



2021 YTD SmartPartner Upgrade Details

New Features, Enhancements and Fixes

Hello SmartPartners,

Our commitment to continual improvement brings the SmartPartner Software closer to perfection.

Please distribute this document to all SCPS users in your company, so they can benefit from these improvements.

Contact Horizon if you need assistance with upgrading or implementing your SmartPartner software.

We encourage you to upgrade now.

Download the latest SCPS Version

<http://files.horizon-software.com/SCPSuserup.zip>

SCPS Upgrade Install Guide

http://files.horizon-software.com/SCPS_Upgrade_Guide.pdf

Thank you

Jim Engandela

President/Developer

Horizon Software

Phone: [715-287-3335](tel:715-287-3335)

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Web: www.horizon-software.com

Current SCPS 15.2v3 Features & Enhancement Details

Project Manager: Add Tax to Job Costing Module

- Improve Global Project Manager GUI
- Add Printer Driver Display



- Add Final CO and Master Project Tax and Grand Totals
- Add Master Project Indicator
- Clear Master Project Totals for Projects without Final CO's

Find Projects

Project Manager - Project Job Costing

Print

Home

All

A

B

C

D

E

F

G

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J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Administrator

Manager

User

19 Projects

Done

Proj Cost

Proj Cost

Pymts

Number

User

Project Owners

Original Project

All Finalized CO's

Master Project w/CO's

Average Total GP%

GP%

Project: 3032.3-1.104

Project Title: Custom Integrated System

Client: Slater, Sam

Date Sold: 1/4/2021

Equipment

Labor

Parts

Wire & Cable

Expenses and

Total

Tax

Grand Total

\$63,575.18

\$1,855.00

\$40,458.58

\$0.00

\$4,337.60

\$138.00

\$3,364.91

\$21,781.58

\$111.30

\$21,892.88

\$133,517.85

\$2,104.30

\$135,622.15

\$4,367.36

\$124.56

\$4,219.69

\$137,885.21

\$2,228.86

\$139,841.84

View this Project

Job Costing Reports

Master Project with Final Change Orders

Project: 3031.2-1.105

Project Title: Theater, AV, and Networking

Client: Brown, Ivan

Date Sold: 12/8/2020

Equipment

Labor

Parts

Wire & Cable

Expenses and

Total

Tax

Grand Total

\$121,224.20

\$7,358.16

\$28,510.08

\$3,720.28

\$4,261.18

-\$549.00

\$3,712.18

\$4,650.90

\$3.57

\$4,654.47

\$13,063.37

-\$190.93

\$12,872.44

\$171,709.73

\$10,342.08

\$182,051.81

\$7,839.77

\$425.80

\$8,033.55

\$179,549.50

\$10,767.87

\$190,085.36

View this Project

Job Costing Reports

Master Project with Final Change Orders

Project: 3030.1-1.104

Project Title: Koha -106 Laconia

Client: Maloney, Jerry
Halyard Builders

Date Sold: 12/9/2020

Equipment

Labor

Parts

Wire & Cable

Expenses and

Total

Tax

Grand Total

\$768,183.54

\$36,002.05

\$249,814.83

\$1,559.00

\$26,921.68

\$3,762.00

\$30,683.68

\$23,009.36

\$3,150.00

\$33,043.86

\$60,237.64

\$60,237.64

\$1,138,167.54

\$38,239.55

\$1,176,406.61

\$51,205.54

\$2,487.41

\$51,826.84

\$1,189,372.60

\$40,726.96

\$1,228,233.45

View this Project

Job Costing Reports

Master Project with Final Change Orders

Project: 3028.2-1.103

Project Title: 156a Haverhill Street

Client: Charon, Brian
Silver Phenix Construction

Date Sold: 11/16/2020

Equipment

Labor

Parts

Wire & Cable

Expenses and

Total

Tax

Grand Total

\$60,241.90

\$30,555.00

\$4,416.35

\$4,089.74

\$11,897.63

\$111,200.62

\$4,296.75

\$115,497.37

View this Project

Job Costing Reports

- Modify Report to reflect Tax and Grand Totals

Project Manager Project Job Costing

	Number	Rep		Original Project	All Finalized CO's	Master Project w/CO's	GP%
● Project:	3032.3-1.104		Equipment	\$63,575.18	\$1,855.00	\$65,430.18	
Project Title:	Custom Integrated System		Labor	\$40,458.58	\$0.00	\$40,458.58	
Client:	Slater, Sam		Parts	\$4,337.60	\$138.00	\$4,475.60	
			Wire & Cable	\$3,364.91		\$3,364.91	
Sold Date:	1/4/2021		Expenses and	\$21,781.58	\$111.30	\$21,892.88	
			Total	\$133,517.85	\$2,104.30	\$135,622.15	
		Master Project with	Tax	\$4,367.36	\$124.56	\$4,219.69	
		Final Change Orders	Grand Total	\$137,885.21	\$2,228.86	\$139,841.84	
● Project:	3031.2-1.105		Equipment	\$121,224.20	\$7,358.16	\$128,582.36	
Project Title:	Theater, AV, and Networking		Labor	\$28,510.08	\$3,720.28	\$32,230.36	
Client:	Brown, Ivan		Parts	\$4,261.18	-\$549.00	\$3,712.18	
			Wire & Cable	\$4,650.90	\$3.57	\$4,654.47	
Sold Date:	12/8/2020		Expenses and	\$13,063.37	-\$190.93	\$12,872.44	
			Total	\$171,709.73	\$10,342.08	\$182,051.81	
		Master Project with	Tax	\$7,839.77	\$425.80	\$8,033.55	
		Final Change Orders	Grand Total	\$179,549.50	\$10,767.87	\$190,085.36	
● Project:	3030.1-1.104		Equipment	\$768,183.54	\$36,002.05	\$804,185.59	
Project Title:	Koha -106 Laconia		Labor	\$249,814.83	-\$1,559.00	\$248,255.83	
Client:	Maloney, Jerry		Parts	\$26,921.68	\$3,762.00	\$30,683.68	
	Halyard Builders		Wire & Cable	\$33,009.36	\$34.50	\$33,043.86	
Sold Date:	12/9/2020		Expenses and	\$60,237.64		\$60,237.64	
			Total	\$1,138,167.06	\$38,239.55	\$1,176,406.61	
		Master Project with	Tax	\$51,205.54	\$2,487.41	\$51,826.84	
		Final Change Orders	Grand Total	\$1,189,372.60	\$40,726.96	\$1,228,233.45	
● Project:	3028.2-1.103		Equipment	\$60,241.90			
Project Title:	156a Haverhill Street		Labor	\$30,555.00			
Client:	Charon, Brian		Parts	\$4,416.35			
	Silver Phenix Construction		Wire & Cable	\$4,089.74			
Sold Date:	11/16/2020		Expenses and	\$11,897.63			
			Total	\$111,200.62			
			Tax	\$4,296.75			
			Grand Total	\$115,497.37			

POS/Add Invoice: Change Contact Option

- When creating a new POS Invoice you now have the option to Pick any of the 8 People for that Contact

Create a New POS Invoice

12769387

7204 ?

EME

audio & video

User: Jim Engandela

Location: 1 - EME Audio & Video

Home

Info

Title

Pick Contact

eMail

President	Mr.	Hayes Callahan	horizon@trivest.net1
CAD Operator	Mister	Fred Smith	horizon@trivest.net2
Office Manager	Mrs.	John Arlpril	horizon@trivest.net3
CAD Operator	Ms.	Mary Sonlin	horizon@trivest.net4
Office Manager	Miss.	Todd Breckinworth	horizon@trivest.net5
CAD Operator	Mr. & Mrs.	Bruce Toma	horizon@trivest.net6
Office Manager	Dr.	Bob Marminal	horizon@trivest.net7
CAD Operator	Dr. & Mrs.	Kevin Hansen	horizon@trivest.net8

Pick Invoice for

Hayes Callahan

Company

horizon@trivest.net1

Switch Contact

Quotation	Work Order
Sales Invoice	Service Orders Repair & OnSite with RMAs
Change Order	Purchase Order
Credit Memo	Return Authorization

Product Library/Entities: Improve Entity Calcs and Screen GUI

Sort User

Master Prefs - Users

Users must have a Location, First Name and Last Name, an Employee Number and a Password
Employee Numbers must be unique within each Location

Users | InActive | Log

Add User DeActivate ReAssign

Company Location	First Name	Last Name	Initials	User AlphaNumber	Job Title	Access Rights	Login Password	User Level	Assign Project Managers and Engineers to Users
1	Dave	Dowling	SR	51	CAD Operator		DD	Manager	Jon Oster
	Phone Ext	Mobile #	715-234-5986	Email	horizondd@triwest.net	Administrator	Engineer	Jim Engandela	
1	Jim	Engandela	JE	100	President		JE	Manager	
	Phone Ext	124	Mobile #	715-287-3335	Email	Administrator	Engineer	Jon Oster	
2	Sandy	Engandela	SE	101	Office Manager		SE	Manager	
	Phone Ext	Mobile #	715-287-3456	Email	horizonse@triwest.net	User	Engineer	Jon Oster	
1	Jon	Oster	JO	45	Sales Manager		JO	Manager	
	Phone Ext	Mobile #		Email		Manager	Engineer	Jon Oster	

Clear Log 259 **Master Prefs - User Log**

30,000 Characters before Log Clears

Users | InActive | Log

Date - Time - User - User # - Location # - Location

Log In: 8/14/2021 6:29 pm User: Sandy Engandela #101 Location # 2 - Horizon
 Log Out: 8/14/2021 6:29 pm User: Jim Engandela #100 Location # 1 - EME Audio & Video Systems
 Exit SCPS: 8/14/2021 6:30 pm User: Sandy Engandela #101 Location # 2 - Horizon

Proposal Reports: Change Headers to Blue and Align



Dear Jim Engandela,

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. EME'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.

Our best designs are the result of strong partnerships. When we take your ideas and partner them with our quality products and professional execution the results are always beyond expectations.

You will find our proposals to be very complete and well thought-out. We always specify everything in straightforward terms and in writing. No hidden costs or surprises. Changes are only made upon your written authorization.

Your house represents a substantial, long-term investment for you. The investment in quality audio and video electronics can greatly increase the enjoyment of your home for many years to come.

Please let me know how I can help make your ideas become reality.

Sincerely,

Jim Engandela
President
Mobile: 715-287-3335



Home Entertainment System
for Jim Engandela Horizon Software



Dear Mr. Jim Engandela,

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. EME'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.

Our best designs are the result of strong partnerships. When we take your ideas and partner them with our quality products and professional execution the results are always beyond expectations.

You will find our proposals to be very complete and well thought-out. We always specify everything in straightforward terms and in writing. No hidden costs or surprises. Changes are only made upon your written authorization.

Your house represents a substantial, long-term investment for you. The investment in quality audio and video electronics can greatly increase the enjoyment of your home for many years to come.

Please let me know how I can help make your ideas become reality.

Sincerely,

Jim Engandela
President
Mobile: 715-287-3335

Proposal Fees: Speed up screen processing

Fees totals are now posted instead of calculated, so that users with a large number of fees can access all Fees screens more quickly.

Click on the ReCalculate button after Picking or Changing a fee, so that the Totals will be updated.

Even if you don't manually update the Fees, The Fees Totals will be automatically updated when you leave the Fees screen.

fees.additional

Proposal - Project Fees

Replace All Fees with Default Fees

Jim Engandela
Horizon Software
Home Entertainment System
1293.1-1.100

Fees Summary

Fees Total with Tax

Print ? Home

Done

Projects

Services

Expenses

New Fee

Project Fees

ReCalculate

Sort	Pick	Project Fee Type	Phase	Description	Fee Type	Percentage	Percent of	%	Flat Fee	Cost %	Tax Status	A	B	C	Fee Total	Direct Fee to Parts Subtotal	Delete
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Administration & Documentation	2		Flat Fee			%	\$100.00	50	%	E	E			\$100.00	<input checked="" type="checkbox"/>
				Digital Photos of the prewire and final installation taken, cataloged and													
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Design/Engineering	1		Flat Fee	Total Labor	10.0	%	\$1,000.00	40	%	E	E		\$1,000.00		<input type="checkbox"/>
				Design and Engineering of the following electronic systems: Home													
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Misc Parts & Materials	1		Percentage	Grand Total	1.5	%		50	%	E	E		\$413.76		<input type="checkbox"/>
				Misc Parts and Materials required to complete the installation.													
<input type="checkbox"/>	<input type="checkbox"/>	Project Management	3		Percentage	Total Labor	12.0	%		50	%	E	E				<input type="checkbox"/>
				Meetings designed to facilitate the seamless integration of the electronic													
m	<input checked="" type="checkbox"/>	Credit Card Convenience Fee	1		Percentage	Grand Total	3.0	%			%	T	T	T	\$827.52		<input type="checkbox"/>
m	<input type="checkbox"/>	Shipping & Freight Costs	1		Percentage	Equipment	1.5	%			%	T	T	T			<input type="checkbox"/>

Proposal/Project/Status screen: Rearrange Buttons

Discipline	Area	Phase	Proposal - Detail by Area				Utilities	Home		
Client	Areas	Fees	Jim Engandela Horizon Software Home Entertainment System 1293.1-1.100				Pricing	Invoicing	Leave	
Project	Info	Products					Area Text	Payments	Purchasing	Tracker
Contacts	Log	Supplements					Overviews	Install Notes	Work Orders	Print Menu
Client Mode <input type="checkbox"/>	Super Views	QVE					QVC	QVP	Status: Progress	Convert to Project
Discipline : Category : Type			Qty	Make : Model : Sku	Description	Finish	Grand Total			
Home Entertainment System										
Bungalow							\$10,595.00			
Audio : Speak : Powered Su		2 ea	Klipsch : RSW-10		Reference Subwoofer	Black	2,000.00			
Audio : Multi : Keypad		1 ea	Linn : 5101 Personal Handset		Universal learning remote	Black	600.00			
Video : Displ : DLP Video		1 ea	Runco : CL-610		DLP Projector		7,995.00			

Proposal - Status

Jim Engandela

Horizon Software

Home Entertainment System

1293.1-1.100

Done

Proposal Favorite

☐

Clear Favorite

Proposal Status

☒ Progress

☐ Review

☐ Sent

☐ Lost

Clear Status

Completed Projects: Convert to Proposal-Project

Discipline	Area	Phase	Completed - Detail by Area		Utilities		Home
Client	Areas	Fees	Mike & Jessica Potter		Pricing	Invoicing	Leave
Project	Info	Products	Commercial Security System		Payments	Purchasing	Tracker
Contacts	Log	Supplements	1287.1-1.100		Install Notes	Work Orders	Print Menu
Client Mode	Super Views	QVE	QVC	QVP	Convert to Proposal-Project	Wire Manager	Change Orders
Discipline : Category : Type		CO's	Qty	Make : Model : Sku	Description	Finish	Grand Total
Commercial Security System							
Zone 1 - Home Theater							\$15,659.03
Audio : Ampli :	Multi-chan	1 ea	Linn : 5125		Five channel power amplifier	Silver	1,375.00
Audio : Speak :	Bookshelf	5 pr	Linn : Katan		Bookshelf loudspeakers: pair	Black	2,487.50
Audio : Speak :	Powered Su	1 ea	Linn : Melodik		Aktive isobarik bass extension	Black	2,475.00
Video : Displ :	DLP Video	1 ea	Runco : CL-610		DLP Projector		3,997.50
Video : Sourc :	DVD Player	1 ea	Sony : DVP-NS999ES		Progressive Scan DVD Player	Black	517.00
Autom : Remot :	Handheld R	1 ea	Linn : 5101 Personal Handset		Universal learning remote	Black	195.00
Autom : Contr :	Keypad	1 ea	Linn : Knekt RCU		Knekt room control unit	White	375.00

SCPS Upgrade: Speed up processing time

script:invoice:util.upgrade.cleanOrphanedInvoices



Please be patient and wait until the "Upgrade Completed" notice appears

The upgrade process can take some time, especially if your files have a large number of records.
If the upgrade is not successful, make sure your SCPS files are not buried in a folder, inside the new SCPS folder and that your current SCPS folder is exactly named "SCPSold". Then try again.

Please call Horizon Software at 715-287-3335 if you need technical assistance

Upgrade Start & End

8/18/2021 Upgrade Start Date

8:22 PM Upgrade Start Time

Upgrade End Date

Upgrade End Time

Tyler Product Import - User Lockout

SCPS Users will now be prevented from Logging into SCPS or entering the Proposals, Projects, Completed, Archive, Product Library, Product Sets Library or Point of Sale modules, until the Tyler Import has finished.

SCPS Users will now be prevented from Adding Products, Product Sets and Supplements to Proposals, and Pending CO's until the Tyler Import has finished.

SmartPartner SOFTWARE

High Definition Proposal & Project Management System

Navigation buttons: 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. Sort: Last Name.

1 - Select User

#	Location	User	#	Level
1	EME Audio & Video Systems	Dowling, Dave	51	Adm
1	EME Audio & Video Systems	Engandela, Jim	100	Adm
2	Horizon	Engandela, Sandy	101	User
1	EME Audio & Video Systems	Oster, Jon	45	Mgr

Tyler Product Import in Progress
Please wait before using SCPS

2 - Enter Password

for
Jim Engandela

Password



Message

The Tyler Product Import Routine is running.
You cannot Log into SCPS or enter the Proposal/Projects or Product Library until it is completed.
Please try again later, when the screen message no longer appears.

OK



Help



Exit



SmartPartner SOFTWARE

High Definition Proposal & Project Management System

Tyler Product Import in Progress - Please wait before using SCPS

Contacts	Master Tools	Proposals	Product Library	CPS
Info	Project Manager	Projects	Completed	Point
Forms	Follow Up	Completed	Point	Point
Preferences	Archive	Point	Point	Point

Message

The Tyler Product Import Routine is running.

You cannot Log into SCPS or enter the Proposal/Projects or Product Library until it is completed.

Please try again later, when the screen message no longer appears.

