SmartPartner Software

Automated Proposal & Project Management System

2005 SCPS Revisions

SCPS Version 4.6
Released: 12/13/2005

Enhancement – Contacts/Entities/POS Portal
Add a new Portal in the Contact/Entities screen that lists all of the POS Invoices for that contact with a button on each that enables you to directly access them.

Enhancement – Contacts/Entities/Proposal and POS Portal
Return to the Contact Entity screen after viewing both Proposals/Projects and POS Invoices selected from these portals.

Enhancement – Product Library/Sort by Make
Change the way the library sorts when you click on an underlined Make so that it sorts by Make and Model instead of by Group and then Make and Model.

Enhancement – Proposal/Project Entities/Find Entity Utility
The "Find" utility has been enhanced so that it responds much more quickly, even with a large number of Entities in the system.

Enhancement – Proposal Overviews
Overviews can now be up to 3 pages in length.

Enhancement – Project/Work Orders
Add Cross Street addresses and all client phone numbers to the Work Order

Enhancement – Contacts/Favorites
Add separate Find Favorite A, B, C icons to all screens.

Fix – Project/Change Orders and Proposal Areas & Products reports
Adding products with negative quantities will now show these products in these reports. Additionally, the system will also add the quantity properly in the Product Summary report.

Fix – Proposal/Print Menu/Grand Total by Area report
Remove the header label that says "Totals include Supplements and Tax".

Fix – Proposal/Supplements added as Products
Under some circumstances Parts and Wire added as a Product and not as a supplement was not picking up the time and hourly rate. This has been fixed.

Fix – Project/Change Order Preferences
Change Orders now pick up the Project Preferences instead of the Master Preferences when creating a new Change Order.

Fix – Project/Change Order Fees
When selecting the "Do not Add Fees to a new Change Order" option the Master Fees defaults are no longer blanked out.

Fix – Proposal/Product Qty/CO status indicator
Under some circumstances changing the qty on products in a proposal was stamping those products with the CO status code A for Added and D for Deleted. If this has happened to you, you can clear those codes using a utility in the Proposal Detail Utility screen.

Fix – Proposal/Client Project screen Print button
Printing the client project report now does not get stuck on the Horizon blank screen when printing.

Fix – Project/Change Order: Changing the price of a changed product
When you create a CO product you have the option to change the sell price of the new product. This new price now shows up on the Change Order.

SCPS Version 4.5
Released: 11/22/2005

This is a mandatory upgrade for users of SCPS 4.4

Critical Bug Fix – For users of SCPS version 4.4 only.
Under some circumstances. Picking Product Sets was pulling the products into the wrong proposal. This has been fixed.

Enhancement – Contacts/Entities
Add a new Contact screen that lists all of the Proposals, Projects, Change Orders, Completed Projects and Archived Proposal in a portal, with a button on each that enables you to directly access them.

Enhancement – Contacts/Screens
Modify the contact detail screens for easier use and clarity.

Enhancement – Contacts Address/Cross Street
Add Current and Future Cross Street fields to the addresses for location reference.

Enhancement – Contacts Address/Site Directions
Add a Site Directions button to the contact address section.

Enhancement – Proposal/Supplements
Make labor, parts and wire totals Live so that you do not need to use the $ button to view totals.

Enhancement – Proposal Detail and Pricing screen/Profit per hour indicator
Add a Profit/Labor Hours indicator number to the screen that gives you an idea of the profit per labor hour ratio of the proposal.

Enhancement – Proposal Area & Products: Zone Incrementor
Next to the Zone field is a Zone number incrementor button that will take whatever zone is currently displayed in the zone field and increment it by one.

Enhancement – Product Library/Hide Products
Add a Hide Products check box to the Product Detail screen.

Enhancement – Product Library/Find Products
Add a Find Products button to the Product Detail screen.

Improvement – Change Order/Hide Product Amounts Print Preference
Fix the product amounts so that the numbers are hidden if the Hide preference is checked.

Improvement – Flanners Custom Proposal Payment Calculator
Fix this calculator so that it works with the new Proposal Totals structure.

SCPS Version 4.4
Released: Nov 8, 2005

Enhancement – Post Original Project Totals
When a proposal is converted into a Project all of the Subtotals/Tax/Grand Totals are fixed and posted in the Master Project Pricing screen. This makes it easy to

compare the Original Project (the one the client signs off on) and the Master Project totals which includes all of the Final Change Orders.

Enhancement – Proposal/Fee/Live Totals Display
Display All Fees Subtotals and Grand totals all of the time, so that you do not have to click on the $ button to view them.

Enhancement – Project/Sales Invoices/Auto Set
Auto Set feature now enables you to Auto Set quantities on Labor and Fees as well as the normal Products, Parts and Wire.

Enhancement – POS/View Icons
Move View icons to the left side of all of the POS List screens.

