO #3181		McIntosh Lab				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		1/11/2011	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 & Hide Status"

"Optimize Windows & 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.

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

CPS System Settings

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.

Run CPS in Secure Mode

Enable FileMaker Menus

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.

Open Print Setup

Open File Sharing

Set Spell Checker

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

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.

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),

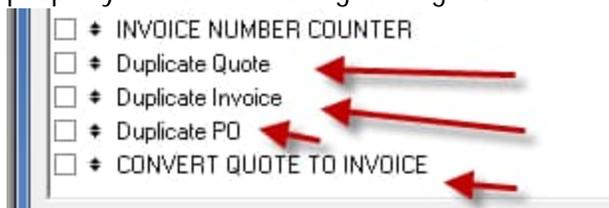
If(CALC FLAG SELL="List Price -A%",

(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.



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 **Invoice** Costing Done
 Cost: Packing List: Duplicate Sales Invoice SI #1042 Set Up

Address 1: Rocky Buldo AVID Work: 404-871-5990 P.O. Box 768802 Roswell, GA 30076 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	B/O Qty					
12/30/12						1
	1					2
	1	1	1	1	1	-2
						3

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

1	ea	ADVENT - AW810 - SPKR WIRELESSOUTDOOR WATER-RESISTANT		129.99	129.99	T
3	ea	AIWA - CADW635 - PORT STEREO3PC 10W DIGITAL RC Q-SUR		139.95	419.85	T
4	ea	AIWA - TSW60 - SUBWOOFER120W AMPLIFIER 8		200.00	800.00	T
3	ea	LINN - AV 5110 LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER -		325.00	975.00	T

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 Strum, WI 54770
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PACKING LIST
 SI #1042
 6/14/1999
 Permit: 1234

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

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
	1	1 ea	ADVENT - AW810 - SPKR WIRELESSOUTDOOR WATER-RESISTANT
	2	3 ea	AIWA - CADW635 - PORT STEREO3PC 10W DIGITAL RC Q-SUR
	-2	4 ea	AIWA - TSW60 - SUBWOOFER120W 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 CLNTCOMPANY
 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.

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: 1	Make: LINN	Department:	SKU#:	Location:	Supplier: LINN PRODUCTS
Model: KEILIDH AKTIV (3-WAY) -	Category: CHERRY/ROSENUT	Parts:	Tax: T		
Description: CHERRY/ROSENUT (INC. AKTIV)	Features: Versatile floor-standing loudspeaker delivering an outstanding level of performance and value with a wide range of source, control and playback	Phase: 0			Placement: n

Detail List	Product Utilities	All 14	Proposal Products		Find Replace	Proposal Areas	Done					
		Sort	Jim Engandela - Horizon Software									
Click on Area to show only that Area		View	Delete	Pick	Unit	Total	Unit	Total				
		↓ Add	↓ Place	↓ Qty	Make	Model	Unit	Sell	Sell	Unit	List	Total
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	2,200.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	EKOS	ea	2695.00	2695.00	2,695.00	2,695.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	IKEMI	ea	3595.00	3595.00	3,595.00	3,595.00	
On DEN	☒ ☑	☒	☒	☒	4 LINN	K600 CABLE	m	34.00	136.00	34.00	136.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	KEILIDH AKTIV	pr	2020.00	2020.00	2,020.00	2,020.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	KEILIDH/KABER	pr	230.00	230.00	230.00	230.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	KOLEKTOR	ea	990.00	990.00	990.00	990.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	LINGO	ea	1550.00	1550.00	1,550.00	1,550.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	LINTO	ea	1600.00	1600.00	1,600.00	1,600.00	
On DEN	☒ ☑	☒	☒	☒	3 LINN	LK 85	ea	895.00	2685.00	895.00	2,685.00	
On DEN	☒ ☑	☒	☒	☒	4 LINN	SILVER	pr	300.00	1200.00	300.00	1,200.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	SONDEK LP-12 -	ea	1875.00	1875.00	1,875.00	1,875.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	TRAMPOLIN	ea	245.00	245.00	245.00	245.00	
On DEN	☒ ☑	☒	☒	☒	1 LINN	5101 PERSONAL	ea	390.00	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.

The screenshot shows a software interface for an Invoice. At the top, there are buttons for 'Print/Prev 1', '2', '3', 'Costing', 'Set Up', and 'Done'. Below these are 'Cost:', 'Packing List:', and a highlighted 'Duplicate Sales Invoice' button with a red arrow pointing to it. The main area contains fields for 'Vendor' (Capitol Sales Company, 3110 Neil Armstrong Blvd., Egan, MN 55121), 'Address 2' (Capitol Sales Company), 'Work' (800-467-8255), and 'Fax' (800-440-4077). There are also fields for 'Reference Description', 'Ship VIA', 'Payment', 'Terms', 'Your #', 'Proposal #', and 'Sales Rep'. At the bottom, there is a table with columns: 'Pick', 'QTY', 'unit', 'PRODUCT DESCRIPTION', 'Install min. sec', 'PRICE', and 'TOTAL'. The table contains one row: '1 ea LINN: 5101 PERSONAL HANDSET : XXXX: ACCESSORIES: UNIVERSAL' with a price of 390.00 and a total of 390.00.