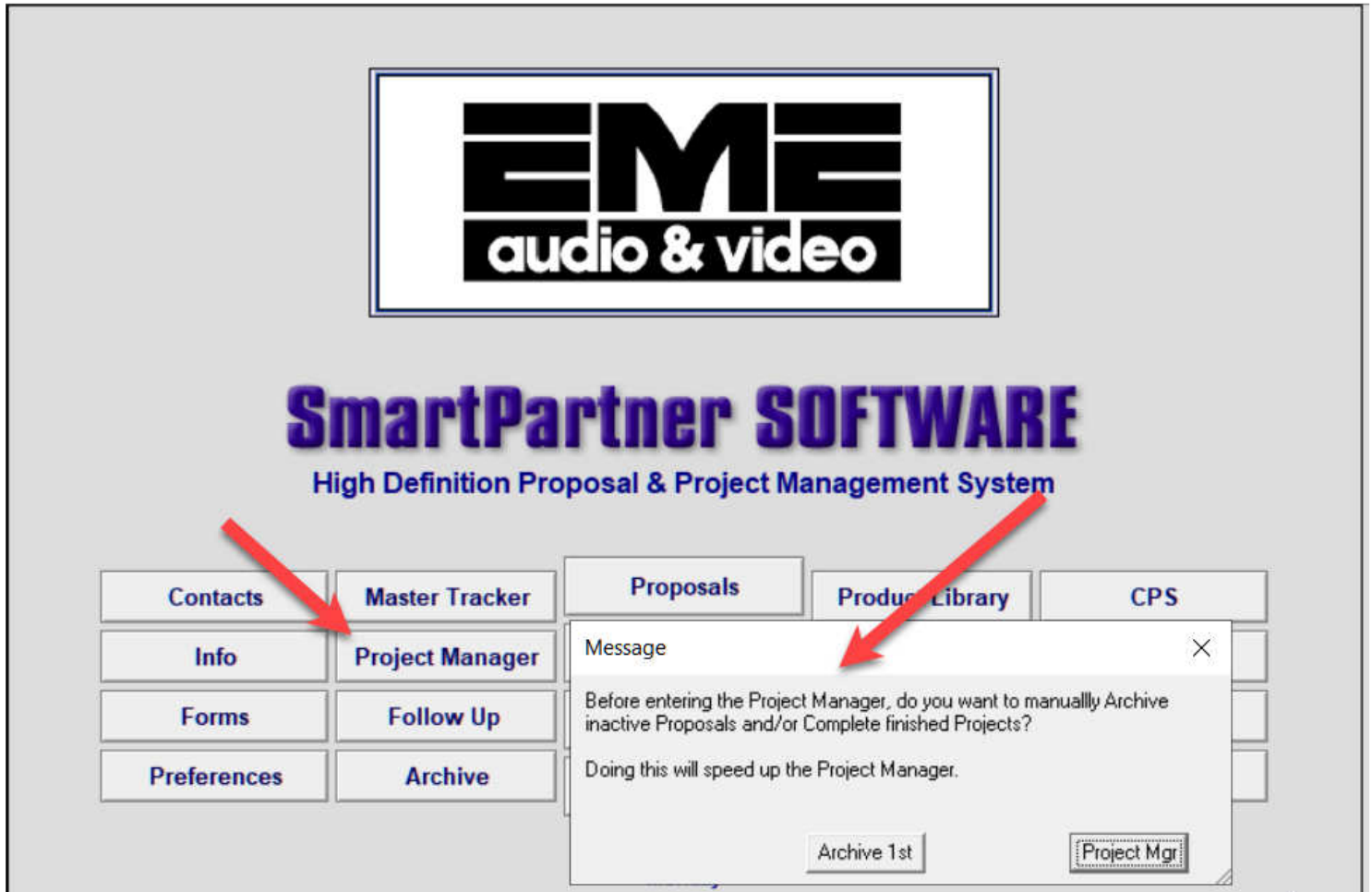
OK

Tyler Product Import: Fix Plug In processing

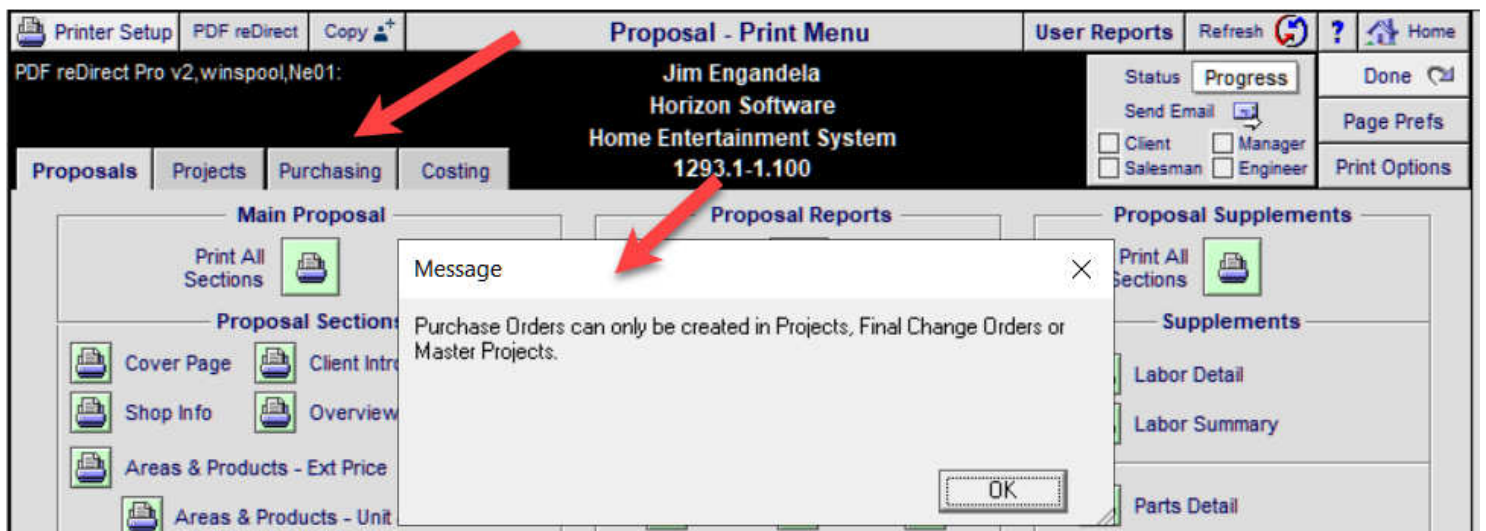
Master Prefs - Accounting - Tyler				Export Equivalents	Print	?	Home																						
Tyler Auto Import Setting	Tyler Value Lists	Current version in use: FileMaker Pro 6.0v4 Dev Import uses FileMaker 6.0 - Auto Import uses Events Plug In		Tyler Product Library	Tyler Product Updater	Done																							
Importing Options		Last Import 4/26/2007 6:58:11 AM		Blank Tyler Items to Fix		Copy Text	Clear Text																						
Delete - Hide Conditions All Products in the SCPS Product Library, that are not in the Tyler Import, will be Deleted. Unless they are in a Proposal/Project/Completed Project or their Product - Do Not Delete flag is checked. In that case they will simply be Hidden in the SCPS Product Library. All Products in the SCPS Product Library Class, Group and Descriptions will be updated with Tyler Class, Group and Descriptions, unless their Product Specs "Do not Update" flags are checked.		<p>This is a Notification that the Tyler Product Import contains records with fields that are Blank.</p> <p>These Products need to be Updated as soon as possible for the next Tyler - SCPS Product Import.</p> <ul style="list-style-type: none">- Modify SCPS Equivalent Tables >> Make, Dept, Category, Type, Class, Phase- Modify Tyler >> Description, Status, Unit, Unit Sell, Unit Sell Min, Unit Cost. <table border="0"><tr><td>- BENNETT-70391</td><td>>> Make ID=Make >> Status</td></tr><tr><td>Naim - UNITL-STAR</td><td>>> Category >> Type >> Class >> Phase >> Status</td></tr><tr><td>- QK9201AK2C840</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QK9201AK2P840</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QS1130840-BRO</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QS1132840-WHI</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QS1133840-WHI</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QS1134840-WHI</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QS1135840-WHI</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QS1136840-BRO</td><td>>> Make ID=Make >> Status</td></tr><tr><td>- QS1137840-WHI</td><td>>> Make ID=Make >> Status</td></tr></table>						- BENNETT-70391	>> Make ID=Make >> Status	Naim - UNITL-STAR	>> Category >> Type >> Class >> Phase >> Status	- QK9201AK2C840	>> Make ID=Make >> Status	- QK9201AK2P840	>> Make ID=Make >> Status	- QS1130840-BRO	>> Make ID=Make >> Status	- QS1132840-WHI	>> Make ID=Make >> Status	- QS1133840-WHI	>> Make ID=Make >> Status	- QS1134840-WHI	>> Make ID=Make >> Status	- QS1135840-WHI	>> Make ID=Make >> Status	- QS1136840-BRO	>> Make ID=Make >> Status	- QS1137840-WHI	>> Make ID=Make >> Status
- BENNETT-70391	>> Make ID=Make >> Status																												
Naim - UNITL-STAR	>> Category >> Type >> Class >> Phase >> Status																												
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- QS1136840-BRO	>> Make ID=Make >> Status																												
- QS1137840-WHI	>> Make ID=Make >> Status																												
Product Do Not Update (Overrides the Product Specs "Do not Update" option) <input type="checkbox"/> Do not Update All Product Class with Tyler Class <input type="checkbox"/> Do not Update All Product Groups with Tyler Department <input type="checkbox"/> Do not Update All Product Descriptions with Tyler Descriptions <input checked="" type="checkbox"/> Do not Delete all ProdUpdater Records after Import Routine (default = unchecked)		<input checked="" type="checkbox"/> Show "TYL" Header instead of "Inventory Qty" in Product Library																											
Only Run Auto Import with this User <input checked="" type="radio"/> Jim Engandela <input type="radio"/> Dave Jackson	Tyler or SCPS Import File Path Option <input type="radio"/> SCPS Folder <input checked="" type="radio"/> LU Folder	Default = Check All Return to Logo Screen after "Auto Run" Import Routine <input checked="" type="checkbox"/>		Default = UnCheck All Global Temp <input checked="" type="checkbox"/> Turn Off Auto Import <input type="checkbox"/> Turn Off User Lockout <input type="checkbox"/> Clear User Lockout Flag <input type="checkbox"/>		Run - Import Tyler >> SCPS 1st Install SMPiT Plug in 1st UnCheck "Turn Off Auto Import" Routine																							
Current User User: Jim Engandela		Tyler User Name Listen Up - Tyler		Tyler Blank Product Notification 1st Install SMPiT Plug in Email Address Horizon eMail Dave J eMail Darren eMail Email Test																									

Current SCPS 15.1v1 Features & Enhancement Details

SCPS Main Logo screen: Project Manager Option Message



Proposals/Print Menu: Trap Purchasing tab



Project/Utility/Export: Multiple Export Options

- You now have 2 main choices.
- An export with all Products, Supplements and Fees or Only Products.
- Within each of these you can select the Sort Order you prefer.
- If you don't select a Sort Order the Export will default to Sorted by Make.

Master Project - Export Utility

Greg Caves
Runco International
Home Entertainment System
1297.1-1.100

Project | **Export** | Admin

Export the Products in this Project as a dbf File
This .dbf file can be opened with Excel

Fields included in Export
PROJECT NUMBER - CLIENT - COMPANY - SALESMAN
DISCIPLINE - ZONE/AREA - PHASE
CO NUMBER - QTY - UNIT - MAKE - MODEL - QB_SKU - CLASS - GROUP- DESCRIPTION - FINISH
UNIT_COST - UNIT_SELL - Ext_SELL - UNIT_LABOR - TAX STATUS

Products, Parts, Wire, Labor, Fees
Sort Order
Default = A8 Class - Make

Only Products
Sort Order
Default = B7 Make

Products, Parts, Wire, Labor, Fees
Sort Order
Default = A8 Class - Make

Only Products
Sort Order
Default = B7 Make



Sort Order Options (Left):

- A1 Discipline - Area - Make
- A2 Discipline - Make
- A3 Phase - Discipline - Area - Make
- A4 Phase - Area - Make
- A5 Phase - Make
- A6 Area - Make
- A7 Make
- A8 Product Class - Make

Sort Order Options (Right):




- B1 Discipline - Area - Make
- B2 Discipline - Make
- B3 Phase - Discipline - Area - Make
- B4 Phase - Area - Make
- B5 Phase - Make
- B6 Area - Make
- B7 Make

Example of file name produced. GD_OrgChart_1296.1-1.100.tab

Project Utility - Export SCPS Project to Excel												
Export 	Click Done button to change Sort Order								Export 	Click Done button to		
Done	1297.1-1.100								Done			
Project Number	Client	Company	Zone - Area	Discipline	Product Phase Class	CO#	Qty	Unit	Make	Model	Finish	
1297.1-1.100	Caves, Greg	Runco International	1 - Game Room	Audio	3 Product		2	ea	Klipsch	RS-7	Matte Black	
1297.1-1.100	Caves, Greg	Runco International	2 - Computer Room	Audio	3 Product	C	4	ea	Klipsch	RS-7	Matte Black	
1297.1-1.100	Caves, Greg	Runco International	2 - Computer Room	Audio	3 Product	D c1	-2	ea	Klipsch	RS-7	Matte Black	
1297.1-1.100	Caves, Greg	Runco International	1 - Game Room	Audio	2 Product	C	1	ea	Linn	5101 Personal Handset	Black	
1297.1-1.100	Caves, Greg	Runco International	1 - Game Room	Audio	2 Product	A c1	3	ea	Linn	5101 Personal Handset	Black	
1297.1-1.100	Caves, Greg	Runco International	2 - Computer Room	Audio	2 Product		5	ea	Linn	5101 Personal Handset	Black	
			1 - Game Room		2 Part		1	ea	Linn	Cirkus Kit		
			1 - Game Room		2 Part	A c1	3	ea	Linn	Cirkus Kit		
			2 - Computer Room		2 Part		5	ea	Linn	Cirkus Kit		
			1 - Game Room		3 Part		2	ea	Linn	Knekt RCU Install Kit		
			1 - Game Room		3 Part	A c1	6	ea	Linn	Knekt RCU Install Kit		
			2 - Computer Room		3 Part		10	ea	Linn	Knekt RCU Install Kit		
			1 - Game Room		2 Part		1	ea	Linn	Knekt RCU Metalwork		
			1 - Game Room		2 Part	A c1	3	ea	Linn	Knekt RCU Metalwork		
			2 - Computer Room		2 Part		5	ea	Linn	Knekt RCU Metalwork		
			2 - Computer Room		3 Pre-Cut Wire & Cable		15	pr	Linn	Black Interconnect		
			2 - Computer Room		1 Bulk Wire & Cable		750	m	Linn	K10 Cable		
			2 - Computer Room		1 Bulk Wire & Cable		300	ft	Linn	K20 Cable		
			2 - Computer Room		1 Bulk Wire & Cable		600	ft	Linn	K20 Cable		
			2 - Computer Room		1 Bulk Wire & Cable	D c1	-150	ft	Linn	K20 Cable		
			2 - Computer Room		1 Bulk Wire & Cable	D c1	-300	ft	Linn	K20 Cable		
			2 - Computer Room		1 Bulk Wire & Cable		750	ft	Monster	16/2 Spkr Wire		
			2 - Computer Room		1 Bulk Wire & Cable		750	ft	Monster	16/2 Spkr Wire		
			2 - Computer Room		1 Bulk Wire & Cable		375	ft	Monster	MVQUAD-B DB EZ500		
			2 - Computer Room		1 Labor		7:30:00		Klipsch	RS-7		
			2 - Computer Room		1 Labor	c1	-3:45:00		Klipsch	RS-7		
			2 - Computer Room		3 Labor		1:20:00		Klipsch	RS-7		
			2 - Computer Room		3 Labor	c1	-0:40:00		Klipsch	RS-7		
			2 - Computer Room		1 Labor		21:52:30		Linn	5101 Personal Handset		
			2 - Computer Room		2 Labor		2:30:00		Linn	5101 Personal Handset		
			2 - Computer Room		2 Labor		30:00:00		Linn	5101 Personal Handset		
			2 - Computer Room		2 Labor		5:00:00		Linn	5101 Personal Handset		
			2 - Computer Room		3 Labor		5:00:00		Linn	5101 Personal Handset		

Proposal & POS-Pick Product Cue Notes: Speed up Cue process and Add Features

Master Preferences to turn on the Product Cue Note option to pop up Product Cue Notes when Picking Products into a Proposal.

Master Prefs - Other - Products 1						?	Home
Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters		
Proposal 2	Project CO	Products 2	Misc 2	3rd Party 2	Graphics	Done 	
<p>Product Library</p> <p>Sort Products when entering the Product Library <input type="radio"/> Yes <input checked="" type="radio"/> No (No Sort recommended)</p>							
<p>Adding Product - Auto Set Product Flags</p> <p><input type="checkbox"/> Issue Staple Up Card</p>							
<p>Product Cue Notes</p> <p> <input type="checkbox"/> Show Cue Notes when Picking Products into a Proposal</p> <p> <input checked="" type="checkbox"/> Show Cue Notes when Picking Products into a POS Invoice</p> <p><i>Set & Subset Cue Notes will not show when picking Sets</i></p> <p><i>Product Cue Notes will not show when using the Proposal Update All Products Utility</i></p>							

- Sort Products with Cue Notes to the top of the list
- Click on the Cue Note icon to pop up the Cue Note

In the Proposal Product screen you can sort Products with Cue Notes to the top of the list and view the Cue Note by clicking on the Cue Icon

In the Proposal Product Detail screen you can view the entire contents of the Cue Note by clicking on the Cue Note Text

Delete Product
Client Mode

Delete Product
Client Mode

Proposal - Product Detail
Reset Labor
1 of 4
?
Home

Areas
Text
Products

Labor
Parts
Wire
Tasks

Eileen Back
1290.1-1.100
Klipsch : Melodik
Audio : Speaker : Center Channel

Proposal
Products

Product
Specs
Pix - PDF's
Labor
Parts
Wire
Tasks

Atrium

Qty
1

Make
Klipsch

Model
Melodik

SKU

Finish
Black Ash

Description
Center Channel Speaker

Proposal Comment

Features
This center channel has been engineered to deliver all the detail, subtleties and dynamics required for the ultimate home theater experience. It delivers detailed, subtle and thrilling sounds through dual 6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The tweeter is coupled to an exclusive Klipsch square Tractrix® Horn that boosts the driver's already high sensitivity, while minimizing room interactions that cause a loss of

Cue Notes
6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The

Unit
Unit Price

ea
List
\$399.00
Adjustment

Sell
\$399.00

Minimum Sell

Loaded Cost
\$210.00

Raw Cost
\$210.00

Ext Load Cost
\$210.00

Discount

Parts Cost
Wire Cost

Unit
\$0.00
\$0.00

Group
Audio : Speaker : Center Channel

Change Group
Original Group
Audio

Product Classification
Product

Primary Install Phase
3 Final

Tax A
Tax B
Tax C
Labor Tax Override

No Discount
Exclude Price
Hide Price
Option Product
Product Sort
m

Zero Supplement Prices
Do not Purchase or Install

Purchasing
Tyler Priority Code
Purchasing Lead Days

Default Vendor
Klipsch Audio Technologies

Alternate PO Vendor
Alt PO Cost

Use Alt

Klipsch : Melodik

6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The tweeter is coupled to an exclusive Klipsch square Tractrix® Horn that boosts the driver's already high sensitivity, while minimizing room interactions that cause a loss of sonic detail. Contemporary black wood grain vinyl finish.

OK

Installed Sell
\$399.00
\$0.00
\$0.00
GP%
\$399.00
47.4%

Led Installed Sell
\$399.00
GP%

Total Sell
\$399.00
Ext Total
\$399.00
47.4%

Proposal/AP Report: Increase Product Features field size

The Product Features field will now accommodate much more text


Areas & Products

Bungalow

This area includes the following products and features.

A wall mounted volume control will control the music from the main components.

Audio	Qty	Ext. Price
Klipsch : RSW-10 : Reference Subwoofer : Black Ash	2 ea	\$2,000.00



Reference Series powered subwoofers shatter your expectations for deep, driving bass by playing louder and going deeper than significantly larger designs, creating the most dramatic, intense bass you've ever heard or felt. Designed from the ground up for class-leading, room-filling low-frequency performance, the RSW-10 is sonically, cosmetically and technologically matched to the Reference Series

Reference Series powered subwoofers shatter your expectations for deep, driving bass by playing louder and going deeper than significantly larger designs, creating the most dramatic, intense bass you've ever heard or felt. Designed from the ground up for class-leading, room-filling low-frequency performance, the RSW-10 is sonically, cosmetically and technologically matched to the Reference Series

Reference Series powered subwoofers shatter your expectations for deep, driving bass by playing louder and going deeper than significantly larger designs, creating the most dramatic, intense bass you've ever heard or felt. Designed from the ground up for class-leading, room-filling low-frequency performance, the RSW-10 is sonically, cosmetically and technologically matched to the Reference Seriesx

Linn : 5101 Personal Handset : Universal learning remote : Black	1 ea	\$600.00
--	------	----------

Programmable, high-power, long range, infra-red remote control for hand held or table top operation

Video	Qty	Ext. Price
Runco : CL-610 : DLP Projector	1 ea	\$7,995.00

Single DMD Chip, 1280 x 720, Internal Processor, Brightness: 12.3 - 19.3 fL, Contrast Ratio 185:1 - 205:1, Lamp: 210W NSH 2000 Hours @ 6500K, Max Screen Size: 240", Offset: via OSD Controls

Equipment	\$10,595.00
Installation	\$1,407.50
Misc. Parts	\$1,275.00
Wire & Cable	\$2,117.45
Bungalow	\$15,394.95

Proposal and Project Pricing Reports: Fix Print Menus

Print button now prints Pricing report instead of screen

Client Mode ☐

Proposal - Pricing
Printer Setup
Print
? Home

Mr. Jim Engandela
Horizon Software
Home Entertainment System
1293.1-1.100

Done

Pricing
Labor
Commissions

Tax Summary
Product Tax
Fees Tax

Refresh

Excluded Products Totals
Labor Meter

Cost

Adjust Grand Total

Subtotals	Sell	Discount	Total Labor Time
Equipment	\$27,384.00		67:30:00
Installation	\$5,392.50		
Misc. Parts	\$5,003.33		
Wire & Cable	\$7,782.40		
Fees	\$0.00		
Total	\$45,562.23		
PST Tax	\$2,489.42		
Tax B	\$0.00		
Tax C	\$0.00		
Tax	\$2,489.42		
Grand Total	\$48,051.66		

☒ yes ☐ no Show Sales Tax
☒ yes ☐ no Show List Price & Discount

P

Proposal - Pricing - Cost
Printer Setup
Print
? Home

Mr. Jim Engandela
Horizon Software
Home Entertainment System
1293.1-1.100

Done

Proposal - Pricing

RePost

Subtotals	Sell	Cost	Profit	GP%
Equipment	\$27,384.00	\$15,597.00	\$11,787.00	43.0%
Installation	\$5,392.50	\$2,845.42	\$2,547.08	47.2%
Misc. Parts	\$5,003.33	\$2,984.00	\$2,019.33	40.4%
Wire & Cable	\$7,782.40	\$4,363.44	\$3,418.96	43.9%
Fees	\$0.00	\$0.00	\$0.00	
Total	\$45,562.23	\$25,789.86	\$19,772.38	43.4%
PST Tax	\$2,489.42			
Tax B	\$0.00			
Tax C	\$0.00			
Tax	\$2,489.42			
Grand Total	\$48,051.66			

Product Library: Favorites- Improve and Speed

Find Products Show: Makes ☒ Groups ☒ Hidden ☐ Product Library - Line List AlphaFind Utilities

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

A Product Class Hidden Products
B Part Phantom Discontinued
C Bulk PreCut Show Supplements Found 37
Lab Part Wire Total 61

EME audio & video

Add Product Detail List Home
Inventory Utility Lists Product Sets
Print Menu

Fav Groups View Sell Price TYL Tag
Class Discipline Type Supplements Make Model : SKU Description Finish Installed Cue Hide

A	Audio	Speak	Powered Subwoofer	Klipsch	RSW-10	Reference	Black	1,000.00 ea	A
A	Audio	Multi	Keypad	Linn	5101 Personal Handset	Universal	Black	600.00 ea	C
A	Audio	Ampli	Surround Processor	Linn	5103 System Controller	Linn 5103 inc		5,500.00 ea	
A	Audio	Speak	On-Wall	Linn	5110-W	Pair of on-wall	White	325.00 ea	
A	Audio	Ampli	Multi-channel	Linn	5125	Five channel	Silver	2,750.00 ea	
A	Audio	Misc	Final Part	Linn	Aktiv Modules	Stereo or twin		300.00 ea	
A	Audio	Sourc	Phono	Linn	Cirkus Kit	Main bearing		645.00 ea	

Products: Add Tyler Priority Code

Master Prefs//Account/Tyler Option

Master Prefs - Accounting - Tyler Export Equivalents Print ? Home

Tyler Auto Import Setting Tyler Value Lists Current version in use: FileMaker Pro 6.0v4 Dev Import uses FileMaker 6.0 - Auto Import uses Events Plug In Tyler Product Library Tyler Product Updater Done

Importing Options Last Import 4/26/2007 6:58:11 AM Blank Tyler Items to Fix Copy Text Clear Text

Delete - Hide Conditions

All Products in the SCPS Product Library, that are not in the Tyler Import, will be Deleted. Unless they are in a Proposal/Project/Completed Project or their Product - Do Not Delete flag is checked. In that case they will simply be Hidden in the SCPS Product Library.

All Products in the SCPS Product Library Class, Group and Descriptions will be updated with Tyler Class, Group and Descriptions, unless their Product Specs "Do not Update" flags are checked.

Checking these "Do Not Update" boxes overrides the Product Specs "Do not Update" boxes

☐ Do not Update All Product Class with Tyler Class

☐ Do not Update All Product Groups with Tyler Department

☐ Do not Update All Product Descriptions with Tyler Descriptions

☒ Do not Delete all ProdUpdater Records after Import Routine (default = unchecked)

Show "TYL" Header instead of "Inventory Qty" in Product Library ☒

This is a Notification that the Tyler Product Import contains records with fields that are Blank.

These Products need to be Updated as soon as possible for the next Tyler - SCPS Product Import.

- Modify SCPS Equivalent Tables >> Make, Dept, Category, Type, Class, Phase

- Modify Tyler >> Description, Status, Unit, Unit Sell, Unit Sell Min, Unit Cost.