Enhancement – RCMS Auto Product Data Import routines.
Enable Definitive and Listen Up auto import feature. Requires Installation of the Events Plug in and RCMS user set to dealer name in the Bookkeeping RCMS screen.

Enhancement – RCMS Product Library Show Status Code for Listen Up
Requires RCMS user set to dealer name in the Bookkeeping RCMS screen.

Enhancement – Master Tracker – Find Milestones
Add check boxes in the Find Tasks screen for finding Milestones. So you can now click on a Project and then check off one of the Milestones like Payments and get a list of all of the Payments for that project. Other Milestones are Proposal Due date, Installation Phase dates and Phase Purchasing.

***Critical Improvement – Proposal/Product Migrations
Under some circumstances Picking products from the Product Library were going into other proposals. This has been fixed.

***Critical Improvement – Proposal/Areas Deletion that deletes Fees.
Under some circumstances the Proposal fees were deleted when an Area was deleted in a Proposal. This has been fixed.

Improvement – Proposal/Areas & Product report – Installed product prices
Installed price of products (assuming the show installed price option is checked in the printing preferences) now shows the proper extended labor amount.

Improvement – Project/Sales Invoices/Tax
Sales tax is now properly calculated for Equipment, Parts, Wire and Labor on Sales Invoices.

Improvement – Project/Sales Invoices/Cancel

If you try to go into the Invoices module and Cancel at the pop message you were left in a project without a system record. Now you return to the entire project.

Improvement – Archived Proposal Deletion
Delete button now deletes Archived proposals.

Improvement – Proposal/Print Menu/Labor Detail Report
Add total labor subtotal to this report.

Improvement – Proposal/Print Menu/Proposal by Discipline and Phase Reports
Correct the Proposal Total Amount fields to display the proper amounts.

Improvement – Proposal/Print Menu/Proposal by Area for User Reports file
Add a Master Proposal by Area report with no prices to the User Reports file.

Improvement – Proposal/Print Menu/Proposal Summaries/Sub & Grand Totals Labor
Remove Labor Time from these Client Reports. Labor time is still available on the Shop versions of these reports.

SCPS Version 4.3
Released: Nov 2, 2005

Enhancement – Proposal/Print Options/Show or Hide Fees amount
Incorporate the Print Option to Show or Hide Prices into the Fees Report to show or Hide individual Fee amounts

Enhancement – Proposal/Product Labor Supplement Detail Screen
Add the ability to either Add or Edit Labor Supplements from this screen.

Enhancement – Add a County field to the client Contract and Reports
Contacts now have a County field as well as a Country field.

Fix – Proposal Fees
Fees based on a Percentage of the Grand Total now pick up the new Grand Totals numbers which do not include Parts, Fees or Tax subtotals. The Parts subtotal cannot be included, in the "Grand Total" because this would cause a circular reference, if the "send to Parts subtotal" is checked.

Fix – Proposal Areas & Products Report/Hide Area Prices
Fix the Hide option so that Labor and Area Total do not show on report when the Hide Option is selected.

Fix – Proposal Contract Report
Format merged Proposal Totals into the text with a $ and thousands "," separator.

Fix – Proposal Labor Summary report
Report now prints one page instead of a page for each product in the proposal. Removed the zk field from the report layout.

Fix – APM Automated Project Manager, Task Information
Include client address, phone, fax and email for Tasks manually created in the APM as they are for automatically created Project Tasks.

Fix – APM Automated Project Manager, Project Payment Milestones
Only create a Project Payment Milestone if there is project payment amount for the deposit, phase 1,2, 3 or retainer.

Fix – Automatically Open Task Calendar in Sharing mode for network multi-user sharing.

Fix – Print Pending Change Orders from the Areas & Products screen
This print button now works properly and prints the report instead of a screen dump.

Version 4.2
Mandatory Upgrade
Released: October 28, 2005

Fix – Upgrading Proposals with labor Degree of Difficulty
The Proposal Degree of Difficulty is now picked up on labor records when upgrading.

Fix – Proposal Picking Products
Remove the error message that says: This field cannot be modified"

Fix – Access to the CPS software button from within SCPS
Connect the Logo screen CPS button so that it functions properly.

Fix – Proposal/Supplement Detail screen
Remove error message that says: This is a Finalized Change Order

Version 4.1
Released: October 27, 2005

Fix – Proposal Labor Supplements
When adding a pure Labor Supplement to an Area in a Proposal the Labor time and Amount is now adding properly to the proposal, along with the correct degree of difficulty percentage.

Version 4.0
Released: October 26, 2005

Building the Perfect Beast! We're not perfect yet, but this new 4.0 release is a major improvement in performance and functionality. There are four major aspects to this release and literally hundreds of other improvements.