Purchase Order PO #1056

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

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

11/17/2012

Ship To: SHOP WAREHOUSE
EME Audio & Video Systems
414 W Ridgemoat
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 900MHZ4 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.

Invoice SI #1042

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

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

Pick	QTY	unit	PRODUCT DESCRIPTION	Install min sec	PRICE	TOTAL	Tax	Packing List Delivered				B/O Qty	
								12/30/12	Date Qty	Date Qty	Date Qty		
	1	ea	ADVENT - AW810 - SPKR WIRELESSOUTDOOR WATER RESISTANT		129.99	129.99	T						1
	3	ea	AIWA - CADW635 - PORT STEREO3PC 10W DIGITAL RC Q-SUR		139.95	419.85	T	1					2
	4	ea	AIWA - TSW60 - SUBWOOFER120W AMPLIFIER 8		200.00	800.00	T	1	1	1	1	1	0
	3	ea	LINN - AV 5110LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER -		325.00	975.00	T	3					0

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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

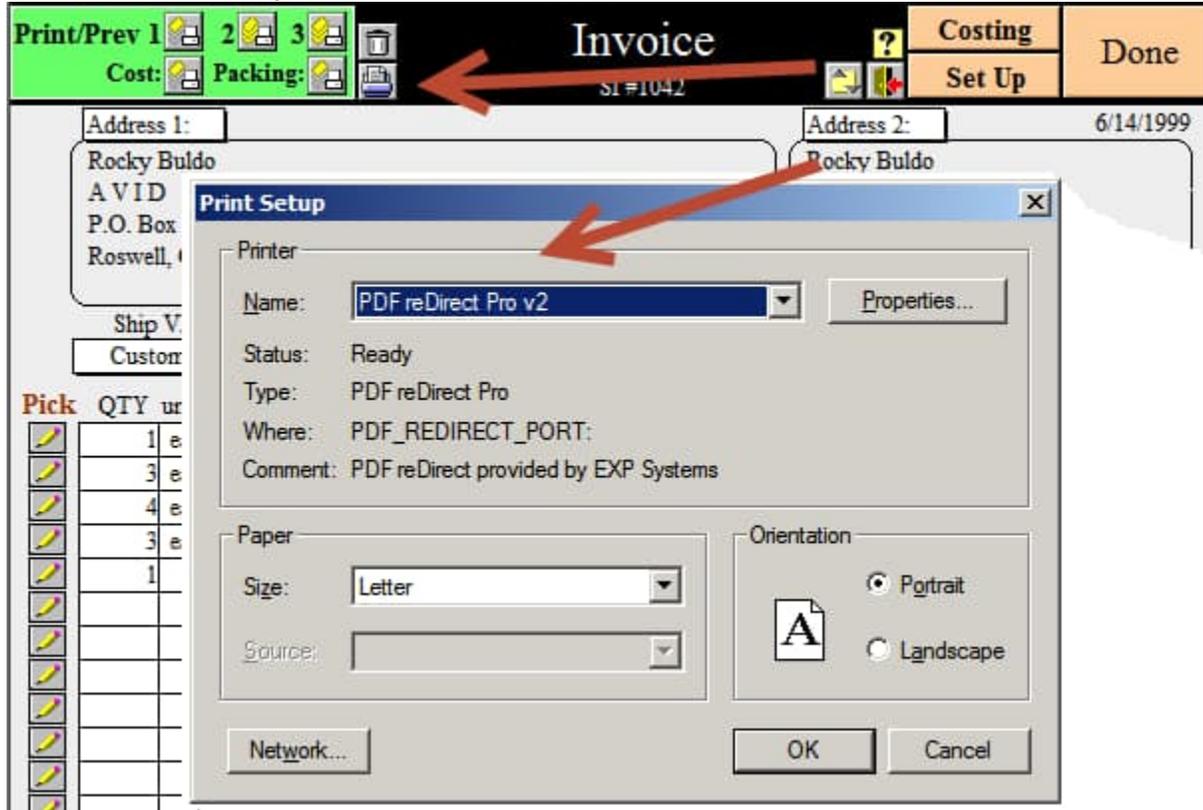
Address 2: Rocky Buldo AVID

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

Delivered Dates & Qty		B/O Qty	QTY SOLD	PRODUCT DESCRIPTION
12/30/12			1	ADVENT - AW810 - SPKR WIRELESSOUTDOOR WATER RESISTANT
			2	AIWA - CADW635 - PORT STEREO3PC 10W DIGITAL RC Q-SUR
	1	1	4	AIWA - TSW60 - SUBWOOFER120W AMPLIFIER 8
	3		3	LINN - AV 5110LOCAL SPEAKER - SMALL FULL-RANGE SPEAKER - BLACK/WHITE
			5	AIWA - HSTA193 - PERS STEREOANALOG SUPER BASS 2ZHR