- BENNETT-70391 >> Make ID=Make >> Status

Naim - UNIFI-STAR >> Category >> Type >> Class >> Phase >> Status

- QK9201AK2C840 >> Make ID=Make >> Status

- QK9201AK2P840 >> Make ID=Make >> Status

- QS1130840-BRO >> Make ID=Make >> Status

- QS1132840-WHI >> Make ID=Make >> Status

- QS1133840-WHI >> Make ID=Make >> Status

- QS1134840-WHI >> Make ID=Make >> Status

- QS1135840-WHI >> Make ID=Make >> Status

- QS1136840-BRO >> Make ID=Make >> Status

- QS1137840-WHI >> Make ID=Make >> Status

Product Library Tyler Code - Click TYL to sort codes

Find Products			Show: Makes <input checked="" type="checkbox"/> Groups <input checked="" type="checkbox"/> Hidden <input type="checkbox"/>															Product Library - Line List										AlphaFind			Utilities				?
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							
A			Product Class		Hidden Products		<div>EME audio & video</div>																				Add Product		Detail List		Home				
B			Part		Discontinued																						Add Product		Detail List		Product Sets				
C			Bulk		PreCut																						Inventory		Lists		Print Menu				
							Show Supplements		Found 58																										
							Lab		Part		Wire		Total 61																						
Fav			Groups			View																							Sell Price		TYL		Tag		
Class			Discipline	Cat	Type	Suppliments			Make	Model : SKU			Description			Finish	Installed			<input type="checkbox"/>	Cue	Hide													
B			Audio	Speak	Center Channel				Klipsch	Melodik			Center Channel			Black	399.00 ea																		
B			Audio	Speak	Floor				Klipsch	RF-35 (6483)			Reference			Black	399.00 ea																		
C			Audio	Speak	Bookshelf				Klipsch	RS-7			Reference			Matte	450.00 ea																		
A			Audio	Speak	Powered Subwoofer				Klipsch	RSW-10			Reference			Black	1,000.00 ea			A															
A			Audio	Multi	Keypad				Linn	5101 Personal Handset			Universal			Black	600.00 ea			C															
A			Audio	Ampli	Surround Processor				Linn	5103 System Controller			Linn 5103 inc			5,500.00 ea																			
A			Audio	Speak	On-Wall				Linn	5110-W			Pair of on-wall			White	325.00 ea																		
A			Audio	Ampli	Multi-channel				Linn	5125			Five channel			Silver	2,750.00 ea																		
A			Audio	Ampli	Preamplifier				Linn	Klimax Chakra 500			Klimax Twin			Silver	7,995.00 ea																		
A			Audio	Speak	Powered Subwoofer				Linn	Melodik			Aktive isobarik			Black	4,950.00 ea			A															

Find Products	Replace Data	Product Library - Product Detail	4 of 58	AlphaFind	?	Home
Created: 4/15/2005		Klipsch RSW-10		Add Product	Done	
Delete Product	Sell Updated: 6/2/2011	Reference Subwoofer		Duplicate Product	Prev Next	
Cost Updated: 6/2/2011		Audio : Speaker : Powered Subwoofer				
Product	Specs	Pix	PDF	Labor	Parts	Wire
Make	Klipsch	Unit Sell	\$1,000.00 ea			
Model	RSW-10	Installed Sell	\$1,107.50 ea			
SKU						
Finish	Black Ash					
Description	Reference Subwoofer					
Features	<p>Reference Series powered subwoofers shatter your expectations deep, driving bass by playing louder and going deeper than significantly larger designs, creating the most dramatic, intense bass you've ever heard or felt. Designed from the ground up for class-leading, room-filling low-frequency performance, the RSW-10 is sonically, cosmetically and technologically matched to the Reference Series</p>					
				<p>Group</p> <p>Audio : Speaker : Powered Subwoofer</p> <p>Class <input type="radio"/> Product</p> <p>Phase <input type="text" value="3 Final"/></p> <p>Product Status</p> <p>Phantom Product <input type="checkbox"/> ?</p> <p>QB Fee SKU <input type="checkbox"/> ?</p> <p>Favorite <input type="text" value="A"/></p> <p>Tyler Priority Code <input type="text" value="A"/></p> <p>This Product is In a Proposal/Project/Change Order</p> <p>Proposal Options</p> <p>New Item <input type="checkbox"/></p> <p>Discontinued Item <input type="checkbox"/></p> <p>Hide this Item <input type="checkbox"/></p> <p>Do not Hide <input type="checkbox"/> ?</p> <p>Do not Delete <input type="checkbox"/></p>		

Proposals & Projects

Clicking on the Underlined Tyler Priority header will sort all Products with a code to the top of the list

Show All		Orphans		Client Mode <input type="checkbox"/> MP		Master Project - Products - View										Home							
Areas		Text		Products		John & Mary Smith										Done							
Labor		Parts		Wire		Tasks		Product Install Phases		Home Entertainment System 1284.1-1.100										Phantom Orphan		Super Views	
Zone - Area		Like Kind Qty ?		Make		Model		Product Total		\$70,755.83													
No Exclude Hide Option		Discipline		Category		Type		Product Labor		Unit List		Unit Sell		Ext Sell									
Discount Price Product		Phase		Finish		Description		Parts Labor		Unit Cost		GP%		Ext Installed									
Show Show Show Show Show		CO's		View Tyler Priority		Comment		Wire Labor		Ext Cost		Updated		Ext Discount									
1 - Home Theater				1 ea		Linn		Melodik		130		4,950.00		4,950.00									
				3 Final		Black		Powered Subwoofer		95		2,970.00		40.0%		5,080.00							
				A		Active isobarik bass		319		2,970.00		6/2/2011											
2 - Living Room				1 ea		Klipsch		RSW-10		130		1,000.00		1,000.00		1,000.00							
				3 Final		Black Ash		Powered Subwoofer		95		525.00		47.5%		1,130.00							
				A		Reference Subwoofer :		319		525.00		6/2/2011											
1 - Home Theater				1 ea		Linn		Melodik		130		4,950.00		4,950.00									
				3 Final		Black		Powered Subwoofer		95		2,970.00		40.0%		5,080.00							
				A		Active isobarik bass		319		2,970.00		6/2/2011											
1 - Home Theater				1 ea		Linn		Knekt RCU		205		750.00		750.00									
				2 Trim		White		Keypad		105		450.00		40.0%		955.00							
				B		Knekt room control unit :		245		450.00		6/2/2011											
4 - Dining Room				1 ea		Linn		Knekt RCU		205		750.00		750.00									
				2 Trim		White		Keypad		105		450.00		40.0%		955.00							
				B		Knekt room control unit :		245		450.00		6/2/2011											
4 - Kitchen				1 ea		Linn		Knekt RCU		205		750.00		750.00									
				2 Trim		White		Keypad		105		450.00		40.0%		955.00							
				B		Knekt room control unit :		245		450.00		6/2/2011											

Client Mode <input type="checkbox"/>	Master Project - Product Detail View										1 of 33	Home
John & Mary Smith												Done
1284.1-1.100												Prev Next
Linn : Melodik												
Audio : Speaker : Powered Subwoofer												
Product	Specs	Pix - PDF's	Labor	Parts	Wire	Tasks	1 - Home Theater					
Qty	1						Group Audio : Speaker : Powered Subwoofer					
Make	Linn		Sell Price				Change Group Original Audio					
Model	Melodik		\$4,950.00 ea				Product Classification Product					
SKU							Primary Install Phase 3 Final					
Finish	Black						Tax A T + Tax B T					
Description	Active isobarik bass extension loudspeaker					Do not Discount <input type="checkbox"/> Product Sort m						
Features						Show Product as Option <input type="checkbox"/> Discontinued <input type="checkbox"/>						
Proposal Comment						Staple Card <input type="checkbox"/>						
Cue Notes						Tyler Priority Code A Purchasing Lead Days 7						
						Alt-x <input type="checkbox"/> Vendor						
						Alternate PO Vendor ? Alt PO Cost						
						Use Alt <input type="checkbox"/>						

Print Menu and Report

0100200300400500600700

Printer Setup

PDF reDirect

Copy

Master Project - Print Menu

User Reports

Refresh

?

Home

PDF reDirect Pro v2,winspool,Ne01:

John & Mary Smith

Status

Done

Home Entertainment System

1284.1-1.100

Send Email

Page Prefs

Client

Manager

Salesman

Engineer

Print Options

Proposals

Projects

Purchasing

Costing

Main Proposal

Print All Sections

Proposal Sections

Cover Page

Client Intro

Shop Info

Overviews

Areas & Products - Ext Price

No Dups?

Areas & Products - Unit & Ext Price

Areaa & Products - No Prices

Area Totals - No Area Text or Products

Area Totals - Area Text - No Products

Hide Grand Total

Areaa & Products - Text & Totals

Product Summary

Show Grand Total

Hide Disciplines

Show Discipline Subtotals

Show Grand Total

Hide Grand Total

Page Break by Discipline

Fees & Services

Contract

Show 2nd Address

Show Both Addresses

Extra Text

Proposal Reports

Print All Sections

Products By

Discipline

Area

Phase

Sub Totals By

Discipline

Area

Phase

Grand Total By

Discipline

Area

Phase

Product Summary with Unit & Ext Pices

Product Summary - Unit & Ext Tyler

Hide Unit Price

Hide Disciplines

Page Break by Discipline

Product Summary - Unit & Ext Discipline Subtotals & Grand Total

Hide Unit Price

Hide Grand Total

Page Break by Discipline

Preliminary Contract

Preliminary Contract with Options

Area Text & Totals, Disclaimer

Pricing Policy Price Expiry Date

No Payments or Terms

Tax & Totals Options

Proposal Supplements

Print All Sections

Supplements

Labor Detail

Labor Summary

Parts Detail

Parts Summary

Wire & Cable Detail

Wire & Cable Summary

Fees - Directed to Parts

Fees - Directed to Labor

Master Proposal with Supplements

Discipline

Area

Products & Only Labor

Products & Supplements without Prices

Area by Phase

Phase

Product Summary

	<u>Tyler</u>	<u>Unit Price</u>	<u>Ext Price</u>
1 ea Klipsch : RC-35 : Center Channel Speaker : Black Ash		\$399.00	\$399.00
<i>This center channel has been engineered to deliver all the detail, subtleties and dynamics required for the ultimate home theater experience. It delivers detailed, subtle and thrilling sounds through dual 6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The tweeter is coupled to an exclusive Klipsch square Tractrix® Horn that boosts the driver's already high sensitivity, while minimizing room interactions that cause a loss of sonic detail. Contemporary black wood grain vinyl finish.</i>			
1 ea Klipsch : RSW-10 : Reference Subwoofer : Black Ash	A	\$1,000.00	\$1,000.00
<i>Reference Series powered subwoofers shatter your expectations for deep, driving bass by playing louder and going deeper than significantly larger designs, creating the most dramatic, intense bass you've ever heard or felt. Designed from the ground up for class-leading, room-filling low-frequency performance, the RSW-10 is sonically, cosmetically and technologically matched to the Reference Series</i>			
1 ea Linn : 5101 Personal Handset : Universal learning remote : Black	C	\$390.00	\$390.00
<i>Programmable, high-power, long range, infra-red remote control for hand held or table top operation</i>			
1 ea Linn : 5125 : Five channel power amplifier (Black) : Silver		\$2,750.00	\$2,750.00
<i>The Linn AV 5125 5-channel Class V modular power amplifier features the latest Linn switch mode power supply and amplification technology.</i>			

Proposal/Print Menu: Add Master Proposal With Area Subtotals

Also added to Custom Reports file.

"SCPS 15.1v2 Blue"

Printer Setup			PDF reDirect			Copy			Proposal - Print Menu			User Reports			Refresh			?			Home								
PDF reDirect Pro v2, winspool,Ne01:												Hayes Callahan												Status <input type="text"/>			Done		
Home Theater System 1283.1-1.100												<input type="checkbox"/> Client			<input type="checkbox"/> Manager			Page Prefs			<input type="checkbox"/> Salesman			<input type="checkbox"/> Engineer			Print Options		
Proposals			Projects			Purchasing			Costing																				

Main Proposal												Proposal Reports												Proposal Supplements											
Print All Sections												Print All Sections												Print All Sections											
Proposal Sections												Products By												Supplements											
Cover Page												Discipline												Labor Detail											
Client Intro												Area												Labor Summary											
Shop Info												Phase																							
Overviews																																			
Areas & Products - Ext Price No Dups ?												Sub Totals By																							
Areas & Products - Unit & Ext Price												Discipline																							
Areas & Products - No Prices												Area																							
Area Totals - No Area Text or Products												Phase																							
Area Totals - Area Text - No Products												Grand Total By																							
<input type="checkbox"/> Hide Grand Total												Discipline																							
Areas & Products - Text & Totals												Area																							
												Phase																							
Product Summary												Product Summary with Unit & Ext Pices																							
Show Grand Total												Product Summary - Unit & Ext Tyler																							
<input type="checkbox"/> Hide Disciplines												<input type="checkbox"/> Hide Unit Price																							
Show Discipline Subtotals												<input type="checkbox"/> Hide Disciplines																							
Show Grand Total												<input type="checkbox"/> Page Break by Discipline																							
<input type="checkbox"/> Hide Grand Total												Product Summary - Unit & Ext Discipline Subtotals & Grand Total																							
<input type="checkbox"/> Page Break by Discipline												<input type="checkbox"/> Hide Unit Price																							
												<input type="checkbox"/> Hide Grand Total																							
												<input type="checkbox"/> Page Break by Discipline																							
Fees & Services												Preliminary Contract																							
												Preliminary Contract with Options																							
Contract												Area Text & Totals, Disclaimer																							
<input type="checkbox"/> Show 2nd Address												Pricing Policy Price Expiry Date																							
<input type="checkbox"/> Show Both Addresses												No Payments or Terms																							
Extra Text												Tax & Totals Options																							

Master Proposal with Supplements											
Discipline											
Areas											
With Area & Grand Totals											
Products & Only Labor											
Products & Supplements without Prices											
Areas by Phase											
Phase											

Zone - Area

Master Proposal by Area

Discipline

Make - Model - Description

Labor Part Wire

Qty

Unit Price

Ext Price

Bungalow

Audio

Linn : 5101 Personal Handset : Universal learning remote : Black	1 ea	\$600.00	\$600.00
---	------	----------	----------

Klipsch : RSW-10 : Reference Subwoofer : Black Ash	2 ea	\$1,000.00	\$2,000.00
--	------	------------	------------

Video

Runco : CL-610 : DLP Projector	1 ea	\$7,995.00	\$7,995.00
--------------------------------	------	------------	------------

Equipment	\$10,595.00
-----------	-------------

Bungalow	\$10,595.00
----------	-------------

Four Seasons Room

Audio

Klipsch : RSW-10 : Reference Subwoofer : Black Ash	2 ea	\$1,000.00	\$2,000.00
--	------	------------	------------

Linn : 5101 Personal Handset : Universal learning remote : Black	1 ea	\$600.00	\$600.00
---	------	----------	----------

Klipsch : RC-35 : Center Channel Speaker : Black Ash	1 ea	\$399.00	\$399.00
--	------	----------	----------

Linn : Aktiv Modules : Stereo or twin mono Aktive crossover upgrade (treble, mid, bass)	1 ea	\$255.00	\$255.00
--	------	----------	----------

Linn : Classik Movie Di : Integrated multi-channel DVD-CD player/tuner/preamp/power amplifiers : Black	1 ea	\$3,995.00	\$3,995.00
---	------	------------	------------

Linn : Diskreet-Rd : In-wall loudspeakers - Round : White	1 pr	\$345.00	\$345.00
---	------	----------	----------

Linn : 5101 Personal Handset : Universal learning remote : Black	1 ea	\$600.00	\$600.00
---	------	----------	----------

Linn : 5101 Personal Handset : Universal learning remote : Black	1 ea	\$600.00	\$600.00
---	------	----------	----------

Video

Runco : CL-610 : DLP Projector	1 ea	\$7,995.00	\$7,995.00
--------------------------------	------	------------	------------

Equipment	\$16,789.00
-----------	-------------

Four Seasons Room	\$16,789.00
-------------------	-------------

Qty	Unit Price	Ext Price
-----	------------	-----------

Equipment	\$27,384.00
Installation	\$200.00
Misc. Parts	\$100.00
Wire & Cable	
Fees	
Total	\$27,684.00
Tax	\$1,506.12
Grand Total	\$29,190.12

Prices quoted are guaranteed until 10/1/2021

☒ Groups
 ☒ Hidden

Product Library - Line List

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

A

Product Class

Hidden Products

B

Part

Phantom

C

Bulk

PreCut

Discontinued

Supplements

Found 403

Total 403

+

Add Product

■

Inventory

Detail List

Utility Lists

Leave

Product Sets

Print Menu

Fav

Groups

Class

Discipline

Cat

Type

Suppliments

View

Make

Model : SKU

Description

Finish

Sell Price

Installed

Tag

<input type="checkbox"/>	<input checked="" type="radio"/>	Equip	<input type="checkbox"/>	Araknis Networks	AN-110-SW-C-8P	Araknis	239.95 ea	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="radio"/>	Equip	<input type="checkbox"/>	Araknis Networks	AN-210-SW-F-48-POE	Araknis	1,199.95 ea	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="radio"/>	Equip	<input type="checkbox"/>	Araknis Networks	AN-310-SW-F-8	Araknis	279.95 ea	<input type="checkbox"/>	<input type="checkbox"/>

Done

Clean Groom

Reset Update

Find Change

Import General

Import User

Import Accounting

Import Distributor

Export Products

Please Note: All Excel import files 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

Download Snap One Price List

Import Snap One

Import Products from Snap One

Import will Add products that do not exist in the Product Library
Import will Update prices in the Library, when Imported Products have the same Make and Model
Product Discipline will be set to "Equipment", Category & Type will be blank, Units will be set to "ea"
Excel Price List file Format - Column Headers must be labeled as specified

	A	B	C	D	E	F
1	SKU	SKU Name	Brand	Dealer Price	MSRP	Qty for Discount
2	DEC-STRAP-4-BR	Wirepath™ 4-Port Decorative Strap - Brown	Wirepath™	\$0.32	\$3.95	1
3	DEC-STRAP-4-BK	Wirepath™ 4-Port Decorative Strap - Black	Wirepath™	\$0.38	\$3.95	1
4	DEC-STRAP-6-BR	Wirepath™ 6-Port Decorative Strap - Brown	Wirepath™	\$0.39	\$3.95	1

Import Control4 Price List

Import Control4

Import Products from Control 4

Import will Add products that do not exist in the Product Library
Import will Update prices in the Library, when Imported Products have the same Make and Model
Product Discipline will be set to "Equipment", Category & Type will be blank, Units will be set to "ea"
Excel Price List file Format - Column Headers must be labeled as specified

A	B	C	D
Product ID	Product Name	Dealer Price	MSRP
Audio/Video			
Amplifiers			
2300-2	Triad Standalone RackAmp 300	\$388.75	\$719.95
2700-1	Triad Standalone RackAmp 700	\$654.35	\$1,211.95
EA-AMP-HYB-2D-1000	Episode® 70V/8-ohm IP-Enabled Amplifier 500W x 2 Channels	\$612.10	\$1,125.95
EA-AMP-SUB-1D-300	Episode® Digital Subwoofer Amplifier 300W x 1 Channel	\$352.15	\$647.95

Delete all Products in Library
Product Library Utility- Distributor Import
6009 of 6009 ?

Done

Clean Groom
Reset Update
Find Change
Import General
Import User
Import Accounting
Import Distributor
Export Products

Please Note: All Excel import files 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

Download Snap One Price List
Import Snap One

Import Products from Snap One

Import will Add products that do not exist in the Product Library
 Import will Update prices in the Library, when Imported Products have the same Make and Model
 Product Discipline will be set to "Equipment", Category & Type will be blank, Units will be set to "ea"

Excel Price List file Format - Column Headers must be labeled as specified

	A	B	C	D	E	F
1	SKU	SKU Name	Brand	Dealer Price	MSRP	Qty for Discount
2	DEC-STRAP-4-BR	Wirepath™ 4-Port Decorative Strap - Brown	Wirepath™	\$0.32	\$3.95	1
3	DEC-STRAP-4-BK	Wirepath™ 4-Port Decorative Strap - Black	Wirepath™	\$0.38	\$3.95	1
4	DEC-STRAP-6-BR	Wirepath™ 6-Port Decorative Strap - Brown	Wirepath™	\$0.39	\$3.95	1

Import Control4 Price List
Import Control4

Import Products from Control 4

Import will Add products that do not exist in the Product Library
 Import will Update prices in the Library, when Imported Products have the same Make and Model
 Product Discipline will be set to "Equipment", Category & Type will be blank, Units will be set to "ea"

Excel Price List file Format - Column Headers must be labeled as specified

A	B	C	D
Product ID	Product Name	Dealer Price	MSRP
Audio/Video			
Amplifiers			
2300-2	Triad Standalone RackAmp 300	\$388.75	\$719.95
2700-1	Triad Standalone RackAmp 700	\$654.35	\$1,211.95
EA-AMP-HYB-2D-1000	Episode® 70V/8-ohm IP-Enabled Amplifier 500W x 2 Channels	\$612.10	\$1,125.95
EA-AMP-SUB-1D-300	Episode® Digital Subwoofer Amplifier 300W x 1 Channel	\$352.15	\$647.95

Product Library/Find Products/Advanced: Find with No Prices

Find Products
Show: Makes ☒ Groups ☒ Hidden ☐
Product Library - Line List
AlphaFind
Utilities

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

Home
Product Sets
Print Menu

Product Class
Part
Bulk

Hidden Products
Discontinued
Show Supplements

Found 89
Total 2,885

Add Product
Inventory

Fav
Class Discipline Cat Type

Groups
Supplements

View
Make

Model : SKU

Description

Finish

Sell Price

Tag

Class	Discipline	Cat	Type	Supplements	Make	Model : SKU	Description	Finish	Sell Price	Tag
<input type="checkbox"/>	Equip				AAA Replace Make	C4-LIT-4ST-EN	4Sight Tri-Fold		ea	<input type="checkbox"/>
<input type="checkbox"/>	Equip				Alexa	C4-LIT-ALEXA-KIT2	Alexa Marketing		ea	<input type="checkbox"/>
<input type="checkbox"/>	Equip				AudioQuest	ZAQ-1CAT6DIE	AudioQuest		ea	<input type="checkbox"/>
<input type="checkbox"/>	Equip				AudioQuest	ZAQ-CAT7TOOL	AudioQuest		ea	<input type="checkbox"/>

Find Products Replace Data Product Library - Product Detail 1 of 90 AlphaFind ? Home

Created: 9/19/2021

AAA Replace Make Name
C4-LIT-4ST-EN
4Sight Tri-Fold Brochure
Equipment : :

Delete Product Sell Updated: 9/19/2021 Cost Updated: 9/19/2021 Add Product Duplicate Product Done Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

Make AAA Replace Make Name ? Unit Sell ea
Model C4-LIT-4ST-EN
SKU
Finish
Description 4Sight Tri-Fold Brochure
Features
Cue Notes
Unit ea

Group
Equipment : :
Class Product
Phase 3
Product Status
Phantom Product ? New Item
QB Fee SKU ? Discontinued Item
Favorite Hide this Item
Tyler Priority Code Do not Hide ?
This Product is Not in a Proposal/Project/Change Order Do not Delete
Proposal Options
Area Sort Order Do not Discount
Product Tax Override Hide Printed Price
Tax A Exclude Product Price ?
Tax B Zero All Supplement \$?
Tax C Do not Purchase or Install ?
Labor Tax Override ? Issue Install Staple Up Card ?

Purchasing
Add POS PO
Default PO Vendor ? Default PO Cost \$7.20
Use Alt Alternate PO Vendor ? Alt PO Cost
Optional Vendor Hold ? Opt PO Cost
Imported Product Supplier
Find All This Supplier Control4
Find All No Cost or Sell Price No Cost No Sell

Product	Parts	Wire	Installed Price
Sell \$0.00			
Labor Sell			
Installed Sell \$0.00			Total

Master Prefs/Accounting: Listen Up: Tyler Import Update

- Option to select which Log in User for Auto Running the Tyler Import, with options for Jim Engandela and Dave Jackson
- Reset Import File Name for both SCPS folder and LU Folder paths C:\TylerImport\New_Inventory_Master.txt
- Remap Files in the Import Map for the new Tyler Inventory File format
- Speed up overall processing speed for the entire import and grooming routine
- Ensure that the Option to Return to the Logo Screen at the end of the Import routine functions properly
- Ensure that the Do not Run Auto Import option functions properly
- Add Show TYL Product Library Header Display Option on all Product Library List screens
- Add Show TYL Product Library Header Sort Option on all Product Library List screens
- Disable Run - Manual Tyler Import Button until Auto Routine is verified

- Reorganize Screens for better clarity

Filemaker Events Plug in

Tyler Auto Import Setting

Tyler Value Lists

Master Prefs - Accounting - Tyler

Export Equivalents

Print

?

Home

Current version in use: FileMaker Pro 6.0v4 Dev

Tyler users must use FileMaker version 6.0 or later. Do not use FileMaker 5.0

Tyler Product Library DD

Tyler Product Updater

Done

Last Import 2/13/2021 5:09:32 PM

Blank Tyler Items to Fix

Copy Text

Clear Text

Importing Options

Delete - Hide Conditions

All Products in the SCPS Product Library, that are not in the Tyler Import, will be Deleted. Unless they are in a Proposal/Project/Completed Project or their Product - Do Not Delete flags is checked. In that case they will simply be Hidden in the SCPS Product Library.

All Products in the SCPS Product Library Class, Group and Descriptions will be updated with Tyler Class, Group and Descriptions, unless their Product Specs "Do not Update" flags are checked.

Checking these "Do Not Update" boxes overrides the Product Specs "Do not Update" boxes

☐ Do not Update All Product Class with Tyler Class
 ☐ Do not Update All Product Groups with Tyler Department
 ☐ Do not Update All Product Descriptions with Tyler Descriptions
 ☒ Do not Delete All ProdUpdater Records after Import Routine (default = unchecked)

Show "TYL" Header instead of "Inventory Qty" in Product Library

☒

This is a Notification that the Tyler Product Import contains records with fields that are Blank.

These Products need to be Updated as soon as possible for the next Tyler - SCPS Product Import.

- Modify SCPS Equivalent Tables >> Make, Dept, Category, Type, Class, Phase

- Modify Tyler >> Description, Status, Unit, Unit Sell, Unit Sell Min, Unit Cost.

- 280531 >> Make ID=Make >> Status

- AD-POE140 >> Make ID=Make >> Status

- BRONZE100-WAL >> Make ID=Make >> Status

- BRONZE200-GRY >> Make ID=Make >> Status

Only Run Auto Import with this User

☐ Jim Engandela
 ☒ Dave Jackson

Tyler or SCPS Import File Path Option

☒ SCPS Folder
 ☐ LU Folder

Return to Logo Screen after "Auto Run" Import Routine default = checked

☒

Do not run Auto Import Routine default = unchecked

☐

Run - Auto Import Tyler >> SCPS

Run - Manual Tyler >> SCPS

Tyler Blank Product Notification

Enable Auto Email

First Install SMPiT Plug in

Email Address

Horizon eMail

Dave J eMail

Darren eMail

Email Test

Current User

User: Dave Jackson

RCMS User Name

Listen Up - Tyler

Equivalent Tables

ID and Equivalents must be separated with =

Category - Type - Class - Phase are all based on the Tyler Type ID

Classification

Product

Part

Bulk Wire & Cable

Pre-Cut Wire & Cable

Install Phase

☒ 1 Prewire
 ☐ 2 Trim
 ☐ 3 Final

Exclude Makes from Import

Exclude Types from Import

Make	Dept (Discipline)	Category	Type	Class	Phase	
2N=2NUSA	==Special	==Special	==Special	==Product	==3.Final	
A&H=Allen & Heath	A0=Audio	3R%=Labor.Consulting	3R%=3rd.Party.Consult	3R%=Product	3R%=3.Final	@D%
A&K=Astell & Kern	A1=Audio	4K1=Video.4k.LCD.TV	4K1=4k.LCD.TV.< 32"	4K1=Product	4K1=3.Final	@D%
AAUTH=Audio Authority	A2=Audio	4K2=Video.4k.LCD.TV	4K2=4k.LCD.TV.32" - 49"	4K2=Product	4K2=3.Final	@G%
ACCES=Access Networks	A3=Audio	4K3=Video.4k.LCD.TV	4K3=4k.LCD.TV.50" - 60"	4K3=Product	4K3=3.Final	@G%
ACE=Ace Backstage	A4=Audio	4K4=Video.4k.LCD.TV	4K4=4k.LCD.TV.> 60"	4K4=Product	4K4=3.Final	@S%

5027 Total Records

5027 Found Records

0 Total Records

Prev

Next

Tyler/SCPS Product Import & Updater

Disable Menus (Mandatory)

Enable Menus

Home

Tyler Master Prefs

Tyler Product Library

Creston - DM-PSU-16

Tyler Fields = SCPS Fields

Brand = Make

pd.id.make

zp.pd.id.make.c

pd.make

Item# = Model

pd.model

Description1 = Description

pd.description

Description2 = Finish

pd.finish

Priority = TYL

(not used) pd.status

pd.tyl

Department = Department

pd.id.dept

zp.pd.id.dept.c

pd.dept

Category

pd.id.categ

zp.pd.id.type.c

Equivalents

CREST

Crestron

Crestron

DM-PSU-16

16Port PoDM Power Supply forDM

8g+ I/O Cards

Z1

Accessories

Accessories

ACP

Wire & Cable

Find Blanks

Print Blanks

Find Blanks

Print Blanks

Find Blanks

Print Blanks

Find Blanks

Print Blanks

Find Blanks

Print Blanks

Import Tyler

Delete All Records

Post Cat, Class, Phase

Import Records

Post Equivalents

Delete Header-Footer

Find Blank Products

Delete Status <> ABCD

Post Blanks to Global

Delete Blank Makes

Send eMail Notification

Delete Specific ID's

Find All Good Products

Only Run Auto Import with this User <input type="radio"/> Jim Engandela <input checked="" type="radio"/> Dave Jackson	Tyler or SCPS Import File Path Option <input checked="" type="radio"/> SCPS Folder <input type="radio"/> LU Folder	Return to Logo Screen after "Auto Run" Import Routine default = checked <input checked="" type="checkbox"/>	Do not run Auto Import Routine default = unchecked <input type="checkbox"/>	Classification Product Part Bulk Wire & Cable Pre-Cut Wire & Cable	Install Phase <input checked="" type="checkbox"/> 1 Prewire <input type="checkbox"/> 2 Trim <input type="checkbox"/> 3 Final	Find Unique Groups ID and Equipment Category - Type - Class
Current User User: Dave Jackson	RCMS User Name Listen Up - Tyler			eMail Notice Address		

zf.tylerImportUser.t	zf.tyler_importFilePath.t	zf.rcmsReturnToLogoScreen_afterImport	zf.evt2PluginDoNotRun.n
zdi.userThisMsg.g	rcms.username		

Script: Prefs: util.autoRun-LU Tyler

Make	Dept (Discipline)	Category	Type	Class	Phase	Exclude Type from Import
2N=2NUSA	Special	Special	Special	Product	3 Final	
A&H=Allen & Heath	A0=Audio	3R%=Labor Consulting	3R%=3rd Party Consult	3R%=Product	3R%=3 Final	AD%
A&K=Astell & Kern	A1=Audio	4K1=Video 4k LCD TV	4K1=4k LCD TV < 32"	4K1=Product	4K1=3 Final	@D%
AAUTH=Audio Authority	A2=Audio	4K2=Video 4k LCD TV	4K2=4k LCD TV 32" - 49"	4K2=Product	4K2=3 Final	AG%
ACCES=Access Networks	A3=Audio	4K3=Video 4k LCD TV	4K3=4k LCD TV 50" - 60"	4K3=Product	4K3=3 Final	@G%
ACE=Ace Backstage	A4=Audio	4K4=Video 4k LCD TV	4K4=4k LCD TV > 60"	4K4=Product	4K4=3 Final	@S%
ACER=Acer	A5=Audio	70V=Comm Audio	70V=70v Amplifier	70V=Product	70V=3 Final	BF%
ACTTM=Active Thermal Mgmt	A6=Audio	8K1=Video 8k LCD TV	8K1=8K LCD TV <=31"	8K1=Product	8K1=3 Final	CLO

- Add Show TYL Product Library Header Display Option on all Product Library List screens
- Add Show TYL Product Library Header Sort Option on all Product Library List screens

Find Products Show Makes ☒ Groups ☒ Hidden ☐ Product Library - Line List Utilities

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

A Product Class Hidden Products
B Part Phantom Discontinued
C Bulk PreCut Supplements Found 61 Total 61

EME audio & video

Add Product Inventory Utility Lists Print Menu

Fav Groups View
Class Discipline Cat Type Supplements Make Model : SKU Description Finish Sell Price TYL Tag

Message

Sort Tyler Status

Cancel Sort

A	Audio	Speak	Center									399.00 ea	
A	Audio	Speak	Floor									499.00 ea	
A	Audio	Speak	Books									450.00 ea	
A	Audio	Speak	Power									1,000.00 ea	
A	Audio	Multi	Key									600.00 ea	
A	Audio	Ampli	Surrou									5,500.00 ea	A
A	Audio	Speak	On-Wa									325.00 ea	
A	Audio	Ampli	Multi-c									2,750.00 ea	C
A	Audio	Ampli	Preamplifier									7,995.00 ea	
A	Audio	Speak	Powered Subwoofer									4,950.00 ea	
A	Audio	Misc	Final Part									255.00 ea	
	Wire	Pre-C	Interconnect									120.00 pr	B

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

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

Copyright 2000 - 2021 Version 9.1v4
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Exit

Horizon
SmartPartner
Software License

Done

All Modules Accessible

Horizon Software

President/Developer
Jim Engandela

Office Manager
Sandy Engandela

Programming
Jim Engandela
Dave Dowling

Technical Support
Jim Engandela
Dave Dowling
Joel Roberts

Office Hours
Monday - Friday

Subscription Renewal

Subscription 90 Days Left

Please enter the email address of the person in your company that you want to receive the Code Renewal Notice, so that they can request a new Code from Horizon

Enter your Web Code Request ID

Request New Code from the Web

Email Horizon for a New Code

Call Horizon for a New Code

Copy Current Code
73805319998

Horizon Support Policy

Support Policy

Online Support

1. Call Horizon Software
2. Enter the ID provided by Horizon
3. Click on the Live Help button

Fast Support ID

Go To Meeting ID

click here for
LIVE HELP

Send Email

Send to Horizon

Current SCPS 15.0v2 – 15.0v5 Features & Enhancement Details


All Modules/Home Button: Change "Leave" Button label to "Home" and remove small Home Button



Find Proposals			Fav A			B	C	Proposals																Sort		▼ ▲ ▼ ▲		Print		?
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				
Administrator			<div><div>EME audio & video</div><div>8 Proposals</div><div>X = User Unlock</div><div>User: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems</div></div>																						Add Proposal		Home			
Manager																									Sale Probability		Projects			
User																											Completed			
Archive + Proposal																									= Global Proposal					
<div><div><div>Dup</div><div>Fav</div><div>Status</div><div>Created</div><div>Number</div><div>User</div><div>View</div><div>Client</div><div>Company</div><div>Proposal Title</div><div>Total</div></div></div>																														
<div><div>3/4/2021</div><div>1296.1-1.100</div><div>Back, Eileen</div><div>Home Entertainment</div><div>\$1,397</div></div>																														
<div><div>6/23/2020</div><div>1293.1-1.100</div><div>Engandela, Jim</div><div>Home Entertainment</div><div>\$32,783</div></div>		Horizon Software																												
<div><div>4/29/2020</div><div>1290.1-1.100</div><div>Back, Eileen</div><div>Home Entertainment</div><div>\$8,624</div></div>																														
<div><div>9/12/2006</div><div>1283.1-1.100</div><div>Callahan, Hayes</div><div>Home Theater System</div><div>\$30,647</div></div>																														

Proposal List: Expand Proposal Number field

All screens that display the Proposal number now display more digits

Find Proposals				Fav A				B	C	Proposals																Sort					Print	?	Home
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							
Administrator		<div><p>1413 Proposals</p><p>X = User Unlock</p><p>= Global Proposal</p><p>User: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems</p></div>														Add Proposal		Leave															
Manager																Projects																	
User																Completed																	
Archive Proposal																																	
		Dup	Fav	Status	Created	Number	User	View	Client	Company	Proposal Title	Total																					
						3/18/2021	13618.1-05.970		Hile, Michael			\$30,993																					
						3/18/2021	13617.1-05.970					\$30,993																					

Proposal List/Archive: Archive message

Make message clearer on how to Archive a Proposal

Proposals

Find Proposals Fav A B C Sort Print ?

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

Administrator
Manager
User
Archive Proposal

8 Proposals
X = User Unlock
= Global Proposal

EME audio & video

User: Jim Engandela - 100 - Level: Administrator
Location: 1 - EME Audio & Video Systems

Add Proposal
Sale Probability

Home
Projects
Completed

Message

Archiving a Proposal moves it to the Archive List
Archived Proposals can be moved back to the Proposal List
Check the Boxes next to the Proposals you want to Archive
Then Click on the Archive Icon below the arrow.

OK

Dup	Fav	Status	Created	Number	User	View	Client	Company	Proposal Title	Total
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/4/20						nt	\$1,397
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6/23/20						nt	\$18,296
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4/29/20						nt	\$8,624
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20						stem	\$30,647
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20							\$30,647
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20						stem	\$24,590
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20						nt	\$69,316
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/11/20						nt	\$57,452

Proposal/Project/Find: Speed up Finding routine

Proposals

Find Proposals Fav A B C Sort Print ? Home

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

Administrator
Manager
User
Archive Proposal

8 Proposals
X = User Unlock
= Global Proposal

EME audio & video

User: Jim Engandela - 100 - Level: Administrator
Location: 1 - EME Audio & Video Systems

Add Proposal
Sale Probability

Leave
Projects
Completed

Dup	Fav	Status	Created	Number	User	View	Client	Company	Proposal Title	Total
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/4/2021	1296.1-1.100			Back, Eileen		Home Entertainment	\$1,397
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6/23/2020	1293.1-1.100			Engandela, Jim	Horizon Software	Home Entertainment	\$32,783

Proposal/Print Menu/Cover Page: Remove Blank 2nd page

- Tighten bottom page margin to remove a Blank 2nd page when printing the cover page
- This done for both the Regular and Custom Cover Pages

Project/Print Menu/Projects: Staging Reports Fix

The Staging Reports no longer freeze if there are no Wire Supplements

Printer Setup PDF reDirect Copy

Proposal - Print Menu - Project Shop

CutePDF Writer, winspool, CPW3: Steve Nelson Done

COA - Central Vacuum System 6009.2-1.AP Project Approval Wire Manager

Proposals Projects Purchasing Costing

Project Info

- Client/Project Info
- Project Site Directions
- Project Tax Summary
- Product Warranties
- Product Cut Sheets
- Product Specifications
- Product Specifications (By Area)
- Quality Control by Phase
- Product Install Tasks
- Master Product Delivery Form
- Project Purchase Order Summary

Project Staging

Select Phases

- ☒ 1 Prewire
- ☒ 2 Trim
- ☒ 3 Final

☐ Hide Product Staging Report Pricing

Staging by Make-Model (Total Qty)

- Print All
- Product Staging
- Part Staging
- Wire Staging

Staging by Zone-Area (Total Qty)

- Print All
- Product Staging
- Part Staging
- Wire Staging

Project Reconciliation

All Project Products with Change Orders

Project Summaries with Change Orders

Sum Mode
Combines like kind items, with Sum Qty

Project Mode
Shows each Project & CO item with CO Number & Unit Qty

Select
Sum or Project Mode then Print

Sum Proj

- Project Products
- Project Parts
- Project Wire

Project Summary & Export

Project/Final CO/Print Menu: Enable Hide Prices

You can now choose to the Hide Sell Price on Products in Final Change Orders

Print CO with Separate Products and Product Supplements

By Discipline By Area By Phase

CO Purchase Order

Final CO - Print Options - View

John & Mary Smith

Home Entertainment System 1284.1c2-1.100

CO: C2 Home Entertainment System

PDF reDirect Pro v2, winspool, Ne01:

Print All CO Sections

Change Order Over Views Fees

Done Other Reports

Change Order

Pending CO Title

Entering a title will override the default title for this CO and will not affect the Master Project title.

☐ Show Original Area Text in addition to the CO Area Text

3/11/2021

☐ Report Date - Lock

Areas & Products Report - Formatting

☒ Yes ☐ No Page Break after each Area

☐ Sort Areas = Zone/Location/Placement/Area Normal Sort = Location/Zone/Placement/Area

☐ Hide Area Text and Show Products

☐ Show Area Text and Hide Products

☐ Hide Products Discipline

Product Listing

A1 Make-Model-Description-Finish

Areas & Products Pricing

Show Item Prices

- ☐ Product : Ext Sell
- ☐ Product/Parts/Wire : Ext Sell
- ☐ Product + Product Labor : Ext Sell
- ☐ Product/Parts/Wire + Product/Parts/Wire Labor : Ext Sell
- ☐ Product : Ext List
- ☒ Hide Sell Price

Area Totals ☐ Show Area Totals ☒ Hide Area Totals

Home Entertainment System
Change Order
John & Mary Smith

Zone 1 - Home Theater

Audio	Qty	Ext. Price
Linn : Classik Musio-S : Integrated CD player/tuner/preamp/power amplifier : Silver	1 ea	
Linn : Klimax Chakra 500 Twin-BindPost : Klimax two-channel power amplifier : Silver	1 ea	
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	1 ea	

Products/Parts & Wire Supplements: Change Labor Time Option

You can now change the Parts and Wire Supplement Labor Time from the Product Parts and Wire Supplement screens.

[illegible]

Product Library/Find Products/Advanced Find: Show Do Not Hide Option

Find Products

Show: Makes☒ Groups☒ Hidden☐

Product Library - Line List

Utilities

Home

All

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

A

Product

Class

Hidden Products

Discontinued

Supplements

Found 61

Total 61

EME

audio & video

Add Product

Detail List

Leave

Bulk

PreCut

Lab

Part

Wire

Inventory

Utility Lists

Product Sets

Print Menu

Fav

Groups

Class

Discipline

Cat

Type

Supplements

View

Make

Model : SKU

Description

Finish

Sell Price

Inv

Tag

A	Audio	Speak	Center Channel		Klipsch	RC-35	Center Channel	Black	399.00 ea	
A	Audio	Speak	Floor		Klipsch	RF-35 (6483)	Reference	Black	499.00 ea	
A	Audio	Speak	Bookshelf		Klipsch	RS-7	Reference	Matte	450.00 ea	
A	Audio	Speak	Powered Subwoofer		Klipsch	RSW-10	Reference	Black	1,000.00 ea	
A	Audio	Multi	Keypad		Linn	5101 Personal Handset	Universal	Black	600.00 ea	

Update Makes & Groups

Product Library - Find Products

Clear All Find Fields

Cancel

Choose Advanced Criteria

Enter Full or Partial

Make, Model, SKU or Description

Fast Find All Products

Fast Find Only Hidden

Fast Find

Vendor

Install Phase

Pick Criteria

Pick Make, Model, SKU or Group

Pick Find All Products

Pick Find Only Hidden

Pick Find

Multiple Makes

Pick Make - Model

First Pick a Make, then Model or SKU

Make

Model

SKU

Pick Product Group

Pick a Discipline, Category, Type or Group

Discipline

Category

Type

Product Library - Choose more Criteria

Clear All Find Fields

Cancel

Enter your find criteria

Then click a find button

Find All

Find Hidden

Find Regular

Make

Klipsch

Model

RC-35

SKU

Description

Center Channel Speaker

Features

This center channel has been engineered to deliver all the detail, subtleties and dynamics required for the ultimate home theater experience. It delivers detailed, subtle and thrilling sounds through dual 6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The tweeter is coupled to an exclusive Klipsch square Tractrix® Horn that boosts the driver's already high sensitivity, while minimizing room interactions that cause a loss of sonic detail. Contemporary black wood grain vinyl finish.

Unit

ea

Cost

\$210.00

Sell

\$399.00

Minimum Sell

Show without Make or Model

Show without Group

Show without Discipline

Show without Category

Show without Type

Show without Class

Show New Items

Show New RCMS Items

Show Omitted

Show Discontinued Product

Show Fee SKU

Show Do Not Hide

Product Library/Details List: Change Leave to Done button

Find Products		Show Makes		Groups	Hidden	Product Library - Detail List																		Utilities		Home		
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		
A	Product Class		Hidden Products		<div>EME audio & video</div>																		Add Product		Line List	Done		
B	Part		Discontinued																				Recent Products		Inventory		Product Sets	
C	Bulk		PreCut																				Utility Lists		Print Menu			
				Supplements		Found 34																						
				Total 61																								
				Lab		Part		Wire																				
Fav		Groups		View		Suppliments		Make		Model : SKU		Description		Finish		Sell Price		Inv		Tag								
Class		Discipline		Cat		Type		Created		Vendor		Phase				Installed		Cue		Hide		GP%						
A	Audio	Speak	Center Channel			Klipsch	RC-35	Center Channel Black	399.00 ea																			
		Prewire	Trim	Final	Total	Product	Parts	Wire	Product Sell	\$399.00 ea																		
		0:00:00	0:00:00	0:20:00 =	0:20:00	\$399.00	\$1,155.00	\$633.00	Parts & Wire	\$1,788.00	47.4%																	
				\$20.00 =	\$20.00	\$20.00	\$0.97	\$127.50	Labor Total	\$148.47																		
		1/28/2005		Klipsch Audio	3	\$419.00	\$1,155.97	\$760.50	Installed Total	\$2,335.47	42.2%																	

Product Library - Detail List																								
Find Products																								
Show Makes Groups Hidden																								
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																								
A Product Class Hidden Products																								
B Part Phantom Discontinued																								
C Bulk PreCut Supplements Found 34 Total 61																								
Lab Part Wire																								
Fav Groups View																								
Class Discipline Cat Type Created																								
Header																								
M4 zi zi short zi short zi shortType.c																								
pd.picture.front																								
Body																								
<div> <div> Specify Button </div> <div> In Browse or Find mode, clicking on the selected set of objects will: </div> <div> <div> Do Nothing </div> <div> Control </div> <div> Perform Script </div> <div> Resume Script </div> <div> Exit Script </div> <div> Halt Script </div> <div> If </div> <div> Else </div> </div> <div> Options </div> <div> Specify: </div> <div> navx.go logo screen </div> <div> Pause </div> <div> nav.detailList </div> <div> nav.lineList.fromDetailList </div> <div> nav.lineListView </div> <div> nav.pickList </div> </div>																								

Products/AlphaFinder: Redesign AlphaFind screen - Add Features

- screen for ease of use and added Class column to Group Portal.
- Update Makes utility is now in the upper left corner. Moved the Change Make Name Utility to the Utility screen
- Clicking anywhere on a Group will find all of the Products in that Group.

Update Makes Show Hidden ☐ Product Library - AlphaFind by Make = L Show Groups ☒ Cancel

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

Pick All Linn

Pick a Group of Products Linn

Pick Make Discipline Category Type Class

Linn Audio Amplifier Multi-channel Product

Linn Audio Amplifier Preamplifier Product

Linn Audio Amplifier Stereo Product

Linn Audio Amplifier Surround Processor Product

Linn Audio Amplifier Surround Receiver Product

Linn Audio Control Multi-channel Product

Linn Audio Misc Final Part Part

Linn Audio Misc Trim Part Part

Linn Audio Multi-room Controller Product

An AlphaFind button has been added to all Product List screens. This button will return you to the AlphaFind screen with the previously selected Make/Groups

Find Products Show: Makes ☒ Groups ☒ Hidden ☐ Product Library - Line List AlphaFind Utilities

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

Product Class Hidden Products

Part Phantom Discontinued

Bulk PreCut Supplements Found 38 Total 62

Lab Part Wire

EME audio & video

Add Product Detail List Home

Inventory Utility Lists Product Sets Print Menu

Fav Groups View Sell Price Inv Tag

Class Discipline Cat Type Supplements Make Model : SKU Description Finish Installed Cue Hide

Audio Multi Keypad Linn 5101 Personal Handset Universal Black 600.00 ea

Audio Ampli Surround Processor Linn 5103 System Controller Linn 5103 inc 5,500.00 ea

Audio Speak On-Wall Linn 5110-W Pair of on-wall White 325.00 ea

An AlphaFind button has been added to the Product Detail screen. This button enables you select Makes/Groups and return to this screen

<input type="text" value="Find Products"/> <input type="button" value="Replace Data"/>		Product Library - Product Detail		1 of 1 <input type="text" value="AlphaFind"/> <input type="button" value="Home"/>
<input type="button" value="Update Supplements"/> <input type="button" value="Delete Product"/>	Created: 1/8/2002 Sell Updated: 6/2/2011 Cost Updated: 6/2/2011	Linn Katan Bookshelf loudspeakers: pair Audio : Speaker : Bookshelf		<input type="button" value="Add Product"/> <input type="button" value="Duplicate Product"/>
<input type="button" value="Done"/> <input type="button" value="Prev"/> <input type="button" value="Next"/>				
<div style="display: flex; justify-content: space-between; padding: 0 10px;"> Product Specs Pix PDF Labor Parts Wire Tasks </div>				
Make <input type="text" value="Linn"/> ?		Unit Sell <input type="text" value="\$995.00 pr"/>		
Model <input type="text" value="Katan"/>		Installed Sell <input type="text" value="\$1,258.00 pr"/>		
SKU <input type="text"/>				
Finish <input type="text" value="Black"/>				
Description <input type="text" value="Bookshelf loudspeakers: pair"/>				
Features <input checked="" type="checkbox"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> The Katan loudspeaker is an attractive, compact, two-way bass reflex loudspeaker designed for multi-channel applications. </div>				
Cue Notes <input type="button" value="Info"/>				
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Group</p> <p><input type="text" value="Audio : Speaker : Bookshelf"/></p> <p>Class <input type="text" value="Product"/></p> <p>Phase <input type="text" value="3 Final"/></p> <p>Product Status</p> <div style="display: flex; justify-content: space-between;"> <div> Phantom Product <input type="checkbox"/> ? QB Fee SKU <input type="checkbox"/> ? Favorite <input type="text" value="A"/> </div> <div> New Item <input type="checkbox"/> Discontinued Item <input type="checkbox"/> Hide this Item <input type="checkbox"/> Do not Hide <input type="checkbox"/> ? Do not Delete <input type="checkbox"/> </div> </div> <p style="color: red; font-weight: bold;">This Product is In a Proposal/Project/Change Order</p> <p>Proposal Options</p> <div style="display: flex; justify-content: space-between;"> <div> Area Sort Order <input type="text" value="m"/> Product Tax Override Tax A <input type="text" value="T"/> Tax B <input type="text" value="T"/> Tax C <input type="text"/> Labor Tax Override <input type="checkbox"/> ? </div> <div> Do not Discount <input type="checkbox"/> Hide Printed Price <input type="checkbox"/> Exclude Product Price <input type="checkbox"/> ? Zero All Supplement \$ <input type="checkbox"/> ? Do not Purchase or Install <input type="checkbox"/> ? Issue Install Staple Up Card <input type="checkbox"/> ? </div> </div> </div> </div>				

Listen Up: Tyler: Increase Column Widths and Screen Optimization to accommodate more text

Change Order Builder									
John & Mary Smith						CO Status C = Changed A = Added D = Deleted		Done	
Home Entertainment System 1284.1-1.100									
Labor		Parts		Wire		Master Project			
Pick Area Location Zone Areas				Add Products & Supplements to Area		Zone 1 - Home Theater		Unit Sell	
Area Location Zone Areas				Status Change Qty + - Qty		Make : Model Finish		Ext Sell	
1 Home Theater				Audio 1 ea		Linn : 5125		\$2,750.00	
2 Living Room				Amplifier : Multi-channel		Five channel power amplifier (Black)		\$2,750.00	
3 Office				A 1 ea		Linn : Classik Music-S		\$1,550.00	
4 Dining Room				Audio Silver		Integrated CD		\$1,550.00	
4 Kitchen				Source : CD Player		Shop Notes			
5 Master Bedroom				Audio 5 pr		Linn : Katan		\$995.00	
5 Master Bathroom				Speaker : Bookshelf		Bookshelf loudspeakers: pair		\$4,975.00	
				A 1 ea		Linn : Klimax Chakra 500		\$7,995.00	
				Audio Silver		Klimax two-channel power amplifier		\$7,995.00	
				Amplifier : Stereo		Shop Notes			
				A 1 ea		Linn : Melodik		\$4,950.00	
				Audio Black		Aktive isobarik bass extension		\$4,950.00	
				Speaker : Powered Subwoofe		Shop Notes			
Super View		Area Sum		Prod Sum		Pending Change Order		Grand Total	
Areas		Text		Products		John & Mary Smith		Equipment \$10,900.00	
Labor		Parts		Wire		Home Entertainment System		Installation \$390.00	
						1284.1c1-1.100		Misc. Parts \$285.00	
						Zone 2 - Living Room Total:		\$11,575.00	
Loc Zone		Areas		Add Area No Product Prompt		Zone 2 - Living Room		Unit Sell Tag-Del	
Pick or Type Area		Max 40 Characters				Products Sets Supplements		Ext Sell	
Location Zone Sort Pick Area		Rename Dup Del		Discipline Cat.Type Status Sort View Qty Make : Model Sort					
0 Balcony				Audio A m 1 Klipsch : RSW-10				\$1,000.00	
0 Bathroom 5				Speaker : Black Ash ea Reference Subwoofer				\$1,000.00	
2 Living Room				CO Notes Shop Notes					
3 Office				Audio A m 2 Linn : Melodik				\$4,950.00	
4 Dining Room				Speaker : Black ea Aktive isobarik bass extension				\$9,900.00	
				CO Notes Shop Notes					

Pending Change Order - Select CO Quantity

John & Mary Smith

1 - Home Theater

Linn : Classik Music-S

Audio : Source : CD Player

Continue 

Master Project - Product

Make

Model

SKU

Finish

Description

Project
Product Qty

Project
Product Sell

Net Product Qty

Pending Change Order - Product

Change Order Conditions

Quantity cannot be Empty or 0

Negative Qty items cannot be greater than the Original Qty.