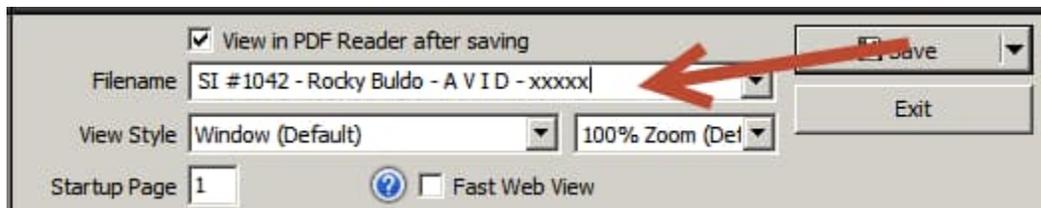
Enhancement – POS: Printer Setup button

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.

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 Ridgemont 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 [X]

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

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		Capital 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

Import CPS Excel Product Worksheet

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

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, Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Decimals

Styles: Conditional Formatting, Format as Table, Styles

A	B	C	D	E	F	G	
1	MAKE	MODEL	SKU NUMBER	DEPARTMENT	CATEGORY	DESCRIPTION	PRODUCT TEXT
2							
3							

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.

Export Contacts with Options Find the Contacts you want to Export and then click this button.
 Enter File Name
 Set "Save as Type" to .tab, .csv, .dbf (includes field labels)
 Save in desired location
 Add/Clear Export Fields if desired
 Click "Export" at Field Map screen

Export Contacts to Pilot

Export Contacts to WinFax

Export Contacts to Outlook

Print Instructions

Add Horizon Contact

Add Capitol Contact

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

Define Fields for "cps.Proposal.fp5"

1515 field(s)

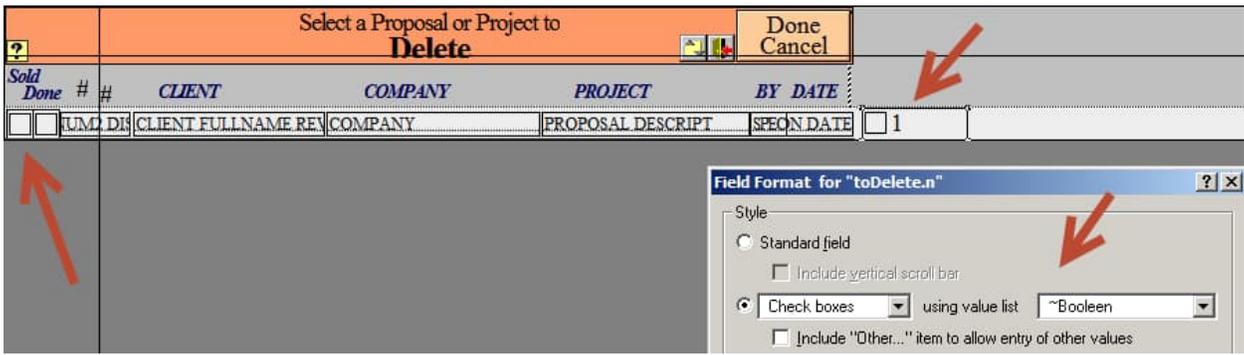
Field Name	Type	Options
LABOR 6 RATE H...	Calculation	= Case(LABOR 6 SUBTOT...
zi.foundCount.c	Calculation	Unstored, = Status[CurrentF
zi.recCount.c	Calculation	Unstored, = Status[CurrentF
zx.changeAreaStore	Global	Text
zx.changeAreaNu...	Global	Text
zx.changeZoneSt...	Global	Text
zx.changePlaceSt...	Global	Text
zf.deleteTag	Number	
zi.zf.deleteTagWit...	Calculation	Indexed, = Case(zf.deleteTa
propWoAreaText	Text	
toDelete.n	Number	Indexed