Negative Qty items Price must be the same as the Original Sell Price.

Add or Subtract
a Quantity

Change Order
Product Sell Price

Change Order Notes
for this Product

Project/Pending CO/Areas: Improve GUI

Clear All Area Text 1 Pending CO - Area Text for Client Mode ☐ ? Home

John & Mary Smith

Home Entertainment System 1284.1c1-1.100

Areas Text Products Labor Parts Wire Tasks

1 - Pick Area Zone 1 - Home Theater

2 - Pick Text Category

3 - Pick Text Control

Atrium
Balcony
Bathroom 5
Bathroom 2
Bedroom 4
Bedroom 5
Zone 1 - Home Theater
Zone 2 - Living Room
Zone 3 - Office
Zone 4 - Dining Room

Audio
Commercial Sound
Control
Installations
Jacks
Racks
Rooms
Security
Systems
Vacuum
Video

Auto a/b switch
IR remote control
Keypad control
Manual a/b switch
Volume control

Area Products
White fields = Editable WO Product Install Notes
Gray fields = Permanent Product Install Notes

Proposal - Area Text for:
Zone 1 - Home Theater

Add to Library

Linn : Classik Music-S A

A wall mounted keypad will control the selection of source music from the main components and most functions such as play, stop and track selection.

Proposal/ Product/Detail: Add Area Button

To return to the Areas & Products screen

Delete Product Client Mode ☐ Proposal - Product Detail Reset Labor 3 of 28 ? Home

Thomas Dow Chippewa Valley Eye Clinic 1273.1-1.100

Linn : Melodik
Audio : Speaker : Powered Subwoofer

Areas Text Products Labor Parts Wire Tasks

1 - Home Theater

Product Specs Ptx - PDF's Labor Parts Wire Tasks

Qty 1
Make Linn
Model Melodik
SKU
Finish Black
Description Active isobarik bass extension loudspeaker
Proposal

Sell Price \$4,504.50 ea
Like Kind Modifier ?

Group Audio : Speaker : Powered Subwoofer
Change Group Original Group Audio
Product Classification Product
Primary Install Phase 3 Final
Tax A T Tax B T Tax C Labor Tax Override ?

Proposal/Print Menu/Custom Reports: Delete Report Records

Delete Report file records when leaving the Reports file so they don't build up.

Project CO: Payment option with negative CO Amount

When clicking on the OK-Cancel button you are now returned to the Change Order instead of the Fast Open screen.

Discipline	Area	Phase	Final CO - Detail by Area				Utilities		Home
Client	Areas	CO Fees	John & Mary Smith				Pricing	Invoicing	Done
Project	Info	Products	Home Entertainment System				Payments	Purchasing	Tracker
Contacts	Log	Supplements	1284.1c3-1.100				Install Notes	Work Orders	Print Menu
Client Mode	Super Views	QVE	QVC	QVP	Status: Review	Final CO	Wire Manager	Change Orders	Labor Total
Discipline : Category : Type	CO#3	Qty	Make : Model	Finish	Description				Grand Total
Home Entertainment System Change Order 1284.1c3-1.100									
Zone 4 - Dining Room									-\$1,305.00
Autom : Contr : Keypad	D c3	-1 ea	Linn : Knekt RCU	White	Knekt room control unit				-750.00

Message

This Change Order has a Negative Total.
Payments made to Change Orders with Negative Totals should be made in the Master Project Payment screen.

CO Payments

OK-Cancel

Project/Final CO/Print Menu/Reports: Fix Other Reports Subtotals

Print CO with Separate Products and Product Supplements

Final CO - Print Options - View

Print All CO Sections

Printer Setup

By Discipline

By Area

By Phase

John & Mary Smith

Change Order

Over Views

Fees

Done

CO Purchase Order

Home Entertainment System

PDF reDirect Pro v2

Other Reports

Change Order

Product Listing

Pending CO Title

A1 Make-Model-Description-Finish

Entering a title will override the default title for this CO

Final CO Other Reports - Print/Preview and stay in CO

You now stay in the correct Final Change Order after printing or previewing Other Reports.

Printer Setup PDF reDirect Copy			Proposal - Print Menu		User Reports Refresh ? Home	
PDF reDirect Pro v2, winspool, Ne01:			Jim Engandela Horizon Software Home Entertainment System 1293.1-1.100		Status: Progress Send Email: <input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer	
Proposals Projects Purchasing Costing					Done Page Prefs Print Options	

Main Proposal Print All Sections			Proposal Reports Print All Sections			Proposal Supplements Print All Sections		
Proposal Sections Cover Page Client Intro Shop Info Overviews Areas & Products - Ext Price No Dups ? Areas & Products - Unit & Ext Price Areas & Products - No Prices Area Totals - No Area Text or Products Area Totals - Area Text - No Products <input type="checkbox"/> Hide Grand Total Areas & Products - Text & Totals Product Summary Show Grand Total <input type="checkbox"/> Hide Disciplines Show Discipline Subtotals Show Grand Total <input type="checkbox"/> Hide Grand Total <input type="checkbox"/> Page Break by Discipline Fees & Services Contract <input type="checkbox"/> Show 2nd Address <input type="checkbox"/> Show Both Addresses Extra Text			Products By Discipline Area Phase Sub Totals By Discipline Area Phase Grand Total By Discipline Area Phase Product Summary with Unit & Ext Pices Product Summary - Unit & Ext Tyler <input type="checkbox"/> Hide Unit Price <input type="checkbox"/> Hide Disciplines <input type="checkbox"/> Page Break by Discipline Product Summary - Unit & Ext Discipline Subtotals & Grand Total <input type="checkbox"/> Hide Unit Price <input type="checkbox"/> Hide Grand Total <input type="checkbox"/> Page Break by Discipline Preliminary Contract Preliminary Contract with Options Area Text & Totals, Disclaimer Pricing Policy Price Expiry Date No Payments or Terms Tax & Totals Options			Supplements Labor Detail Labor Summary Parts Detail Parts Summary Wire & Cable Detail Wire & Cable Summary Fees - Directed to Parts Fees - Directed to Labor Master Proposal with Supplements Discipline Areas With Area & Grand Totals Products & Only Labor Products & Supplements without Prices Areas by Phase Phase		

Tyler ProdUpdater: Add Warning Messages

Master Prefs - Accounting - Tyler Export Equivalents Print ? Home

Tyler Auto Import Setting Tyler Value Lists Current version in use: FileMaker Pro 6.0v4 Dev
Import uses FileMaker 6.0 - Auto Import uses Events Plug In

Blank Tyler Items to Fix Copy Text Clear Text

Last Import: 4/26/2007 6:58:11 AM

Importing Options

Delete - Hide Conditions

All Products in the SCPS Product Library
Unless they are in a Proposal/Project/Client
In that case they will simply be Hidden
All Products in the SCPS Product Library
Group and Descriptions, unless their Product

Checking these "Do Not Update" boxes

☐ Do not Update All Product Classes
☐ Do not Update All Product Groups with Tyler Department
☐ Do not Update All Product Descriptions with Tyler Descriptions
☒ Do not Delete all ProdUpdater Records after Import Routine (default = unchecked)

Only Run Auto Import with this User
☒ Jim Engandela
☐ Dave Jackson

Tyler or SCPS Import File Path Option
☐ SCPS Folder
☒ LU Folder

Return to Logo Screen after "Auto Run" Import Routine default = checked ☒

Do not run Auto Import Routine ☒
Global Temp ☐
default = uncheck both

Header instead of "Inventory Qty" in Product Library ☐

Message

Caution!

These screens are for programming purposes and reference only.
Please do not change any data or run any button routines on this screen.

OK Cancel

Blank Tyler Items to Fix

This is a Notification that the Tyler Product Import contains records with fields that are Blank.

Updated as soon as possible for the next Tyler - SCPS

es >> Make, Dept, Category, Type, Class, Phase
Status, Unit, Unit Sell, Unit Sell Min, Unit Cost.

e ID=Make >> Status
Category >> Type >> Class >> Phase >> Status
ke ID=Make >> Status
ke ID=Make >> Status
ke ID=Make >> Status
ke ID=Make >> Status
ke ID=Make >> Status

Tyler Blank Product Notification

Enable Auto Email ☐ First Install SMPIT Plug in

Email Address

Horizon eMail Dave J eMail Darren eMail Email Test

Add Messages

Proposal/Area: Rename Area Fix

Proposal - Areas & Products Client Mode Grand Total ? Home

Jim Engandela
Horizon Software
Home Entertainment System
1293.1-1.100

Products Labor Parts Wire
Area Total \$16,789.00

Four Seasons Room

Discipline Category Type

Audio	Speaker - Center Channel	1 ea	Klipsch : RC-35	\$399.00
Audio	Speaker - Powered Subwoofer	2 ea	Klipsch : RSW-10	\$1,000.00
Audio	Multi-room - Keypad	1 ea	Linn : 5101 Personal Handset	\$600.00
			Black Ash - Center Channel Speaker	\$399.00
			Black Ash - Reference Subwoofer	\$2,000.00
			Black - Universal learning remote	\$600.00

Location Zone Sort

Max 40 Characters

Location Zone Sort

0 m Bungalow

0 m Four Seasons Room

Product Library: Fix Group Find Routine to find Groups for 1 Make

Product Library - AlphaFind by Make = G Cancel

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

Pick All Generic

Pick a Group of Generic Products

Pick Make

Discipline Category Type

Galaxy Audio	Accessories	Wire & Cable	Connectors/terms
Gator Cases	Accessories	Wire & Cable	Generic Bulk Wire
Gefen	Accessories	Wire & Cable	Generic Cables
Genelec	Commercial	Comm Misc	Comm Miscellaneous
Generic			
Gingko			
GMATRIX			
Golden Ear			

Product Library: Fix Update Supplement Prices Utility

Product Library Utility - Reset & Update

61 of 61 ?

Done

Clean Groom

Reset Update

Find Change

General Import

User Import

Accounting Import

Distributor Import

Export Products

Reset - Net Cost based on Exchange Rate

If an exchange rate is entered into the Master Prefs/Other/Products 2 screen, and there are costs in the Optional Cost field on the Product Detail screen, then the Net Cost on that product will be set to the Optional Cost times the Exchange Rate.

Reset Net Cost with Exchange Rate

Reset - Products to "Issue Staple Up Cards"

This will set all of the Products in the Product Library to "Issue Staple Up Cards" in Proposals and Projects.

Reset Staple Cards

Reset - Override Product Labor to Group Labor

Reset - Products

This will reset all the Override Labor on all Products to the Labor assigned by the Product Group.

Reset Override Labor

Update - AlphaFinder Make List

This utility will enable you to view all of the Makes in the Product Library when using the Find Product feature

Update Makes & Groups

Update - "Classifications" on All Products

This utility will update the Product Classification on All Products in the Product Library to the current settings in the Master Prefs/Groups.

Update Class

Update - All Parts and Wire "Prices"

Manually changing the price of a Part or Wire will not display the new price on the Products, they are attached to as supplements, unless you run this utility.

However the new Part & Wire prices will be correct when adding Products to a Proposal. Existing Proposal & Products are not affected by running this utility.

Update All Parts & Wire Supplement Prices

Edit Group Parts

Product Library - Parts Supplements
2 of 61
Home

Class Product
Phase 3 Final

aaaaPosting Test
1111
Audio : Amplifier : Integrated Amplifier

Done
Prev
Next

Update All Parts & Wire Supplement Prices

Product
Specs
Px
PDF
Labor
Parts
Wire
Tasks

Phantom Product

Group Parts
☐ Do not use Group Parts

Qty
Unit
Make
Model
Description
Phase
Unit Sell
Ext Sell

1
ea
Linn
Aktiv Modules
Stereo or twin mono Aktive
3 Final
\$300.00
\$300.00

No Labor
Unit Time
Extended Ext Time
Ext Sell

☐
0:15:00
0:15:00
\$12.50

Edit Group Wire		Product Library - Wire & Pre-Cut Supplements					2 of 61		Home						
Class Product		aaaaPosting Test							Done		<div>Update All Parts & Wire Supplement Prices</div>				
Phase 3 Final		1111							Prev Next						
		Audio : Amplifier : Integrated Amplifier													
Product		Specs		Pix		PDF		Labor		Parts		Wire		Tasks	
Group Wire & Pre-Cut <input type="checkbox"/> Do not use Group Wire										Wire & Pre-Cut Labor					
Class	Run Type	Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Sell	No Labor <input type="checkbox"/>	Unit Time	Extended Ext Time	Ext Sell		
Bulk	Home	150	ft	Linn	Bulk Analog	Analog interconnect	1	\$5.00	\$750.00	<input type="checkbox"/>	0:00:30	1:15:00	\$75.00		
Pre-Cut		1	pr	Linn	Black Interconnect	Pair of phono-phono	3	\$1.50	\$1.50	<input type="checkbox"/>	0:05:00	0:05:00	\$5.00		

Product Library: Supplements-Add Options & Speed

Find Products

Show: Makes ☒ Groups ☒ Hidden ☐

Product Library - Line List

AlphaFind

Utilities

?

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

A

Product Class

Hidden Products

Discontinued

Show Supplements

Found 58

Total 61

Lab

Part

Wire

Message

1 Show Products with Any Supplements

2 Show Products with Parts & Wire Supplements

3 Show Products with Parts & Wire & Labor Supplements

3 PWL

2 PW

1 Any

Fav

Groups

View

Class

Discipline

Cat

Type

Suppliments

Make

Price

Inv

Tag

stalled

Cue

Hide

B

Audio

Speak

Center Channel

Klipsch

Melodik

Center Channel Black

399.00 ea

B

Audio

Speak

Floor

Klipsch

RF-35 (6483)

Reference Black

499.00 ea

C

Audio

Speak

Bookshelf

Klipsch

RS-7

Reference Matte

450.00 ea

A

Audio

Speak

Powered Subwoofer

Klipsch

RSW-10

Reference Black

1,000.00 ea

A

Audio

Multi

Keypad

Linn

5101 Personal Handset

Universal Black

600.00 ea

A

Audio

Ampli

Surround Processor

Linn

5103 System Controller

Linn 5103 inc

5,500.00 ea

A

Audio

Speak

On-Wall

Linn

5110-W

Pair of on-wall White

325.00 ea

A

Audio

Ampli

Multi-channel

Linn

5125

Five channel Silver

2,750.00 ea

A

Audio

Ampli

Preamplifier

Linn

Klimax Chakra 500

Klimax Twin Silver

7,995.00 ea

A

Audio

Speak

Powered Subwoofer

Linn

Melodik

Aktive isobarik Black

4,950.00 ea

A

Audio

Misc

Final Part

Linn

Aktiv Modules

Stereo or twin

300.00 ea

Wire

Pre-C

Interconnect

Linn

Black Interconnect

Pair of Black

1.50 pr

A

Audio

Speak

Part

Linn

Classik Brakit (3459)

Wall bracket

40.00 pr

Wire

Bulk

Interconnect Cable

Linn

Bulk Analog interconnect

Analog Black

6.00 ft

B

Wire

Bulk

Interconnect Cable

Linn

Bulk Silver Cable

Silver analogue Silver

15.25 ft

A

Audio

Sourc

Phono

Linn

Cirkus Kit

Main bearing

645.00 ea

A

Audio

Sourc

CD Player

Linn

Classik Music-S

Integrated CD Silver

1,550.00 ea

A

Audio

Ampli

Surround Receiver

Linn

Classik Movie Di

Integrated Black

3,995.00 ea

Current SCPS 15.0v1 Features & Enhancement Details

Custom Proposal Reports: Blue Graphics

A version of the Custom Proposals is now available in Blue instead of Red. Please request this file from Horizon if you want Blue instead of Red.

Custom Reports



User Custom
Reports - Version
SCPS 14.6v1 Blue



HOME ENTERTAINMENT SYSTEM

Version 1

Designed and Prepared for

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

(W) 715-287-3335

Jim Engandela
President



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Ph: 715-287-3335 Fax: 715-287-4484 horizon@triwest.net www.horizon-software.com
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Proposal/Pricing/Cost: Repost Cost

Add repost cost routine to Cost button so Proposal Cost numbers are correct

Client Mode ☐ **Proposal - Pricing** **Mr. Jim Engandela**
Horizon Software
Home Entertainment System
1293.1-1.100

Pricing	Labor	Commissions
Tax Summary	Product Tax	Fees Tax

Excluded Products Totals	Labor Meter	Subtotals	Sell	Discount	Total Labor Time
		Equipment	\$21,190.00		36:25:00
		Installation	\$3,015.00		
		Misc. Parts	\$2,650.00		
		Wire & Cable	\$4,234.90		
		Fees	\$0.00		
		Total	\$31,089.90		
		PST Tax	\$1,693.44		
		Tax B	\$0.00		
		Tax C	\$0.00		
		Tax	\$1,693.44		
		Grand Total	\$32,783.34		

Cost

Adjust Grand Total

☒ yes ☐ no Show Sales Tax
☒ yes ☐ no Show List Price & Discount

Product Library/Labor: Convert Product Labor Amount to Time

- You can now enter an Amount and automatically set the Labor Time so that it equals the Amount your entered.
- When you click on the Arrow next to the Labor Category you will be prompted to select the Phase you want to apply the Amount to.

Edit Group Labor 1 **Product Library - Override Labor Supplements** 1 of 58 **Done**

Note: Product must have a Classification and Install Phase for Supplemental Labor to be Added to a Proposal

Klipsch
RC-35
Center Channel Speaker
Audio : Speaker : Center Channel

Product	Specs	Pix	PDF	Labor	Parts	Wire	Tasks
----------------	--------------	------------	------------	--------------	--------------	-------------	--------------

Manual Override Labor

Proposal Labor Tax Override ☐

Audio : Speaker : Center Channel

Classification: Product

Primary Install Phase: 3 Final

	Labor Categories	Default Labor Rate	Override Labor Time (hrs:min:sec)			
			Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	
	1 - Installation	\$60.00	0:00:00	0:00:00	4:10:00	
	2 - Programming	\$80.00	0:00:00	3:07:30	0:00:00	
	3 - Training	\$100.00	2:30:00	0:00:00	0:00:00	

Convert Amount to Labor Time
Enter Amount.
Click Arrow
\$250.00

Reset All Labor to Group Labor

DOD = 1
Apply DOD 2 Avg 10%
Apply DOD 3 Avg 50%

Total Labor Time	2:30:00	3:07:30	4:10:00	=	9:47:30 Total Hrs
Total Labor Sell	\$250.00	\$250.00	\$250.00	=	\$750.00 Total
					49.6% GP%

Product Library: Add Class and Phase display to all Product Detail screens

Edit Group Labor1

Product Library - Group Labor Supplements6 of 58?

Home

Class Product

Phase 3 Final

Note: Product must have a Classification and Install Phase for Supplemental Labor to be Added to a Proposal

Linn

5103 System Controller

Linn 5103 inc DTS, no RF demodulator (Black)

Audio : Amplifier : Surround Processor

Done

PrevNext

Product

Specs

Pix

PDF

Labor

Parts

Wire

Tasks

Group Assigned Labor

Proposal Labor Tax Override ? ☐

Audio : Amplifier : Surround Processor

Classification: Product

Primary Install Phase: 3 Final

Do not use Group Labor ☐

Product Library/Utility: Delete Product Pix

You can now delete all of the Pictures assigned to Products in your Product Library

All

Product Library Utility - Clean & Delete61 of 61?

Done

All 61 Products

61 Current Products

Clean Groom

Reset Update

Find Change

General Import

User Import

Accounting Import

Distributor Import

Export Products

Clean - Product Make, Model, Desc & Group Fields

This will set remove any blank spaces, carriage returns and quotes from the product Make, Model, SKU, Description, Features and Group fields.

Clean Fields

Groom CAPS in Product Descriptions

This utility will change all Product Descriptions to Title Case and Replace words with CAPS that you specify.

Groom CAPS Descriptions

Groom - Clear Favorite Flags

This utility will clear all of the Fav flags on all of the Products in the Product Library.

Clear All Favorite Flags

Clear A

Clear B

Clear C

Groom Product Makes

This utility will change all Product Makes to Title Case

Groom Makes

Groom - Set all Blank Disciplines to "Equipment"

This will set all Disciplines that are blank to your set Content Subtotal

Set Disciplines

Clean - UnHide "Do not Hide" Products

This utility will UnHide any product that has it's Do Not Hide checkbox checked .

UnHide Products

Delete - All Products in Library

This will permanently delete all of the products in this Product Library.

Delete All Products

Delete - Pictures in Library

This will permanently Delete Pictures on products in this Product Library.

Delete All Product Pix

Delete Hidden Product Pix

Find Products Fav A B C ☐ Show Hidden **Product Pix Utility List** Show Makes ☒ Groups ☒ ? Home

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 Products Hidden 3 of 61 Done

Part Phantom All Supps Show All Products with Pix Clear All Pix on All Products Clear All Pix on All Hidden Prods View Pix Help Guide Download GIMIP App

Bulk PreCut Discontinued

All Product Groups Discontinued Tag All

Dept Cat Type Class Make : Model : Description Finish Fav Hide

Equip Part

Proposal Picture aaaa Part : 1111 : Front Panel

Clear These Pix

Master Prefs: Install Type Default Notice

A pop notice will now appear if you fail to assign a Default Install Type in Master Prefs

Payment Director **Master Prefs - Installation Type** Print ? Home

Install Type Phases Install Type determine which products, labor, parts & wire are directed to what install phases Done

Caution! Make sure to set the Default Install Type to one of the Types in your Portal

Installation Type			Install Phase Director														
Default			Phase 1				Phase 2				Phase 3						
New-3 Phase Pre-Trim-Final 1			Director				Director				Director						
Type	Number of Phases	Description	Equip	Labor	Part	Wire	Phase Label	Equip	Labor	Part	Wire	Phase Label	Equip	Labor	Part	Wire	Phase Label
New	1	Prewire	1	1	1	1	Prewire	2	No	No	No		3	No	No	No	
New	2	Pre-Trim	1	1	1	1	Prewire	2	2	2	2	Trim	3	No	No	No	
New	3	Pre-Trim-Final 1	1	1	1	1	Prewire	2	2	2	2	Trim	3	3	3	3	Final
Retro	1	Pre plus Trim plus Final	1	1	1	1	Pre+Trim+Fin	1	1	1	1		1	1	1	1	
Retro	2	Pre plus Trim-Final	1	1	1	1	Pre+Trim	1	1	1	1	Final	2	No	No	No	
Retro	2	Pre-Trim plus Final	1	1	1	1	Prewire	2	2	2	2	Trim+Final	2	No	No	No	

Screen Optimization: All Database Files

All SCPS database file screens have been optimized so they open and resize themselves properly for full screen and Horizon screen sizes.

Listen Up: Tyler Bookkeeping Product Auto Import Fix & Improve GUI

- Add Next Import display to screen
- Add Global Temp checkbox to screen

Master Prefs - Accounting - Tyler				Export Equivalents	Print	?	Home
Tyler Auto Import Setting	Tyler Value Lists	Current version in use: FileMaker Pro 6.0v4 Dev Import uses FileMaker 6.0 - Auto Import uses Events Plug In		Tyler Product Library	Tyler Product Updater	Done	
Importing Options Last Import: 4/26/2007 6:58:11 AM Next Import Run: Daily at <= 11:10:00 AM Delete - Hide Conditions All Products in the SCPS Product Library, that are not in the Tyler Import, will be Deleted. Unless they are in a Proposal/Project/Completed Project or their Product - Do Not Delete flags is checked. In that case they will simply be Hidden in the SCPS Product Library. All Products in the SCPS Product Library Class, Group and Descriptions will be updated with Tyler Class, Group and Descriptions, unless their Product Specs "Do not Update" flags are checked. Checking these "Do Not Update" boxes overrides the Product Specs "Do not Update" boxes <input type="checkbox"/> Do not Update All Product Class with Tyler Class <input type="checkbox"/> Do not Update All Product Groups with Tyler Department <input type="checkbox"/> Do not Update All Product Descriptions with Tyler Descriptions <input checked="" type="checkbox"/> Do not Delete all ProdUpdater Records after Import Routine (default = unchecked) <input type="checkbox"/> Show "TYL" Header instead of "Inventory Qty" in Product Library				Blank Tyler Items to Fix Copy Text Clear Text This is a Notification that the Tyler Product Import contains records with fields that are Blank. These Products need to be Updated as soon as possible for the next Tyler - SCPS Product Import. - Modify SCPS Equivalent Tables >> Make, Dept, Category, Type, Class, Phase - Modify Tyler >> Description, Status, Unit, Unit Sell, Unit Sell Min, Unit Cost. - 280531 >> Make ID=Make >> Status - AD-POE140 >> Make ID=Make >> Status - BRONZE100-WAL >> Make ID=Make >> Status - BRONZE200-GRY >> Make ID=Make >> Status			
Only Run Auto Import with this User <input checked="" type="radio"/> Jim Engandela <input type="radio"/> Dave Jackson Current User User: Jim Engandela	Tyler or SCPS Import File Path Option <input type="radio"/> SCPS Folder <input checked="" type="radio"/> LU Folder Tyler User Name Listen Up - Tyler	Return to Logo Screen after "Auto Run" Import Routine default = checked <input checked="" type="checkbox"/>	Do not run Auto Import Routine <input type="checkbox"/> Global Temp <input type="checkbox"/> default = uncheck both	Run - Auto Import Tyler >> SCPS	Tyler Blank Product Notification Enable Auto Email <input type="checkbox"/> First Install SMPIT Plug in Email Address Horizon eMail Dave J eMail Darren eMail Email Test		

- Move Filemaker Plug in button to Event Setting screen.
- Add Disable checkbox section
- Add Global Temp checkbox

Accounting - Tyler - Auto Import - Event Setting		?	Home																						
Filemaker Events Plug in	The Events Plug-in is properly installed The Auto Events module can now be configured Done																								
This module automatically imports product data from the Tyler bookkeeping system into SCPS on a regular basis. Please contact Horizon Software to obtain the necessary Events Plug in and setup instructions. There is a nominal charge required for this customization and plug in. It is necessary to click on the enable checkbox to create an event and to click on the Modify before you change any settings. Event runs evt2.autoRCMS.run script. Do not change the script name	<table border="1"> <thead> <tr> <th colspan="2">Tyler Auto Import Product Data - Event Setting</th> </tr> </thead> <tbody> <tr> <td>First Disable Event</td> <td>Success</td> </tr> <tr> <td>Uncheck <input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td colspan="2">Then set the Schedule, Time/Day</td> </tr> <tr> <td>Tyler User: Listen Up - Tyler</td> <td></td> </tr> <tr> <td>Execute: Daily at <time></td> <td></td> </tr> <tr> <td>Military Time: 11 : 10 hh:mm</td> <td>11:10:00 AM</td> </tr> <tr> <td colspan="2">Then Enable this Event below</td> </tr> <tr> <td>Enable Event</td> <td>Success</td> </tr> <tr> <td>Check <input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td colspan="2">script[rcmsprodimp]Prefs.fp5[evt2.autoRCMS.run]D[11]10[0]N/A[1</td> </tr> </tbody> </table> <div> Do not run Auto Import Routine <input type="checkbox"/> Global Temp <input type="checkbox"/> default = uncheck both </div>			Tyler Auto Import Product Data - Event Setting		First Disable Event	Success	Uncheck <input checked="" type="checkbox"/>		Then set the Schedule, Time/Day		Tyler User: Listen Up - Tyler		Execute: Daily at <time>		Military Time: 11 : 10 hh:mm	11:10:00 AM	Then Enable this Event below		Enable Event	Success	Check <input checked="" type="checkbox"/>		script[rcmsprodimp]Prefs.fp5[evt2.autoRCMS.run]D[11]10[0]N/A[1	
Tyler Auto Import Product Data - Event Setting																									
First Disable Event	Success																								
Uncheck <input checked="" type="checkbox"/>																									
Then set the Schedule, Time/Day																									
Tyler User: Listen Up - Tyler																									
Execute: Daily at <time>																									
Military Time: 11 : 10 hh:mm	11:10:00 AM																								
Then Enable this Event below																									
Enable Event	Success																								
Check <input checked="" type="checkbox"/>																									
script[rcmsprodimp]Prefs.fp5[evt2.autoRCMS.run]D[11]10[0]N/A[1																									

All Modules/Home Button: Change "Leave" Button label to "Home" and remove small Home Button

SmartPartner SOFTWARE


High Definition Proposal & Project Management System

Contacts	Master Tracker	Proposals	Product Library	CPS
Info	Project Manager	Projects	Sets Library	Utilities
Forms	Follow Up	Completed	Text Library	Graphics
Preferences	Archive	Point of Sale	Letter Library	User Login

Find Proposals										Fav A B C										Proposals																		Sort	▼	▲	▼	▲	Print	?
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																		
Administrator	Manager	User	Archive	Proposal	8 Proposals	X = User Unlock	= Global Proposal	User: Jim Engandela - 100 - Level: Administrator	Location: 1 - EME Audio & Video Systems	Home	Projects	Completed																																
Dup	Fav	Status	Created	Number	User	View	Client	Company	Proposal Title	Total																																		
3/4/2021	1296.1-1.100	Back, Eileen	Home Entertainment	\$1,397																																								
6/23/2020	1293.1-1.100	Engandela, Jim	Horizon Software	Home Entertainment	\$32,783																																							
4/29/2020	1290.1-1.100	Back, Eileen	Home Entertainment	\$8,624																																								
9/12/2006	1283.1-1.100	Callahan, Hayes	Home Theater System	\$30,647																																								

Proposal List: Expand Proposal Number field

All screens that display the Proposal number now display more digits

Find Proposals	Fav A	B	C	Proposals																		Sort			Print	?	Home	
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		
Administrator	<div> 1413 Proposals X = User Unlock = Global Proposal User: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems</div>																										Add Proposal	Leave
Manager																											Projects	
User																											Completed	
Archive Proposal																												
Dup	Fav	Status	Created	Number	User	View	Client	Company										Proposal Title		Total								
						3/18/2021	13618.1-05.970		Hile, Michael												\$30,993							
						3/18/2021	13617.1-05.970														\$30,993							

Proposal List/Archive: Archive message

Make message clearer on how to Archive a Proposal

Proposals

Find Proposals Fav A B C Sort Print ?

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

Administrator
Manager
User

8 Proposals
X = User Unlock
Archive Proposal = Global Proposal

EME audio & video

User: Jim Engandela - 100 - Level: Administrator
Location: 1 - EME Audio & Video Systems

Add Proposal
Sale Probability
Home
Projects
Completed

Message

Archiving a Proposal moves it to the Archive List
Archived Proposals can be moved back to the Proposal List
Check the Boxes next to the Proposals you want to Archive
Then Click on the Archive Icon below the arrow.

OK

Dup	Fav	Status	Created	Number	User	View	Client	Company	Proposal Title	Total
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/4/20						nt	\$1,397
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6/23/20						nt	\$18,296
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4/29/20						nt	\$8,624
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20						stem	\$30,647
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20							\$30,647
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20						stem	\$24,590
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/12/20						nt	\$69,316
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/11/20						nt	\$57,452

Proposal/Project/Find: Speed up Finding routine

Proposals

Find Proposals Fav A B C Sort Print ? Home

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

Administrator
Manager
User

8 Proposals
X = User Unlock
Archive Proposal = Global Proposal

EME audio & video

User: Jim Engandela - 100 - Level: Administrator
Location: 1 - EME Audio & Video Systems

Add Proposal
Sale Probability
Leave
Projects
Completed

Dup	Fav	Status	Created	Number	User	View	Client	Company	Proposal Title	Total
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/4/2021	1296.1-1.100			Back, Eileen		Home Entertainment	\$1,397
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6/23/2020	1293.1-1.100			Engandela, Jim	Horizon Software	Home Entertainment	\$32,783

Proposal/Print Menu/Cover Page: Remove Blank 2nd page

- Tighten bottom page margin to remove a Blank 2nd page when printing the cover page
- This done for both the Regular and Custom Cover Pages

Pages: 1

EME audio & video

HOME ENTERTAINMENT SYSTEM
Version 1

Project/Print Menu/Projects: Staging Reports Fix

The Staging Reports no longer freeze if there are no Wire Supplements

Printer Setup PDF reDirect Copy

Proposal - Print Menu - Project Shop

CutePDF Writer, winspool, CPW3: **Steve Nelson** Done

COA - Central Vacuum System
6009.2-1.AP Project Approval Wire Manager

Proposals **Projects** **Purchasing** **Costing**

Project Info

- Client/Project Info
- Project Site Directions
- Project Tax Summary
- Product Warranties
- Product Cut Sheets
- Product Specifications
- Product Specifications (By Area)
- Quality Control by Phase
- Product Install Tasks
- Master Product Delivery Form
- Project Purchase Order Summary

Project Progress

Project Staging

Select Phases: ☒ 1 Prewire ☒ 2 Trim ☒ 3 Final

☐ Hide Product Staging Report Pricing

Staging by Make-Model (Total Qty)

Print All Product Staging Part Staging Wire Staging

Staging by Zone-Area (Total Qty)

Print All Product Staging Part Staging Wire Staging

Project Reconciliation

All Project Products with Change Orders

Project Summaries with Change Orders

Sum Mode
Combines like kind items, with Sum Qty

Project Mode
Shows each Project & CO item with CO Number & Unit Qty

Select
Sum or Project Mode then Print

Sum Proj

Project Products
 Project Parts
 Project Wire

Project Summary & Export

Project/Final CO/Print Menu: Enable Hide Prices

You can now choose to the Hide Sell Price on Products in Final Change Orders

Print CO with Separate Products and Product Supplements

Final CO - Print Options - View Print All CO Sections Printer Setup

John & Mary Smith Done

Home Entertainment System
1284.1c2-1.100 Change Order Over Views Fees Other Reports

CO: C2 Home Entertainment System PDF reDirect Pro v2, winspool, Ne01:

Change Order

Pending CO Title
Entering a title will override the default title for this CO and will not affect the Master Project title.

☐ Show Original Area Text in addition to the CO Area Text 3/11/2021 ☐ Report Date - Lock

Areas & Products Report - Formatting

☒ Yes ☐ No Page Break after each Area

☐ Sort Areas = Zone/Location/Placement/Area
Normal Sort = Location/Zone/Placement/Area

☐ Hide Area Text and Show Products

☐ Show Area Text and Hide Products

☐ Hide Products Disciplines

Product Listing

A1 Make-Model-Description-Finish

Areas & Products Pricing

Show Item Prices

☐ Product : Ext Sell
☐ Product/Parts/Wire : Ext Sell
☐ Product + Product Labor : Ext Sell
☐ Product/Parts/Wire + Product/Parts/Wire Labor : Ext Sell
☐ Product : Ext List
☒ Hide Sell Price

Area Totals ☐ Show Area Totals ☒ Hide Area Totals

Final Change Order
1284.1c2-1.100



Home Entertainment System
Change Order
John & Mary Smith

Date
3/12/2021

Zone 1 - Home Theater

Audio	Qty	Ext. Price
Linn : Classik Musio-S : Integrated CD player/tuner/preamp/power amplifier : Silver	1 ea	
Linn : Klimax Chakra 500 Twin-BindPost : Klimax two-channel power amplifier : Silver	1 ea	
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	1 ea	

Products/Parts & Wire Supplements: Change Labor Time Option

You can now change the Parts and Wire Supplement Labor Time from the Product Parts and Wire Supplement screens.

Edit Group Parts		Product Library - Parts Supplements					1 of 61 ? Home							
Class * Product		Klipsch RC-35					Done							
Phase 3 Final		Center Channel Speaker					Prev Next							
Audio : Speaker : Center Channel														
Product	Specs	Pix	PDF	Labor	Parts	Wire	Tasks	Phantom Product ?						
<input type="checkbox"/> Do not use Group Parts		Group Parts					Parts Labor							
Qty	Unit	Make	Model	Description	Phase	Unit Sell	Ext Sell	No. Labor	Unit Time	Extended Ext Time	Ext Sell			
1	ea	Linn	Cirkus Kit	Main bearing upgrade for Sondek	3 Final	\$645.00	\$645.00	<input type="checkbox"/>	0:00:40	0:00:40	\$0.56			
						Total Group Sell		\$645.00						
Manually Assigned Parts							Parts Labor							
Qty	Unit	Make	Model	Description	Phase	Unit Sell	Ext Sell	Del	No. Labor	Unit Time	Extended Ext Time	Ext Sell		
2	ea	Linn	Aktiv Modules	Stereo or twin mono Aktive	3 Final	\$255.00	\$510.00	<input type="checkbox"/>	0:00:15	0:00:30	\$0.42			
						Total Manually Assigned Sell		\$510.00						
Master Prefs - Default Labor Time						Refresh		GP%		Parts Labor		Labor	Labor	
Labor Categories		Hourly Rate		Labor Time (hrs:min:sec)		Parts Grand Total Sell		\$1,155.00		40.0%		Grand Total	0:01:10	\$0.97
4 - Parts Labor		\$50.00		0:15:00 Parts per Each										

Edit Group Wire
Product Library - Wire & Pre-Cut Supplements
1 of 61
? Home

Class Product
Phase 3 Final
Klipsch RC-35
Center Channel Speaker
Audio : Speaker : Center Channel

Done
Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

☐ Do not use Group Wire
Group Wire & Pre-Cut

Class	Run Type	Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Sell	No Labor	Unit Time	Extended Ext Time	Ext Sell
Bulk	Room	75	ft	Linn	K20 Cable	Loudspeaker cable	1	\$2.74	\$205.50	<input type="checkbox"/>	0:00:35	0:43:45	\$43.75

Total Group Price
\$205.50

Manually Assigned Wire & Pre-Cut

Class	Run Type	Room Qty ?	Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Sell	Del	No Labor	Unit Time	Extended Ext Time	Ext Sell
Bulk	Home	<input type="checkbox"/>	150	ft	Monster	16/2 Spkr Wire	2 Conductor	1 Prewire	\$0.45	\$67.50	<input type="checkbox"/>	<input type="checkbox"/>	0:00:45	1:52:30	\$112.50
Pre-Cut		<input type="checkbox"/>	3	pr	Linn	Black Interconnect	Pair of	3 Final	\$120.00	\$360.00	<input type="checkbox"/>	<input type="checkbox"/>	0:06:00	0:18:00	\$18.00

Refresh
Total Manually Assigned Sell
\$427.50

Wire & Pre-Cut Grand Total Sell
\$633.00
GP%
42.9%

Master Prefs - Default Labor Time

Labor Categories	Houly Rate	Labor Time (hrs:min:sec)
5 - Wire Labor - Bulk	\$60.00	0:00:30 Bulk per Foot
6 - Wire Labor - Precut	\$60.00	0:05:00 Precut per Pair

Wire Labor Grand Total
2:54:15
Labor Ext Sell
\$127.50

Product Library - Change Part Labor Time
? Home

Class Part
Phase 3 Final
Linn Aktiv Modules
Stereo or twin mono Aktive crossover upgrade (treble, mid, bass)
Audio : Misc : Final Part

Done

Part Supplemental Labor

Classification Part

Master Prefs Default Unit Labor 0:15:00

Audio : Misc : Final Part
Primary Install Phase: 3 Final

Labor Type	Hourly Labor Rate	Override Labor Time (minutes.seconds)
4 - Parts Labor	\$50.00	0:00:15 hrs:min:sec per each

Phase 1 Prewire
Phase 2 Trim
Phase 3 Final

Total Labor Amount
\$0.21

Product Library/Find Products/Advanced Find: Show Do Not Hide Option

Find Products Show: Makes ☒ Groups ☒ Hidden ☐ **Product Library - Line List** Utilities ? Home

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

A Product Class Hidden Products
 B Part PreCut Discontinued
 C Bulk PreCut Supplements Found 61
 Lab Part Wire Total 61

EME
audio & video

Add Product Detail List Leave
 Inventory Utility Lists Product Sets
 Print Menu

Fav Groups View Sell Price Inv Tag
 Class Discipline Cat Type Supplements Make Model : SKU Description Finish Installed Cue Hide

A	Audio	Speak	Center Channel				Klipsch	RC-35	Center Channel	Black	399.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
A	Audio	Speak	Floor				Klipsch	RF-35 (6483)	Reference	Black	499.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
A	Audio	Speak	Bookshelf				Klipsch	RS-7	Reference	Matte	450.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
A	Audio	Speak	Powered Subwoofer				Klipsch	RSW-10	Reference	Black	1,000.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
A	Audio	Multi	Keypad				Linn	5101 Personal Handset	Universal	Black	600.00 ea	<input type="checkbox"/>	<input type="checkbox"/>

Update Makes & Groups **Product Library - Find Products** Clear All Find Fields Cancel

Choose Advanced Criteria **Enter Full or Partial**
 Make, Model, SKU or Description **Fast Find** **Fast Find** **Fast Find**
 All Products Only Hidden

or

Vendor Install Phase **Pick Criteria**
 Pick Make, Model, SKU or Group **Pick Find** **Pick Find** **Pick Find**
 All Products Only Hidden

Multiple Makes **Pick Make - Model** **Pick Product Group**
 First Pick a Make, then Model or SKU Pick a Discipline, Category, Type or Group

Make Model SKU Discipline Category Type

Product Library - Choose more Criteria Clear All Find Fields Cancel

Enter your find criteria Then click a find button **Find All** **Find Hidden** **Find Regular**

Make
 Model
 SKU
 Description

Features This center channel has been engineered to deliver all the detail, subtleties and dynamics required for the ultimate home theater experience. It delivers detailed, subtle and thrilling sounds through dual 6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The tweeter is coupled to an exclusive Klipsch square Tractrix® Horn that boosts the driver's already high sensitivity, while minimizing room interactions that cause a loss of sonic detail. Contemporary black wood grain vinyl finish.

Unit
 Cost
 Sell
 Minimum Sell

☐ Show without Make or Model
☐ Show without Group
☐ Show without Discipline
☐ Show without Category
☐ Show without Type
☐ Show without Class

☐ Show New Items
☐ Show New RCMS Items
☐ Show Omitted
☐ Show Discontinued Product
☐ Show Fee SKU
☒ Show Do Not Hide

Product Library/Details List: Change Leave to Done button

Find Products										Show Makes <input checked="" type="checkbox"/> Groups <input checked="" type="checkbox"/> Hidden <input type="checkbox"/>										Product Library - Detail List										Utilities		Home																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																									
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Products/AlphaFinder: Redesign AlphaFind screen - Add Features

- Redesign screen for ease of use and added Class column to Group Portal.
- Update Makes utility is now in the upper left corner. Moved the Change Make Name Utility to the Utility screen
- Clicking anywhere on a Group will find all of the Products in that Group.

Update Makes		Show Hidden <input type="checkbox"/>		Product Library - AlphaFind by Make = L																		Show Groups <input checked="" type="checkbox"/>		Cancel																																																					
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																											
<div><div></div><div>Pick All</div><div>Linn</div></div>										<div><div></div><div>Pick a Group of Products</div><div>Linn</div></div> <div></div>																																																																			
Pick Make										<table><thead><tr><th>Discipline</th><th>Category</th><th>Type</th><th>Class</th></tr></thead><tbody><tr><td>Audio</td><td>Amplifier</td><td>Multi-channel</td><td>Product</td></tr><tr><td>Audio</td><td>Amplifier</td><td>Preamplifier</td><td>Product</td></tr><tr><td>Audio</td><td>Amplifier</td><td>Stereo</td><td>Product</td></tr><tr><td>Audio</td><td>Amplifier</td><td>Surround Processor</td><td>Product</td></tr><tr><td>Audio</td><td>Amplifier</td><td>Surround Receiver</td><td>Product</td></tr><tr><td>Audio</td><td>Control</td><td>Multi-channel</td><td>Product</td></tr><tr><td>Audio</td><td>Misc</td><td>Final Part</td><td>Part</td></tr><tr><td>Audio</td><td>Misc</td><td>Trim Part</td><td>Part</td></tr><tr><td>Audio</td><td>Multi-room</td><td>Controller</td><td>Product</td></tr></tbody></table>																												Discipline	Category	Type	Class	Audio	Amplifier	Multi-channel	Product	Audio	Amplifier	Preamplifier	Product	Audio	Amplifier	Stereo	Product	Audio	Amplifier	Surround Processor	Product	Audio	Amplifier	Surround Receiver	Product	Audio	Control	Multi-channel	Product	Audio	Misc	Final Part	Part	Audio	Misc	Trim Part	Part	Audio	Multi-room	Controller	Product
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<div><div></div><div>Linn</div></div>																																																																													

An AlphaFind button has been added to all Product List screens. This button will return you to the AlphaFind screen with the previously selected Make/Groups

Find Products		Show: Makes <input checked="" type="checkbox"/> Groups <input checked="" type="checkbox"/> Hidden <input type="checkbox"/>		Product Library - Line List															AlphaFind		Utilities		Home																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																														
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An AlphaFind button has been added to the Product Detail screen. This button enables you select Makes/Groups and return to this screen

Find Products

Replace Data

Product Library - Product Detail

1 of 1

AlphaFind

Home

Update Supplements

Delete Product

Created: 1/8/2002

Sell Updated: 6/2/2011

Cost Updated: 6/2/2011

Linn

Katan

Bookshelf loudspeakers: pair

Audio : Speaker : Bookshelf

Add Product

Duplicate Product

Done

Prev

Next

Product

Specs

Pix

PDF

Labor

Parts

Wire

Tasks

Make

Model

SKU

Finish

Description

Features

Cue Notes

Linn

Katan

Black

Bookshelf loudspeakers: pair

The Katan loudspeaker is an attractive, compact, two-way bass reflex loudspeaker designed for multi-channel applications.