Field Name: toDelete.n

Download file:
www.horizon-software.com/download/cpsDeleteAll.zip

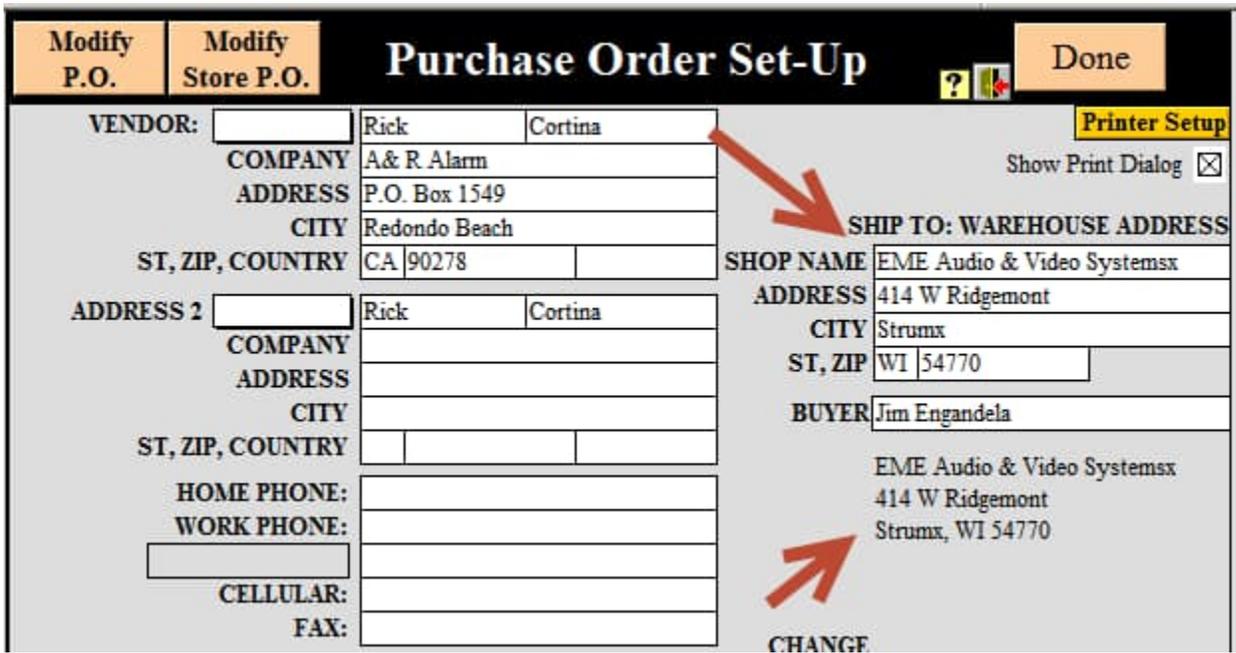
Import Import Delete script from this file
 util.deleteAllProposals

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



Enhancement – POS/Purchase Orders: Change Ship To Address

You can now change the POS Purchase Order, Ship To Address by manually entering it into the POS Purchase Order Setup screen. The default Ship To Address comes from your Setup Preferences.



Enhancement – Proposals: Work Order Area Text

You can now enter Text into the Change Area Name screen specifically for Areas in the Installation Work Order reports.

Pick Text	Add to Text Library Clear Area Text	Change Area Name Capitol Sales Company	Spell Check Text Ruler	Done
	ZONE: 0	AREA: EXERCISE ROOM	Placement: n	
Text ID <input type="checkbox"/>	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: 98	AREA: DEN	Placement: n	
Text ID <input type="checkbox"/>	This proposal represents a design carefully prepared with your requirements, our experience and industry standards all balanced to form a workable plan.			
Keep text within field	SCOPE OF WORK 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.			