Unit Sell

Installed Sell

\$995.00 pr

\$1,258.00 pr

Group

Audio : Speaker : Bookshelf

Class

Product

Phase

3 Final

Product Status

Phantom Product

QB Fee SKU

Favorite

New Item

Discontinued Item

Hide this Item

Do not Hide

Do not Delete

This Product is In a Proposal/Project/Change Order

Proposal Options

Area Sort Order

Product Tax Override

Tax A

Tax B

Tax C

Labor Tax Override

Do not Discount

Hide Printed Price

Exclude Product Price




















Zero All Supplement \$

Do not Purchase or Install

Issue Install Staple Up Card

Listen Up: Tyler: Increase Column Widths and Screen Optimization to accommodate more text

Done

Labor	Parts	Wire	Master Project						
Pick Area	Location	Zone	Areas	Add Products & Supplements to Area	Status	Change Qty + -	Qty	Zone 1 - Home Theater	Unit Sell Ext Sell
								Make : Model	Finish
	1	Home Theater					1 ea	Linn : 5125	\$2,750.00
	2	Living Room			Audio		Silver	Five channel power amplifier (Black)	\$2,750.00
	3	Office			Amplifier : Multi-channel			Shop Notes	
	4	Dining Room			A		1 ea	Linn : Classik Music-S	\$1,550.00
	4	Kitchen			Audio		Silver	Integrated CD	\$1,550.00
	5	Master Bedroom			Source : CD Player			Shop Notes	
	5	Master Bathroom					5 pr	Linn : Katan	\$995.00
					Audio		Black	Bookshelf loudpeakers: pair	\$4,975.00
					Speaker : Bookshelf			Shop Notes	
					A		1 ea	Linn : Klimax Chakra 500	\$7,995.00
					Audio		Silver	Klimax two-channel power amplifier	\$7,995.00
					Amplifier : Stereo			Shop Notes	
							1 ea	Linn : Melodik	\$4,950.00
					Audio		Black	Aktive isobarik bass extension	\$4,950.00
					Speaker : Powered Subwoofe			Shop Notes	

Grand Total

John & Mary Smith

Home Entertainment System
1284.1c1-1.100

Zone 2 - Living Room Total: \$11,575.00

Areas	Text	Products
Labor	Parts	Wire
Tasks		

John & Mary Smith

Home Entertainment System

1284.1c1-1.100

Equipment	\$10,900.00
Installation	\$390.00
Misc. Parts	\$285.00
Wire & Cable	
Zone 2 - Living Room Total:	\$11,575.00

Loc
Zone

Areas
Pick or Type Area

Max 40 Characters

Add Area
No Product Prompt ☐

Location	Zone	Sort	Pick Area	Rename	Dup	Del
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="m"/>	Balcony			
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="m"/>	Bathroom 5			
<input type="text"/>	<input type="text" value="2"/>	<input type="text" value="m"/>	Living Room			
<input type="text"/>	<input type="text" value="3"/>	<input type="text" value="m"/>	Office			
<input type="text"/>	<input type="text" value="4"/>	<input type="text" value="m"/>	Dining Room			

Zone 2 - Living Room

Products
 Sets
 Supplements

Discipline	Cat	Type	Status	Sort	View	Qty	Make	Model	Unit Sell	Tag-Del
Audio	A	<input type="text" value="m"/>				1	Klipsch	RSW-10	\$1,000.00	<input type="checkbox"/>
Speaker :	Black Ash		ea	Reference Subwoofer					\$1,000.00	
CO Notes						Shop Notes				
Audio	A	<input type="text" value="m"/>				2	Linn	Melodik	\$4,950.00	<input type="checkbox"/>
Speaker :	Black		ea	Aktive isobarik bass extension					\$9,900.00	
CO Notes						Shop Notes				

Pending Change Order - Select CO Quantity

John & Mary Smith

1 - Home Theater

Linn : Classik Music-S

Audio : Source : CD Player

Continue 

Master Project - Product

Make

Model

SKU

Finish

Description

Project
Product Qty

1

Project
Product Sell

\$1,550.00

Net Product Qty

2

Pending Change Order - Product

Change Order Conditions

Quantity cannot be Empty or 0

Negative Qty items cannot be greater than the Original Qty.

Negative Qty items Price must be the same as the Original Sell Price.

Add or Subtract
a Quantity

1

Change Order
Product Sell Price

\$1,550.00

Change Order Notes
for this Product

Project/Pending CO/Areas: Improve GUI

Clear All Area Text 1		Pending CO - Area Text for John & Mary Smith Home Entertainment System 1284.1c1-1.100		Client Mode <input type="checkbox"/> ? Home
<div style="display: flex; justify-content: space-between;"> <div> Areas Labor </div> <div> Text Parts </div> <div> Products Wire </div> <div> Tasks Tasks </div> </div>		Done		
1 - Pick Area Zone 1 - Home Theater		2 - Pick Text Category		3 - Pick Text Control
Atrium Balcony Bathroom 5 Bathroom 2 Bedroom 4 Bedroom 5 Zone 1 - Home Theater Zone 2 - Living Room Zone 3 - Office Zone 4 - Dining Room		Audio Commercial Sound Control Installations Jacks Racks Rooms Security Systems Vacuum Video		Auto a/b switch IR remote control Keypad control Manual a/b switch Volume control
Area Products <i>White fields = Editable WO Product Install Notes</i> <i>Gray fields = Permanent Product Install Notes</i>		<div style="display: flex; justify-content: space-between; align-items: center;"> <div> Proposal - Area Text for: Zone 1 - Home Theater </div> <div> Add to Library ? </div> </div>		
Linn : Classik Music-S A		A wall mounted keypad will control the selection of source music from the main components and most functions such as play, stop and track selection.		

Proposal/ Product/Detail: Add Area Button

To return to the Areas & Products screen

Delete Product Client Mode ☐ **Proposal - Product Detail** Reset Labor 3 of 28 ? Home

Thomas Dow Chippewa Valley Eye Clinic
1273.1-1.100

Linn : Melodik
Audio : Speaker : Powered Subwoofer

Areas Text Products Labor Parts Wire Tasks

Product Specs Pix - PDF's Labor Parts Wire Tasks **1 - Home Theater**

Qty 1
Make Linn Sell Price
Model Melodik \$4,504.50 ea
SKU
Finish Black Like Kind Modifier ?
Description Active isobarik bass extension loudspeaker
Proposal

Group Audio : Speaker : Powered Subwoofer
Change Group Original Group Audio
Product Classification Product
Primary Install Phase 3 Final
Tax A T Tax B T Tax C Labor Tax Override ?

Proposal/Print Menu/Custom Reports: Delete Report Records

Delete Report file records when leaving the Reports file so they don't build up.

Project CO: Payment option with negative CO Amount

When clicking on the OK-Cancel button you are now returned to the Change Order instead of the Fast Open screen.

Discipline	Area	Phase	Final CO - Detail by Area		Utilities	Home
Client	Areas	CO Fees	John & Mary Smith		Pricing	Invoicing
Project	Info	Products	Home Entertainment System		Payments	Purchasing
Contacts	Log	Supplements	1284.1c3-1.100		Install Notes	Work Orders
Client Mode <input type="checkbox"/>	Super Views	QVE QVC QVP	Status: Review	Final CO	Wire Manager	Change Orders
Discipline : Category : Type	CO#3	Qty Make : Model	Finish	Description	Grand Total	
Home Entertainment System Change Order 1284.1c3-1.100						
Zone 4 - Dining Room						-\$1,305.00
Autom : Contr : Keypad	D c3	-1 ea Linn : Knekt RCU	White	Knekt room control unit		-750.00

Message X

This Change Order has a Negative Total.
Payments made to Change Orders with Negative Totals should be made in the Master Project Payment screen.

CO Payments OK-Cancel

Project/Final CO/Print Menu/Reports: Fix Other Reports Subtotals

Print CO with Separate Products and Product Supplements			Final CO - Print Options - View		Print All CO Sections		Printer Setup
			John & Mary Smith				Done
By Discipline	By Area	By Phase	Home Entertainment System 1284.1c2-1.100		Change Order	Over Views	Fees
CO Purchase Order			CO: C2 Home Entertainment System		PDF reDirect Pro v2 spool,Ne01:		
Change Order				Product Listing			
Pending CO Title Entering a title will override the default title for this CO and will not affect the Master Project title				A1 Make-Model-Description-Finish			

Final CO Other Reports - Print/Preview and stay in CO

You now stay in the correct Final Change Order after printing or previewing Other Reports.

Print CO with Separate Products and Product Supplements			Final CO - Print Options - View		Print All CO Sections		Printer Setup
			John & Mary Smith				Done
By Discipline	By Area	By Phase	Home Entertainment System 1284.1c2-1.100		Change Order	Over Views	Fees
CO Purchase Order			CO: C2 Home Entertainment System		PDF reDirect Pro v2 spool,Ne01:		
Change Order				Product Listing			
Pending CO Title Entering a title will override the default title for this CO and will not affect the Master Project title				A1 Make-Model-Description-Finish			

Current SCPS 14.8v1 Features & Enhancement Details

Proposal/Project List: Faster Sort entering the Proposal and Project List screens



SmartPartner SOFTWARE

High Definition Proposal & Project Management System

Contacts	Master Tracker	Proposals	Product Library	CPS
Info	Project Manager	Projects	Sets Library	Utilities
Forms	Follow Up	Completed	Text Library	Graphics
Preferences	Archive	Point of Sale	Letter Library	User Login

Master Prefs - Other - Proposals 1							?	Home
Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters	FileMaker	Done	
Proposal 2	Project CO	Products 2	Misc 2	3rd Party 2	Graphics	Networking		

Entering Proposal/Project/Completed/Archive Lists

No Proposal "New or View" Prompt ☒

Sort Proposals & Projects ☒

Sort Option (Slower) ☐ Descending Order Descending = Highest to Lowest number
Ascending = Lowest to Highest number

Find Proposals		Fav A B C		Proposals																		Sort		▼ ▲ ▴ ▾			Print		?		Home	
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														
Administrator		<div>EME audio & video</div> <div>7 Proposals</div> <div>X = User Unlock</div> <div>= Global Proposal</div> <div>User: Jim Engandela - 100 - Level: Administrator</div> <div>Location: 1 - EME Audio & Video Systems</div>																		Add Proposal		Leave										
Manager																				Projects												
User																				Completed												
Archive Proposal																																
Dup		Fav		Status		Created		Number		User		View		Client		Company		Proposal Title		Total												
●		□		□		□		R		6/23/2020		1293.1-1.100		🔍		Engandela, Jim		Horizon Software		Home Entertainment \$32,783												
●		□		□		□		□		4/29/2020		1290.1-1.100		🔍		Back, Eileen				Home Entertainment \$8,624												
●		□		□		□		□		9/12/2006		1283.1-1.100		🔍		Callahan, Hayes				Home Theater System \$30,647												
●		□		□		□		R		9/12/2006		1276.1-1.100		🔍		Jameson, John				Video System \$30,647												
●		□		□		□		S		9/12/2006		1274.1-1.100		🔍		Burke, Tom		Sunbelt Business Brokers		Home Theater System \$24,590												
●		□		□		□		□		9/12/2006		1273.1-1.100		🔍		Hawn, Dr.		Chippewa Valley Eye Clinic		Home Entertainment \$65,666												
●		□		□		□		A		9/11/2006		1267.1-1.100		🔍		Engandela, Jim		Horizon Software		Home Entertainment \$57,452												

Proposal: Area button: Add Freeze to stabilize routine entering the Areas module

Discipline		Area		Phase		Proposal - Detail by Area				Utilities				Home			
Client		Areas		Fees		Jim Engandela Horizon Software Home Entertainment System 1293.1-1.100				Pricing		Invoicing		Leave			
Project	Info	Products		Area Text						Payments		Purchasing		Tracker			
Contacts	Log	Supplements		Overviews						Install Notes		Work Orders		Print Menu			
Client Mode <input type="checkbox"/>		Super Views		QCE	QVC	QVP	Status: Review		Convert to Project		Wire Manager		Change Orders		Labor Total		
Discipline : Category : Type						Qty	Make : Model				Finish	Description				Grand Total	
Home Entertainment System																	
Bungalow														\$15,394.95			
Audio : Speak : Powered Su				2 ea	Klipsch : RSW-10				Black	Reference Subwoofer				2,000.00			
Audio : Multi : Keypad				1 ea	Linn : 5101 Personal Handset				Black	Universal learning remote				600.00			

Proposal/Project/CO: Status Flag Display

Status Flag Display now shows both the Favorite Status and the Proposal/Project/CO Status

Discipline		Area		Phase		Proposal - Detail by Area				Utilities				Home			
Client		Areas		Fees		 John Jameson Video System 1276.1-1.100				Pricing		Invoicing		Leave			
Project	Info	Products		Area Text						Payments		Purchasing		Tracker			
Contacts	Log	Supplements		Overviews						Install Notes		Work Orders		Print Menu			
Client Mode <input type="checkbox"/>		Super Views		QCE	QVC	QVP	Status: C Progress		Convert to Project		Wire Manager		Change Orders		Labor Total		
Discipline : Category : Type						Qty	Make : Model				Finish	Description				Grand Total	
Video System																	
Zone 1 - Home Theater															\$27,146.98		
Audio : Ampli : Multi-chan				1 ea	Linn : 5125				Silver	Five channel power amplifier				2,750.00			
Audio : Speak : Bookshelf				5 pr	Linn : Katan				Black	Bookshelf loudspeakers: pair				4,975.00			
Audio : Speak : Powered Su				1 ea	Linn : Melodik				Black	Aktive isobarik bass extension				4,950.00			

Master Project - Status	
John & Mary Smith Done	
Home Entertainment System 1284.1-1.100	
<div>Project Fav</div> <div>Clear Favorite Flag</div> <div>A</div>	<div>Project Status</div> <div>Clear Project Status</div> <div> <input type="radio"/> PE Pending <input type="radio"/> OR Ordered <input type="radio"/> PO Partial Ordered <input type="radio"/> ST Staged <input type="radio"/> DL Delivered <input checked="" type="radio"/> PD Partial Delivered </div>

Proposal: GUI Quick View Buttons

Move Quick View and Client Mode buttons

QVP = Quick View Products = View All SCPS Products

Proposal/Area: Refresh screen after deleting an area

Project/Print Menu/Project: Staging Doc: Add Phantom Product label, Cost and expand Make-Model-Finish and Description to hold more text

EME Audio & Video Systems - Confidential Report

Staging Document - Products

Jim Engandela Horizon Software

Home Entertainment System

1293.1-1.100

2/1/2021

Page 1

Total Qty
Sorted by Make-Model

Make-Model-Finish

SKU

Description

Unit Cost-Unit Sell

Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell	Ck	InStock	OnOrder	Date	Initial
3 Final	3 ea	AKG : 1	Order	<input type="checkbox"/>			
Phantom Product		\$101.46 \$178.00	Re'vd	<input type="checkbox"/>			
			Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
			#				
3 Final	4 ea	Klipsch : RSW-10 : Black Ash	Order	<input type="checkbox"/>			
		Reference Subwoofer	Re'vd	<input type="checkbox"/>			
		\$525.00 \$1,000.00	Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
			#				
2 Trim	2 ea	Linn : 5101 Personal Handset : Black	Order	<input type="checkbox"/>			
		Universal learning remote	Re'vd	<input type="checkbox"/>			
		\$234.00 \$800.00	Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
			#				
3 Final	2 ea	Runco : CL-810	Order	<input type="checkbox"/>			
		DLP Projector	Re'vd	<input type="checkbox"/>			
		\$4,797.00 \$7,995.00	Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
			#				

Project/Print Menu/Project: Export Project

Add Phantom column to export data and populate Unit Cost, Unit Sell and Ext Sell for Phantom Products

Company	Project Number	Classification	Phantom Product	Qty	Unit	Make	Model	Description	Unit Cost	Unit Sell	Extended Sell
Horizon Software	1293.1-1.100	Product	Phan	1 ea		AKG	1		\$101.46	\$178.00	\$178.00
Horizon Software	1293.1-1.100	Product	Phan	2 ea		AKG	1		\$101.46	\$178.00	\$356.00
		Part		2 ea		Blusound	BP100-BLA	Pulseflex battery			\$0.00
		Part		4 ea		Blusound	BP100-BLA	Pulseflex battery			\$0.00
		Pre-Cut Wire &		1 ea		Ace Backstage	C-15103	XLR(M)	\$3.51	\$8.00	\$8.00

Project/Utility/Export: Export Bill of Materials with Phantom Price

- Export this Project as a dbf File
- This utility will export All Products, Wire, Parts and Labor in this Project
- You will be able to open the Exported file with Excel.

- You will have the Option to Remove Parts, Wire or Labor before you Export

Export includes these Product Fields

QTY - UNIT - MAKE - MODEL - QB_SKU - DESCRIPTION - FINISH

DISCIPLINE - CATEGORY - TYPE - CLASS - PHASE

UNIT_COST - UNIT_SELL - Ext_SELL - UNIT_LABOR - TAX



- You can Remove Parts, Wires, Labor and Phantom Parts with the Delete Icons before you Export your Project if you wish.

Project Utility - Export SCPS Project to Excel										Project Utility - Export SCPS Project to Excel										Project Utility - Export SCPS Project to Excel									
Export to Excel		Clear All Parts		Jim Engandela - Horizon Software		Clear Phantom Products		Export to Excel		Jim Engandela - Horizon Software		Export to Excel		Jim Engandela - Horizon Software															
Done - Cancel		Clear All Wire		1293.1-1.100		Done - Cancel		Done - Cancel		1293.1-1.100		Done - Cancel		1293.1-1.100															
Delete		Clear All Labor																											
Project Number	Client	Company	Classification	Phantom Product	Qty	Unit	Make	Model	SKU	Description	Unit Cost	Unit Sell	Extended Sell	Tax															
1293.1-1.100	Engandela, Jim	Horizon Software	Product	Phantom	1	ea	aaaaPosting Test	1111																					
1293.1-1.100	Engandela, Jim	Horizon Software	Product	Phantom	1	ea	aaaaPosting Test	1111																					
1293.1-1.100	Engandela, Jim	Horizon Software	Product		2	ea	Klipsch	RSW-10		Reference Subwoofer	\$525.00	\$1,000.00	\$2,000.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Product		2	ea	Klipsch	RSW-10		Reference Subwoofer	\$525.00	\$1,000.00	\$2,000.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Product		1	ea	Linn	5101 Personal Handset		Universal learning	\$234.00	\$600.00	\$600.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Product		1	ea	Linn	5101 Personal Handset		Universal learning	\$234.00	\$600.00	\$600.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Product		1	ea	Runco	CL-610		DLP Projector	\$4,797.00	\$7,995.00	\$7,995.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Product		1	ea	Runco	CL-610		DLP Projector	\$4,797.00	\$7,995.00	\$7,995.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		1	ea	aaaa Part	1111			\$50.00	\$100.00	\$100.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		1	ea	aaaa Part	1111			\$50.00	\$100.00	\$100.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		1	ea	Linn	Cirkus Kit		Main bearing upgrade for	\$387.00	\$645.00	\$645.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		1	ea	Linn	Cirkus Kit		Main bearing upgrade for	\$387.00	\$645.00	\$645.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		2	ea	Linn	Knekt RCU Install Kit		Install kit (contents	\$125.00	\$210.00	\$420.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		2	ea	Linn	Knekt RCU Install Kit		Install kit (contents	\$125.00	\$210.00	\$420.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		1	ea	Linn	Knekt RCU Metalwork	Knekt	Back box	\$12.00	\$20.00	\$20.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		1	ea	Linn	Knekt RCU Metalwork	Knekt	Back box	\$12.00	\$20.00	\$20.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		2	ea	Linn	Phono Plugs-Standard		Pack 6 red/6 black	\$57.00	\$95.00	\$190.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Part		2	ea	Linn	Phono Plugs-Standard		Pack 6 red/6 black	\$57.00	\$95.00	\$190.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Pre-Cut Wire &		1	ea	aaaa wire no labor	2222			\$50.00	\$100.00	\$100.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Pre-Cut Wire &		3	pr	Linn	Black Interconnect		Pair of phono-phono	\$72.00	\$120.00	\$360.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Pre-Cut Wire &		1	ea	Monster	HDMI400-1M	123128	1m HDMI400 Super-High	\$59.97	\$99.95	\$99.95	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Bulk Wire & Cable		150	ft	Linn	Bulk Analog interconnect		Analog interconnect	\$2.55	\$4.25	\$637.50	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Bulk Wire & Cable		150	m	Linn	K10 Cable		Loudspeaker cable	\$3.00	\$5.00	\$750.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Bulk Wire & Cable		150	ft	Monster	16/2 Spkr Wire		2 Conductor Speaker	\$0.15	\$0.45	\$67.50	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Bulk Wire & Cable		150	ft	Monster	16/2 Spkr Wire		2 Conductor Speaker	\$0.15	\$0.45	\$67.50	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Bulk Wire & Cable		75	ft	Monster	MVQUAD-B DB EZ500	100739	RG6 Direct Burial	\$0.60	\$1.80	\$135.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		0:30:00	FLA	CUSLAB	CUSTOM INSTALL			\$30.00	\$30.00	\$30.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		1:00:00	FLA	CUSLAB	CUSTOM INSTALL			\$80.00	\$80.00	\$80.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		6:00:00	FLA	CUSLAB	CUSTOM INSTALL			\$600.00	\$600.00	\$600.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		1:00:00	FLA	CUSLAB	CUSTOM INSTALL			\$50.00	\$50.00	\$50.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		4:22:30	FLA	CUSLAB	CUSTOM INSTALL			\$262.50	\$262.50	\$262.50	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		0:15:00	FLA	CUSLAB	CUSTOM INSTALL			\$15.00	\$15.00	\$15.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		1:00:00	FLA	CUSLAB	CUSTOM INSTALL			\$60.00	\$60.00	\$60.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		1:00:00	FLA	CUSLAB	CUSTOM INSTALL			\$100.00	\$100.00	\$100.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		0:30:00	FLA	CUSLAB	CUSTOM INSTALL			\$25.00	\$25.00	\$25.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		1:15:00	FLA	CUSLAB	CUSTOM INSTALL			\$75.00	\$75.00	\$75.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		0:30:00	FLA	CUSLAB	CUSTOM INSTALL			\$30.00	\$30.00	\$30.00	T															
1293.1-1.100	Engandela, Jim	Horizon Software	Labor		0:45:00	FLA	CUSLAB	CUSTOM INSTALL			\$75.00	\$75.00	\$75.00	T															

- Exported File can be opened in Excel
- Phantom Product Cost, Sell, Ext Sell = 0
- Parts that make up Phantom Products now have Cost, Sell & Ext Sell Prices