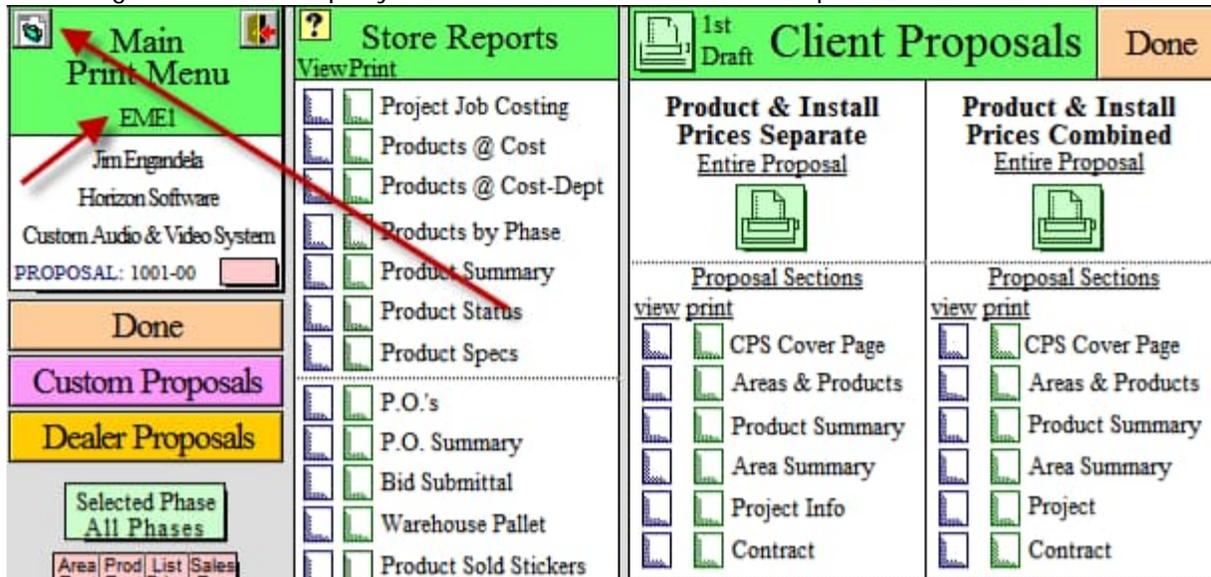
Version 7.9v32

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

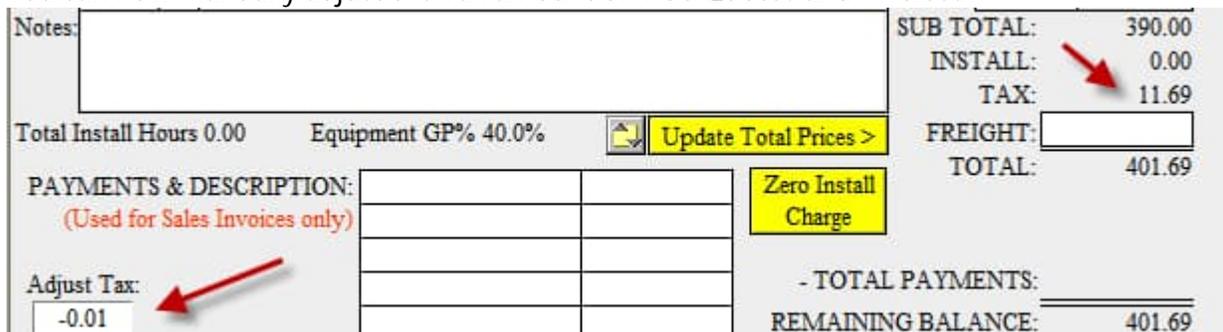
Fix – Multi-Company Option: Change Company from Proposal Print Menu

Switching Companies from the Proposal Print Menu 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.



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

4/12/2000 Ship To: SHOP WAREHOUSE

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

Message: Show All Vendors or only This Vendor.

Buttons: This, All

Buttons: Print/Prev 1, 2, 3, Print Store Copy, Set Up, Done

Pick	QTY	unit	PRODUCT DESCRIPTION	PRICE	TOTAL

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

Work Order Detail

Buttons: 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

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/ROSENU (INC.)

Buttons: Create POS Work Request (WR #1069)

Print/Prev 1 2 3		Work Request WR #1069		Set Up	Done
Jim Engandela S. 15700 Hwy U. Strum, WI 54770 Work: 715-287-3335 Fax: 715-287-4464			12/6/2010		
Project # <input type="text" value="100300"/>		Project Work Order # <input type="text" value="200609"/>		<input type="button" value="Proj WO"/>	
Work Requested					
Hours Quoted <input type="text"/> COD <input type="text"/> Appt Date <input type="text"/> Time <input type="text"/> Confirmed day prior <input type="checkbox"/> Hourly <input type="checkbox"/> Piece <input type="checkbox"/>					
Installers Notes					
Equipment Needed					
Start Time	Lunch Start	End	Finish	Total	Rate Amt
Installer <input type="text"/>			Work Completed <input checked="" type="radio"/> Yes <input type="radio"/> No Hrs to Complete <input type="text"/>		

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.

Preview Work Order		Print and Post		Work Order Detail		Modify Work Order	Done
First Name	Jim	Invoice	200607				
Last Name	Engandela	Proposal	100300				
Address	S. 15700 Hwy U.	Invoice Date	11/22/2010				
City	Strum	Posted Date					
State Zip	WI 54770	Other WO Labor Hours	<input type="text" value="7.00"/>				
Appointment Day	<input type="text"/>	Actual Start Date	<input type="text"/>	Reschedule	<input type="checkbox"/>		
Appointment Date	<input type="text"/>	Actual Start Time	<input type="text"/>	Shop Dept	<input type="text"/>		
Appointment Time	<input type="text"/>	Actual Stop Time	<input type="text"/>	Installer	<input type="text"/>		
		Actual Stop Date	<input type="text"/>	WO written by	<input type="text"/>		
Instructions	<input type="text"/>						

1003-00 Project Number 11/22/10	INSTALL WORK ORDER	200607 Invoice Number Page: 1
EME Audio & Video Systems		
Client: Jim Engandela	Warren Petryk - Audio & Video Specialist - Project Mgr	
Company: Horizon Software		
Project: Custom Audio & Video System	Phase: <u>All Phases</u>	Start Finish
Vendor: S. 15700 Hwy U. Strum, WI 54770	1 - Prewirex Phase	7-1-07
	2 - Trim Phase	8-1-07
	3 - Finish Phase	9-1-07
	4 - Training Phase	10-1-07
	5 - Follow-Up Phase	11-1-07
Home Phone: _____	Plate: _____	Product Labor: 4.00 Warranty: NO
Work Phone: 715-287-3335	Style: _____	Other Hours: 7.00 Charge: \$0
Cell Phone: _____	Color: _____	WO Total: 11.00 Pickup: NO
Fax: 715-287-4484	Grill Type: _____	Charge: \$0
Credit Approval: _____		
Pager: _____		
E-mail: _____		
Appoint Day <input type="text"/>	Actual Start Date <input type="text"/>	Reschedule <input type="checkbox"/>
Appoint Date <input type="text"/>	Actual Start Time <input type="text"/>	Shop Dept <input type="text"/>
Appoint Time <input type="text"/>	Actual Stop Date <input type="text"/>	Installer <input type="text"/>
Instructions	Actual Stop Time <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.

POS Utility	Print POS Invoice List	Point of Sale	Done
Create a new POS Invoice			
<div style="border: 1px solid black; background-color: yellow; padding: 5px; display: inline-block;"> Create a New POS Invoice </div>			
View Existing POS Invoices			
QUOTATIONS 	WORK ORDERS 	CHANGE ORDERS 	
SALES INVOICES 	SERVICE ORDERS 	PURCHASE ORDERS 	
ACCEPTANCE FORM 	WORK REQUEST 		

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	<input type="text"/> <input type="text"/> <input type="text"/>		
	Hours Quoted	<input type="text"/>	
Appt Date	<input type="text"/>	Time	<input type="text"/>
	<input type="checkbox"/>	Confirmed day prior	<input type="checkbox"/>
	<input type="checkbox"/>	Hourly	<input type="checkbox"/>
	<input type="checkbox"/>	Place	<input type="checkbox"/>
Installers Notes	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
Additional Equipment Needed	<input type="text"/> <input type="text"/>		
	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 to have their products included in your software.

Download CapitolSales_Items_1	<ol style="list-style-type: none">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.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.
Import CapitolSales_Items_1	

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 a software interface with a script editor on the left and a 'Specify Message' dialog box on the right. The script editor contains a list of commands, with red arrows pointing to specific lines: '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...', and 'Export Records [Restore, No dialog]'. The 'Specify Message' dialog box has a 'Message Text' field containing the same message text as the script, and 'Button Captions' fields for 'First (default)', 'Second', and 'Third', with 'OK' entered in the first field. 'OK' and 'Cancel' buttons are at the bottom right of the dialog.

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: Jim	Last Name: Engandela	Pick Contact: []	Proposal: 100300	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	ZIP:	54770	MOBILE:	
	COUNTRY:			PAGER:		
ADDRESS:	ADDRESS:			FAX:	715-287-4464	
	CITY:			E-MAIL:		
	ST:			REFERRED BY:		
	COUNTRY:					
PROJECT DESCRIPT:	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		Warehouse Pallet List		7/15/09 Page: 1		
3110 Neil Armstrong Blvd.				Proposal: 1001-10		
Egan, MN 55121				Project Mgr:		
EME Audio & Video Systems						
<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	LN - ARKIV - ACCESS CONTROL KEYPADS - MOVING-COIL CARTRIDGE	\$1,500.00	0	1	Good	
2	LN - EKOS - TONEARM BLACK	\$1,617.00	0	1	Good	
2	LN - IKEMI - COMPACT DISC PLAYER - REMOTE CONTROL CD PLAYER BLACK	\$2,157.00	0	1	Good	
8	LN - K600 CABLE - ACCESSORIES - TRI-WIRE SPEAKER CABLE/METRE	\$20.40	0	1	Good	
2	LN - KEILDH 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							
<i>Make</i>	<i>Model</i>	<i>Pkg</i>	<i>Category</i>	<i>Description</i>	<i>Price</i>	<i>View</i>	<i>Fav</i>																					
LINN	TUNE BOX	ACCESSORIES -	TO HOUSE	ACTIVE CARD -	100.00 ea																							
LINN	5101 PERSONAL	ACCESSORIES -	UNIVERSAL	LEARNING R -	390.00 ea																							

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

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.

RATES

Hourly	Cost	Sell	List
Install Labor:	\$50	\$70	\$80

Misc Parts Charge: 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%

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 Tax A is the primary tax; Tax B is an additional value tax. GST/PST
3. Compound tax 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.

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
 r 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, "CD-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	Purchasing	Proposal Detail	Pricing	Done
Areas	Work Orders	Michael Mavall 4444	Set Up	Change Orders
Products	Invoicing			

Selected Phase	Sold Done	Products: \$1
All Phases	<input type="checkbox"/>	HP: \$1

SYSTEM DESIGN This proposal r
BREAKROOM As part of this prop
 1 ea OMNI MOUNT - 54FB-T -
 1 ea PREMIUM INSTALLATIO
 1 ea PREMIUM INSTALLATIO
 1 ea PREMIUM INSTALLATIO
OFFICE This area includes the foll
 2 ea OMNI MOUNT - QM100-7
 2 ea PREMIUM INSTALLATIO
WORKSHOP As part of this propos
 1 ea OMNI MOUNT - 75/100 C
 1 ea PREMIUM INSTALLATIO
 1 ea PREMIUM INSTALLATIO
 1 ea PREMIUM INSTALLATIO

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	Add Client to Contacts	Done
Please use normal case text				

CLIENT:	Salutation	First Name
	House	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