ZI_COMPANY	ZI_PROJNUM	ZI_ZR_CLASS	PD_PHANTOM	PD_QTY	PD_ZR_MAKE	PD_MODEL_L	PD_SKU	PD_DESCRIP	PD_UNIT_CO	PD_UNIT_SE	ZR_SELLEXT	ZR
Horizon Software	1293.1-1.100	Product	Phantom Product	1	ea	aaaaPosting Test	1111		0.00	0.00	0.00	T
Horizon Software	1293.1-1.100	Product	Phantom Product	1	ea	aaaaPosting Test	1111		0.00	0.00	0.00	T
Horizon Software	1293.1-1.100	Product		2	EA	Klipsch	RSW-10	Reference Subwoofer	525.00	1000.00	2000.00	T
Horizon Software	1293.1-1.100	Product		2	EA	Klipsch	RSW-10	Reference Subwoofer	525.00	1000.00	2000.00	T
Horizon Software	1293.1-1.100	Product		1	ea	Linn	5101 Personal Handset	Universal learning remote	234.00	600.00	600.00	T
Horizon Software	1293.1-1.100	Product		1	ea	Linn	5101 Personal Handset	Universal learning remote	234.00	600.00	600.00	T
Horizon Software	1293.1-1.100	Product		1	ea	Runco	CL-610	DLP Projector	4797.00	7995.00	7995.00	T
Horizon Software	1293.1-1.100	Product		1	ea	Runco	CL-610	DLP Projector	4797.00	7995.00	7995.00	T
Horizon Software	1293.1-1.100	Part		1	ea	aaaa Part	1111		50.00	100.00	100.00	T
Horizon Software	1293.1-1.100	Part		1	ea	aaaa Part	1111		50.00	100.00	100.00	T
Horizon Software	1293.1-1.100	Part		1	ea	Linn	Cirkus Kit	Main bearing upgrade for Sondek LP1	387.00	645.00	645.00	T
Horizon Software	1293.1-1.100	Part		1	ea	Linn	Cirkus Kit	Main bearing upgrade for Sondek LP1	387.00	645.00	645.00	T
Horizon Software	1293.1-1.100	Part		2	ea	Linn	Knekt RCU Install Kit	Install kit (contents listed below)	125.00	210.00	420.00	T
Horizon Software	1293.1-1.100	Part		2	ea	Linn	Knekt RCU Install Kit	Install kit (contents listed below)	125.00	210.00	420.00	T
Horizon Software	1293.1-1.100	Part		1	ea	Linn	Knekt RCU Metalwork	Knekt Back box	12.00	20.00	20.00	T
Horizon Software	1293.1-1.100	Part		1	ea	Linn	Knekt RCU Metalwork	Knekt Back box	12.00	20.00	20.00	T
Horizon Software	1293.1-1.100	Part		2	ea	Linn	Phono Plugs-Standard	Pack 6 red/6 black standard phono plugs	57.00	95.00	190.00	T
Horizon Software	1293.1-1.100	Part		2	ea	Linn	Phono Plugs-Standard	Pack 6 red/6 black standard phono plugs	57.00	95.00	190.00	T
Horizon Software	1293.1-1.100	Pre-Cut Wire & Cable		1	ea	aaaa wire no labor	2222		50.00	100.00	100.00	T
Horizon Software	1293.1-1.100	Pre-Cut Wire & Cable		3	pr	Linn	Black Interconnect	Pair of phono-phono leads (Black cable)	72.00	120.00	360.00	T
Horizon Software	1293.1-1.100	Pre-Cut Wire & Cable		1	ea	Monster	HDMI400-1M	1m HDMI400 Super-High Performance	59.97	99.95	99.95	T
Horizon Software	1293.1-1.100	Bulk Wire & Cable		150	ft	Linn	Bulk Analog interconnect	Analog interconnect	2.55	4.25	637.50	T
Horizon Software	1293.1-1.100	Bulk Wire & Cable		150	M	Linn	K10 Cable	Loudspeaker cable	3.00	5.00	750.00	T
Horizon Software	1293.1-1.100	Bulk Wire & Cable		150	ft	Monster	16/2 Spkr Wire	2 Conductor Speaker Wire	0.15	0.45	67.50	T
Horizon Software	1293.1-1.100	Bulk Wire & Cable		150	ft	Monster	16/2 Spkr Wire	2 Conductor Speaker Wire	0.15	0.45	67.50	T
Horizon Software	1293.1-1.100	Bulk Wire & Cable		75	ft	Monster	MVQUAD-B DB EZ500	RG6 Direct Burial MV-Quad Video Cat	0.60	1.80	135.00	T
Horizon Software	1293.1-1.100	Labor		0:30:00	FLA	CUSLAB		CUSTOM INSTALL	0.00	30.00	30.00	T
Horizon Software	1293.1-1.100	Labor		1:00:00	FLA	CUSLAB		CUSTOM INSTALL	0.00	80.00	80.00	T

Printer Setup			PDF reDirect			Copy			Project - Print Menu - Project Shop																										
PDF reDirect Pro v2,winspool,Ne01:						Jim Engandela						Done																							
						Horizon Software																													
						Home Entertainment System						Project Approval																							
						1293.1-1.100						Wire Manager																							
Proposals		Projects		Purchasing		Costing																													
Project Info												Project Staging												Project Reconciliation											
Client/Project Info												<div>Select Phases<div><input checked="" type="checkbox"/> 1 Prewire</div><div><input checked="" type="checkbox"/> 2 Trim</div><div><input checked="" type="checkbox"/> 3 Final</div></div> <div><input type="checkbox"/> Hide Product Staging Report Pricing</div>												All Project Products with Change Orders											
Project Site Directions												Staging by Make-Model (Total Qty)												Project Summaries with Change Orders											
Project Tax Summary												Print All Product Staging												Sum Mode											
Product Warranties												Part Staging												Combines like kind items, with Sum Qty											
Product Cut Sheets												Wire Staging												Project Mode											
Product Specifications												Staging by Zone-Area (Total Qty)												Shows each Project & CO item with CO Number & Unit Qty											
Product Specifications (By Area)												Print All Product Staging												Select											
Quality Control by Phase												Part Staging												Sum or Project Mode then Print											
Product Install Tasks												Wire Staging												<div>Sum Proj</div>											
Master Product Delivery Form												Staging by Discipline (Total Qty)												Project Products											
Project Purchase Order Summary												Print All Product Staging												Project Parts											
												Part Staging												Project Wire											
Project Progress												Wire Staging												Project Summary & Export											
<i>Net Qty with Change Orders</i>												Items must have Phase Number/Names												Product Sum List											
Product Staging - Bill of Materials												Export Product Staging Items												Qty Sum of Project Items and CO's											
BOM - Installation Items												Export Project Product & Supplements												Parts Sum List											
Installed vs Remaining to Install Products Only																								Qty Sum of Project Items and CO's											
BOM - Installation Items																								Wire Sum List											
Installed vs Remaining to Install Products Only - with Area Text																								Qty Sum of Project Items and CO's											
BOM - Installation Items																								All Sum List											
Installed vs Remaining to Install Products & Supplements																								Qty Sum of Project Items and CO's											

EME Audio & Video Systems - Confidential Report

2/14/2021

Staging Document - Parts

Page 1

Total Qty
Sorted by Make-Model

Jim Engandela Horizon Software
Home Entertainment System
1293.1-1.100

Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost	Unit Sell		Ck	InStock	OnOrder	Date	Initial
3 Final Part	2 ea	aaaa Part : 1111 : \$50.00	\$100.00	Order Rc'vd Rc'vd Stock Delivered #	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
2 Trim Part	2 ea	Linn : Cirkus Kit : Main bearing upgrade for Sondek LP12 \$387.00	\$645.00	Order Rc'vd Rc'vd Stock Delivered #	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
3 Final Part	4 ea	Linn : Knekt RCU Install Kit : Install kit (contents listed below) \$125.00	\$210.00	Order Rc'vd Rc'vd Stock Delivered #	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
2 Trim Part	2 ea	Linn : Knekt RCU Metalwork : Knekt Back box \$12.00	\$20.00	Order Rc'vd Rc'vd Stock Delivered #	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
3 Final Part	4 ea	Linn : Phono Plugs-Standard : Pack 6 red/6 black standard phono plugs \$57.00	\$95.00	Order Rc'vd Rc'vd Stock Delivered #	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Project/Payments: Allow Payment Terms Changes

Allow Payment Method, Percentages, Manual Amount Changes in a Project or Final Change Order without going into the Edit Mode.

You cannot however change the Installation Type.

Clear All Manual Payments

1

Project - Payment Terms

?

Jim Engandela

Horizon Software

Home Entertainment System

1293.1-1.100

Done with Update

Installation Type

New-3 Phase Pre-Trim-Final

Installation Type

New-3 Phase Pre-Trim-Final

Payment Method

Percentage

Update

Click Reset Payments after changing Payment Method

Payment Labels

Payment Description

Percentage Total: 100%

Total Payments: \$32,783.33

Payment Steps

Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback
Deposit	Payment 1	Payment 2	Payment 3	Hold Back
Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation prewire phase.	Due at the completion of the installation.
10 %	30 %	20 %	30 %	10 %
Amount \$3,278.33	Amount \$9,835.00	Amount \$6,556.67	Amount \$9,835.00	Amount \$3,278.33

Phase 1 Total \$

Phase 2 Total \$

Phase 3 Total \$

Payment Step Director

	Step 1	Step 2	Step 3
Payment Director	1	2	3
Products	1	2	3
Labor	1	2	3
Parts	1	2	3
Wire	1	2	3
Fees	1	2	3

Warning:

The Proposal Total and the Payment Total must be equal to each other!

If Rounding .01 Off:

Check Master Prefs Install Types and Global Proposal Price Adjuster

Try adding .005 to a Payment

Click Reset Payments after changing Payment Amounts

Totals Update Payments

Proposal	\$32,783.34
- Payments	\$32,783.33
Difference Must = \$0	\$0.01

You cannot however change the Installation Type

Clear All Manual Payments 1 J **Project - Payment Terms** ?

Jim Engandela
Horizon Software
Home Entertainment System
1293.1-1.100

Done with Update

Installation Type
New-3 Phase Pre-Trim-Final

Installation Type
New-3 Phase Pre-Trim-Final

Payment Method Update
Percentage

Click Reset Payments after changing Payment Method

Payment Steps

Message

Caution!
This is a Project or Final Change Order and a Client has accepted the original Install Type.
For this reason Changing the Install Type is not permitted.

OK

Payment	Step 3 Payment	Holdback
Payment 2	Payment 3	Hold Back
Due 10 days before the installation prewire phase.	Due 10 days before the installation prewire phase.	Due at the completion of the installation.
%	30 %	10 %
Amount	Amount	Amount
\$3,278.33	\$9,835.00	\$3,278.33

Total Payments: \$32,783.33

Phase 1 Total \$ Phase 2 Total \$ Phase 3 Total \$

Warning:
The Proposal Total and the Payment Total must be equal to each other!

If Rounding .01 Off:
Check Master Prefs Install Types and Global Proposal Price Adjuster
Try adding .005 to a Payment

Click Reset Payments after changing Payment Amounts

Totals Update Payments

Proposal	\$32,783.34
- Payments	\$32,783.33
Difference Must = \$0	\$0.01

Payment Step Director

	Step 1	Step 2	Step 3
Payment Director	1	2	3
Products	1	2	3
Labor	1	2	3
Parts	1	2	3
Wire	1	2	3
Fees	1	2	3

Project/PO/Main Screen: New Features

PO Screen GUI has been improved for better clarity and usage.

Add PO button and View PO button have been switched position

If you have PO's that are not Posted, you will see this Caution message.

If you try to Add a PO, when you have Unposted PO's you will get a message to Post them, before adding more PO's.

Show All		Phase 1		2	3	Purchase Orders - All - 8 Products										PO	WO	SI	Home				
PO Reports & Utilities		Mike & Jessica Potter										To Order		Back Order		View P.O.'s		Leave					
		1282.1-1.100										Products		0		23		Auto Set PO Qty		Add PO			
PO Products		PO Parts		PO Wire		Sum		Proj		Phantom		Orphan											
Phase		Qty Sold		Caution: You have 2 Unposted Invoices - Please Post or Delete them		Qty		Qty		PO Status													
Zone - Area		Delivered		Make : Model		Product Library		Finish		Vendor ?		Staged		To Order		PO Qty		Ordered Staged		Recvd to date		B/O	
CO#				Updated		Unit Cost		Project Cost		Alternate Vendor		On Hand		Min Qty									
3		1 ea		aaaaPosting Test : 1111		9/2/2020		\$50.00		\$50.00		Runco				0				1		1	
3		2 ea		Linn : 5101 Personal Handset		2/16/2021		\$234.00		\$234.00		Klipsch Audio		2		2				2		2	
3		2 ea		Linn : 5125		6/2/2011		\$1,650.00		\$1,650.00		Runco		4						2		2	
3		10 pr		Linn : Katan		6/2/2011		\$597.00		\$597.00		Klipsch Audio		12						10		10	
2		2 ea		Linn : Knekt RCU		6/2/2011		\$450.00		\$450.00		Runco		1						2		2	
3		2 ea		Linn : Melodik		6/2/2011		\$2,970.00		\$2,970.00		Runco		1						2		2	
3		2 ea		Runco : CL-610		6/2/2011		\$4,797.00		\$4,797.00		Horizon		1						2		2	
3		2 ea		Sony : DVP-NS999ES		6/2/2011		\$620.40		\$620.40		Horizon				0				2		2	

Show All

Phase 1

2

3

Purchase Orders - All - 7 Products

PO

WO

SI

?

Home

PO Reports & Utilities

Mike & Jessica Potter

1285.1-1.100

To Order0

Back Order11

Products

Global Buy Pkg Off

View P.O.'s

Leave

Auto Set PO Qty

Add PO

PO Products

PO Parts

PO Wire

Sum

Proj

Phantom

Orphan

Caution: You have 3 Unposted Invoices - Please Post or Delete them

Make : Model

CO#

Updated — Master Cost

Project Cost

Avg PO Cost

On Hand

To Order Qty

PO Qty

Sum M - PO Status

Ordered

Staged

Recvd to date

B/O

Phase	Zone - Area	Qty Sold	Delivered	Make : Model	CO#	Updated — Master Cost	Project Cost	Avg PO Cost	On Hand	To Order Qty	PO Qty	Sum M - PO Status	Ordered	Staged	Recvd to date	B/O
3		1 ea		Linn : 5101 Personal Handset		6/2/2021	\$50.00	\$50.00	Runco	0	1					1
3		1 ea		Linn : 5125		6/2/2021	\$1,650.00	\$1,650.00	Runco	0	1					1
3		5 pr		Linn : Katan		6/2/2021	\$597.00	\$597.00	Klipsch Audio	0	1					5
2		1 ea		Linn : Knekt RCU		6/2/2021	\$450.00	\$450.00	Runco	0	1					1
3		1 ea		Linn : Melodik		6/2/2021	\$2,970.00	\$2,970.00	Runco	0	1					1
3		1 ea		Runco : CL-610		6/2/2021	\$4,797.00	\$4,797.00	Horizon	0	1					1

Message

You have Unposted PO's.
Click View PO's and Post them before Adding new PO's.

OK

Message

You have Unposted PO's.
Click View PO's and Post them before Adding new PO's.

OK

Project/PO/PO List: New Features

When you click the Done button, you now have the Option to Exit without Posting the PO's.

You can also now Delete individual PO's from this screen.

Project - Purchase Order List

Mike & Jessica Potter
Home Theater System
1285.1-1.100

Global PO Module

PO Summary

Print & Post All PO's
Post All PO's

Done

Show All PO's
Posted PO's
Not Posted PO's

Del	View	Type - Status	PO Status	PO #	PO Date	Vendor	PO Total	Project	Posting Date	Print Post
		PO	Closed	1111	2/15/2021	Horizon Software	\$450.00	1285.1-1.100	Not Posted	
		PO	Closed	1112	2/15/2021	Klipsch Audio Technologies	\$3,590.40	1285.1-1.100	Not Posted	
		PO	Closed	1113	2/15/2021	Runco International	\$9,666.00	1285.1-1.100	Not Posted	

Message

You have Purchase Orders that have not been posted.
Cancel to post and print these PO's
Delete to delete all unposted PO's for this proposal.
Exit to leave this screen without Posting PO's

Exit No Post Delete Cancel

Project/PO: Project/PO Invoice: New Features

Improve screen GUI for better clarity

Add Item button and Edit/Delete Label

Add Item button enables you to Add Items to this PO

An Edit/Delete button enables you to Modify this Item or Delete it.

You can now UnPost this PO, if you need to modify it after it has been Posted.

Project - Purchase Order Detail

Post PO ☒ UnPost ☐ Prev/Next ?

Do not show Client/Project info on PO

Vendor Address: Horizon Software, S. 15700 Hwy U, Strum, WI 54770

Ship To Address: EME Audio & Video Systems, 100 Purchasing Lane, Purchasing City, WI 567937

Posted 2/16/2021

PO Number 1120 - 1282.1-1.100

User PO #

PO Date 2/16/2021

Buyer: Joe Buyer

Buyer Override:

Shipping Method: Best Way

PO Terms:

1282.1-1.100 Mike & Jessica Potter

PO Notes

Receiving PO Status: Open

Auto Receive All PO Items

Date Received

Received By

Receive View-Edit

Qty Recvd

Qty Open

PO Total \$10,834.80

Order Qty	Edit Delete	Make Description	Model SKU	Finish Item Notes	Unit Cost	Ext Cost	Receive View-Edit	Qty Recvd	Qty Open
2 ea		Runco DLP Projector	CL-610		\$4,797.00	\$9,594.00			2
2 ea		Sony Progressive Scan DVD	DVP-NS999ES	Black	\$620.40	\$1,240.80			2

Add Items to PO

Setup Email Vendor Delete PO **Project - Purchase Order Detail Not Posted** Post PO ☒ Prev/Next ?

☐ Do not show Client/Project info on PO

Vendor Address ☒ **Ship To Address** ☒ **UnPost PO** ☒ **Done**

PO Number 1111 - 1285.1-1.100 **Show**
☐ PO Number
☐ User PO#
☐ Client Name
☐ Hide Prices

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

EME Audio & Video Systems
 100 Purchasing Lane
 Purchasing City, WI 567937

User PO #
 PO Date 2/15/2021

Buyer: Joe Buyer
 Buyer Override:
 Shipping Method: Best Way
 PO Terms:

1285.1-1.100
 Mike & Jessica Potter

PO Notes
 PO Total
\$450.00

Closed **Receiving**
 Auto Receive
 All PO Items
 Date Received
 Received By

☐ Global Buy Pkg Off **Add additional Items to PO**

Order Qty	Edit	Make	Model	Finish	Unit	Ext
Buy Qty	Delete	Description	SKU	Item Notes	Raw Cost	Raw Cost
1 ea	<input type="checkbox"/>	Linn	Knekt RCU	White	\$450.00	\$450.00
		Knekt room control unit				

Receive Qty Qty
 View-Edit Recvd Open
 Receive

Project Manager/PO: New Features

Improve screen GUI for better clarity

Add Closed button to find all Closed PO's

We are open to suggestion on improving the Global PO process, so please let us know what you think.

Find PO's		Global Project - Purchase Orders				Global PO Help ?		Home					
Show All PO's		<div>1. First create your PO's from within each Project 2. Pick the underlined Vendor to Group PO's by Vendor 3. UnStage (uncheck) unwanted PO's 4. Click on Create Global PO to create a new Group PO 5. Choose Combined Line Item or Separate Line Item PO</div>				Set/Clear Staging		Done					
Open Closed						PO's WO's Sfs		Create Global PO					
View	Project	Project PO Number	User PO #	QB PO #	Posted Date	Status	Pick Vendor	Global PO Staged	Global PO Created	Global PO Number	Date	View Reprint	
	1285.1-1.100	1114			2/16/2021	Open	<u>Horizon Software</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Potter, Mike & Jessica												
	1285.1-1.100	1115			2/16/2021	Open	<u>Klipsch Audio Technologies</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Potter, Mike & Jessica												
	1285.1-1.100	1116			2/16/2021	Open	<u>Runco International</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1074	2/16/21		<input type="checkbox"/>
	Potter, Mike & Jessica												
	1282.1-1.100	1120			2/16/2021	Open	<u>Horizon Software</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Potter, Mike & Jessica												
	1268.1-1.100	1074			9/12/2006	Open	<u>Runco International</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1074	2/16/21		<input type="checkbox"/>
	Berkow, Dana												
	1284.1-1.100	1075			9/12/2006	Open		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Smith, John & Mary												

Contacts: Modify Delete Criteria

Contacts without data in any fields can now be deleted.

Find Contacts		Fav A		B	C	Contacts - List View																	Utilities		Home			
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		
Clients	Users	Other Views										EME audio & video										Add Contact		Leave				
Vendors	Locations	22 of 22 Contacts																				Print - Export Menu						
Contractor																												
Add Proposal	Add Task	View																										
Fav	POS	Task	Entities	Fav Name		Company		Category		Fav Phone		eMail Info																
<input type="checkbox"/>				Back, Eileen				Client		(H) 608-989-2387																		
<input type="checkbox"/>				Bashir, Sikandar				Client		(M) 612-817-2242																		
<input type="checkbox"/>				Berkow, Dana				Client		(H) 650-591-2996																		
A				Burkes, Tom & Kelly & Family		Sunbelt Business Brokers		Client		(W) 831-624-5600																		
<input type="checkbox"/>				Callahan, Hayes				Client		(W) 715-287-4592																		
<input type="checkbox"/>				Campbell, Mike				Client		(M) 262-853-7418																		


Product Library: Add button Validation

Ensure that All records are Showing when Adding Product, so there is no error message

Find Products										Show: Makes <input checked="" type="checkbox"/> Groups <input checked="" type="checkbox"/> Hidden <input type="checkbox"/>										Product Library - Line List										Utilities	▼ ▲ ▼ ▲	?	Home
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							
A	Product Class		Hidden Products										<div>EME audio & video</div>										+ Add Product	Detail List	Leave								
B	Part	Phantom	Discontinued																					Product Sets									
C	Bulk	PreCut	Supplements																				Found 58	Total 61	Inventory	Utility Lists	Print Menu						
Lab	Part	Wire																															
Fav	Groups										View										Sell Price										Inv	Tag	
Class	Discipline	Cat	Type	Suppliments										Make	Model : SKU										Description	Finish	Installed	Cue	Hide				
A	Audio	Speak	Center Channel	<div><div></div><div></div><div></div></div>										Klipsch	RC-35										Center Channel	Black	399.00 ea						
A	Audio	Speak	Floor	<div><div></div><div></div><div></div></div>										Klipsch	RF-35 (6483)										Reference	Black	499.00 ea						
A	Audio	Speak	Bookshelf	<div><div></div><div></div><div></div></div>										Klipsch	RS-7										Reference	Matte	450.00 ea						
A	Audio	Speak	Powered Subwoofer	<div><div></div><div></div><div></div><div></div></div>										Klipsch	RSW-10										Reference	Black	1,000.00 ea						
A	Audio	Multi	Keypad	<div><div></div><div></div><div></div><div></div></div>										Linn	5101 Personal Handset										Universal	Black	600.00 ea						
A	Audio	Ampli	Surround Processor	<div><div></div><div></div><div></div></div>										Linn	5103 System Controller										Linn 5103 inc		5,500.00 ea						
A	Audio	Speak	On-Wall	<div><div></div><div></div><div></div><div></div></div>										Linn	5110-W										Pair of on-wall	White	325.00 ea						

Product Library: Utility Done button

Speed up Done button return to Product Library

All	Product Library Utility - Clean & Delete						61 of 61	?	
All 61 Products 61 Current Products									
Clean Groom	Reset Update	Find Change	General Import	User Import	Accounting Import	Distributor Import	Export Products	Done 	
Clean - Product Make, Model, Desc & Group Fields This will set remove any blank spaces, carriage returns and quotes from the product Make, Model, SKU, Description, Features and Group fields. <div>Clean Fields</div>			Groom CAPS in Product Descriptions This utility will change all Product Descriptions to Title Case and Replace words with CAPS that you specify. <div>Groom CAPS Descriptions</div>						
Goom - Clear Favorite Flags This utility will clear all of the Fav flags on all of the Products in the Product Library. <div>Clear All Favorite Flags Clear A Clear B Clear C</div>			Groom Product Makes This utility will change all Product Makes to Title Case <div>Groom Makes</div>						
Clean - Clear Recently Picked Product History Use this utility clear all Recently Picked Product History. <div>Clear Recent History</div>			Groom - Set all Blank Disciplines to "Equipment" This will set all Disciplines that are blank to your 1st Contract Subtotal Label or "Equipment" so that they will function properly in Proposals. <div>Set Disciplines</div>						