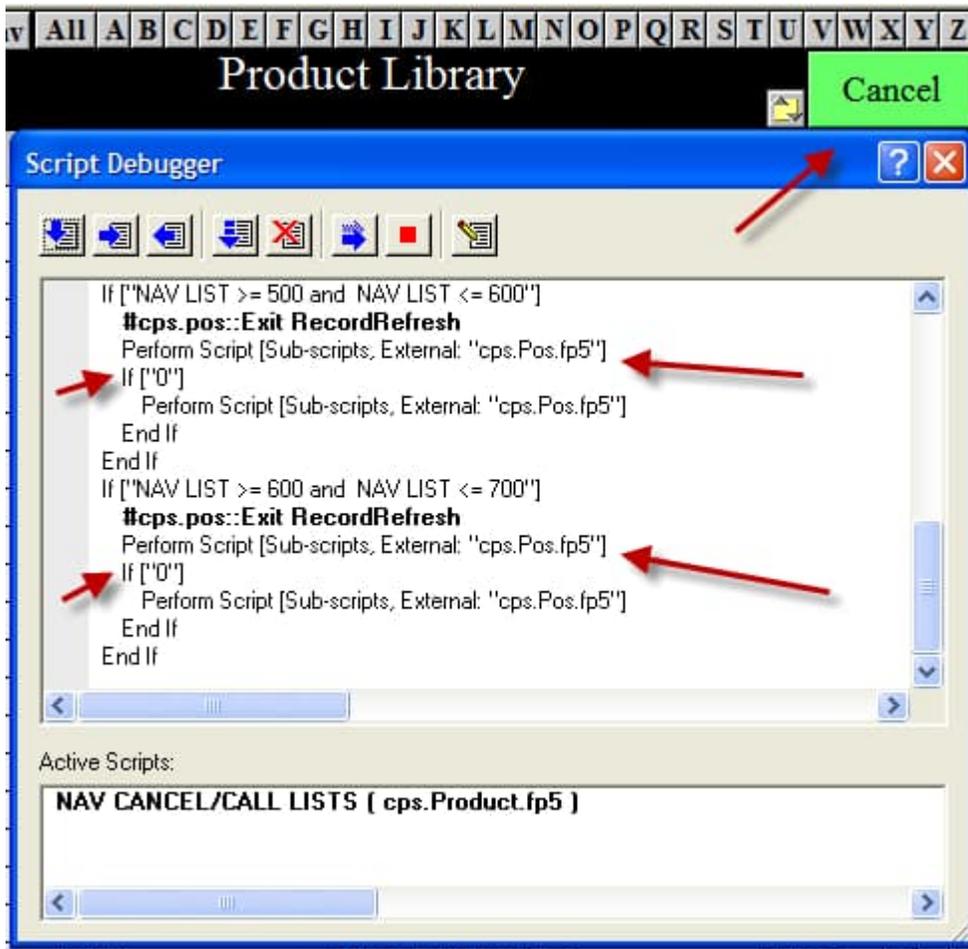
PROPOSAL DUE	
---------------------	--

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 Please use normal style text		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 Ridgemoor City: Strum State: WI Zip: 54770 Buyer: Jim Engandela		
<input type="button" value="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 <input type="checkbox"/> 2AB Option Tax Misc Parts? YES <input type="checkbox"/> 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 <u>not</u> 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 Michael Mayall		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			PAYMENT PLANS 100% Payment due upon delivery.		1,515.68 Sub Total: 1,467.85 Tax: 47.81 Grand Total: 1,515.66		
RATES 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 <input type="checkbox"/> 2AB Option Tax Misc Parts? YES <input type="checkbox"/> Tax Parts if Product is Exempt <input checked="" type="checkbox"/>			SERVICES 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		PRINT Show List Prices? <input checked="" type="radio"/> Show list prices and discount <input type="radio"/> Do <u>not</u> 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	
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
First Name	Jim	Invoice	200604			
Last Name	Engandela	Proposal	165600			
Address	S. 15700 Hwy U.	Invoice Date	9/5/2008			
City	Strum	Posted Date				
State Zip	WI 54770	Onsite Hours:				
Appointment Day	Monday	Actual Start Date	1-12-2008	Reschedule	<input type="checkbox"/>	
Appointment Date		Actual Start Time		Shop Dept		
Appointment Time		Actual Stop Time		Installer		
		Actual Stop Date		WO written by		
Instructions	Install Linn cable and remove Ademco in sitting room					
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.



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

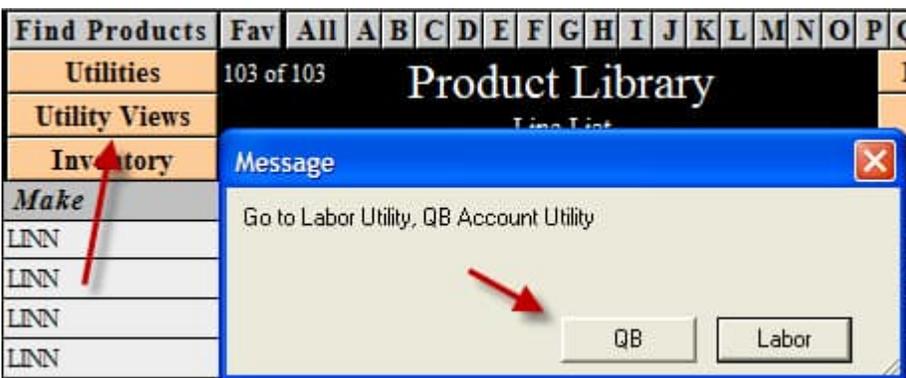
This file can be opened by Excel.



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	R	S	T	U	V	W	X	Y	Z
Update QB Accounts in Proposal & Projects		QB Accounts																							Done			
<p>Use only Alpha Numeric characters Account Names. Do not use special characters or dashes</p> <p>Entering QB accounts names will retain these accounts, otherwise they will be blank.</p> <p>Use the Replace button to auto enter your values into multiple products.</p> <p>Important: After changing Account Info. Run the Update QB Accounts button on this screen.</p>																												
Make	Model	Asset	Income	Cost Of Goods	Supplier																							
LINN	5101 PERSONAL	ASSET1	INCOM1	COGS1	LINN PRODUCTS																							
LINN	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.



Quickbooks Accounts		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		Asset: ASSET1
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.		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	Quickbooks Accounts					Unit Cost
			Supplier	Asset	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 Utilites/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

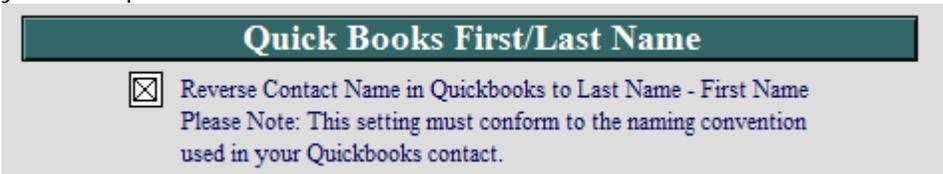
Speed up proposals and printing accuracy by storing these fields, with Local Subset spaces instead of related spaces from the Master Setup file.

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.

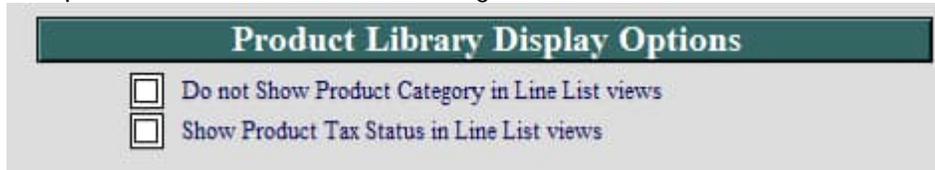
Fix – Secure FM.

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



The screenshot shows a window titled "Product Library Display Options". It contains two checkboxes with the following labels:

- 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



The screenshot shows a window titled "Proposal Report Options". It contains one checkbox with the following label:

- 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.

```
■ #create new line items for labor & misc totals
#SICreateAndPopNewLineItem Product Labor
# If ["qlabor.laborProdSubtotal.g > 0"]
#   Set Field ["\Invoice_CurrentRecordID", "qlabor.sysRecId.g"]
#   Perform Script [Sub-scripts, External: "cps.Invoices.fp5"]
# End If
```

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: fffrr			
Identifier: rrrrr					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
		Jim Engandela - Horizon Software			View Invoices	WO	SI	
Project Labor & Misc Totals		1003-00 v1			Auto Set Invoice Qty			
Product Install Labor		\$2,870.00			Clear All			
Installation		\$330.00						
Engineering		\$0.00			Selected Phase			
Travel		\$0.00			All Phases			
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 & 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.

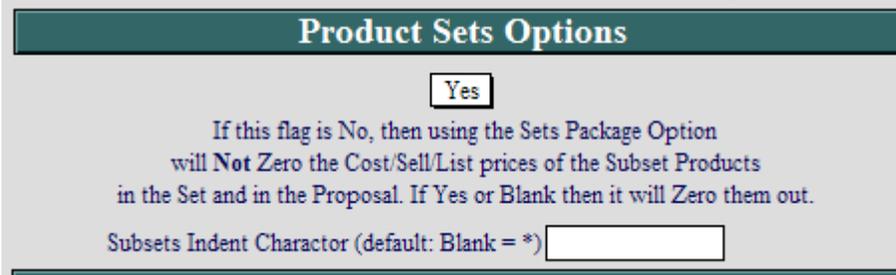
Version 7.8 v13

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 1st 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 1st blank record being created when you create the 1st 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 2nd 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 2nd 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 Salesmans 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.

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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.

Version 6.1v1

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.

Version 6.0v5

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(AREA, 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 1st 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 1st 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 1st 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.

4

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” 1st 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,ZEXTRAg1)

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:
$$\text{SUBT PLP S EQUIP} = \text{Subtotal Eq Sell} + ((\text{Unit Labor Subtotal}/60) + \text{Installers Msc Labor})$$
$$* \text{round}(\text{Z Labor Rate Sell}, 2) + (\text{Specialist Msc Labor} * \text{round}(\text{Z Labor Rate Sell}, 2))$$

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 fit 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.

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.