First is **Speed**. It took six weeks of intense and innovative programming to restructure virtually all of the calculations that SCPS makes. Speed of course depends on the size of the proposal and the Pricing/Payment screens, as well as the Contract report, require the most processing, but even they are quite fast.

SCPS beta testers are calling SCPS "zippy" and that makes us smile. Let us know what you think.

The second major improvement is the new **Change Order** module that disconnects the Final Change Orders from the Master Project. CO payments are now handled separately from the Master Project Payment plans. CO products and labor however are rolled into the Master Project for Purchasing, Work Orders and Invoicing.   You now have five states that the Proposal/Project goes through.

1. Proposal
2. Original Project
3. Pending Change Order
4. Final Change Order
5. Master Project (which includes the Original Project and the final CO's)

With the new Master Project Payment screen you can now see all the Payment Details of the Original Project, the Final CO's and the Master Project all ONE screen.

The third improvement is the **Project Manager**. This is a global module that enables you to view and manage all of your projects from one screen. This release features the Project Payment Manager. By seeing all of the Payment details of all of your Projects and Change Orders on one screen you can ensure that your customers make their payments on time and that you record those payments. You can also see the grand total of all of the payments coming due,

the totals of all of the payments that your clients have made and the remaining balances due. This module should have a dramatic effect on your cash flow.

The fourth major module is the **Automated Master Tracker.** This module is designed to inform each member of your staff: **what** has to get done; **who** needs to do it; and **when** it needs to be finished. All of the Milestones and Tasks for all of your Proposals, Projects and Completed Projects are stored and managed in **AMT**. Each user can be automatically emailed their daily to-do list which includes all of the details they need to take care of the Sales, Payment, Installation and Purchasing Milestones and Tasks that are due for all of their Proposals and Projects.

In addition users are notified of all of the General Tasks and Appointments that they have.   Administrators and Managers can automatically receive a CC email to monitor activity. When these Milestones and Tasks are completed they are stored in the customer's history for future reference.

The Automated Master Tracker makes is easy to create and find Milestones, Tasks and Appointments for all of the activities required to efficiently complete your projects from beginning to end.

One of the most exciting aspects of the AMT is that all of the Milestones and Tasks dates are driven by the Project Installation Phase dates. So all you have to do is maintain the start dates of the Pre-wire, Trim, and Final install phases of your projects and all of the Milestone and Task dates in the AMT will shift accordingly. Automatically!

Horizon can provide you with training on these modules. Investing in learning how to maximize the potential of your SmartPartner software will improve your sales, profits, and customer satisfaction, as well as employee performance.

Of course let us know how you like the new rev and/or if you find any bugs.

Enjoy…

Download Additional Help Guide
http://www.horizon-software.com/download/SCPS_4.0_features_addendum1.pdf

Master Tracker Automation – Users can now set the Automatic Project Tracker to automatically email SCPS users at regular intervals without user assistance. This feature requires the Auto Events plug in which is available for $249 and a configuration session. Please contact Horizon if you would like this feature.

Master Tracker Calendar – Any Tasks, Milestones and Appointments selected from the Tracker screen can be displayed in a traditional looking calendar that has month, week and day views. Clicking on any of these in the calendar will pop up information details about that Task, Milestone or Appointment.

RCMS Automation – RCMS users can now set SCPS to automatically import their products from RCMS at regular intervals without user assistance. This feature requires the Auto Events plug in (which is available for $249 and a configuration session. Please contact Horizon if you would like this feature.

Enhancement – Proposal Payment screen Clear payment amounts
Sometimes if you put manual payments into the payment phases and then change the Installation type to a type that has less phases, those amounts will be hidden and cause your payment total to be wrong. There is now a delete icon on the Payment screen to remove all of the payments, even the hidden ones.

Enhancement –Change Order Reports
Pending and Final Change Order reports now have an improved header format.

Enhancement – Proposal/Product Supplement Screens
These now have an easy access blue icon on each supplement for adding and editing supplements directly from the Supplement screens.

Enhancement – Proposals, Projects, and Area Screens
These now show grand and subtotals in real time, and no longer require pressing the $ button.

Enhancement – Proposal and Project List Screens
The Sort icon for these two list screens has been moved.

Enhancement – Proposal/Product Detail/Specs
Front and Back Panel pictures can now be added from product library.

Enhancement – Proposal/Product Line List report
A new report has been created that reflects the Proposal Line List screen.

Enhancement – Project Supplements
You can now **view** all of the Labor, Parts, Wire and Task supplement screens in a Project. However, you will not be allowed to modify any settings from this screen.

Enhancement – POS Invoices
The Terms field has been changed from Condensed text to normal Text for improved printing.

Enhancement – Project/Work Order Sort Product Field
A placement/sort field has been added to the Work Order Invoice so that products on the WO can by manually sorted and printed that way. This overrides the normal product placement code.

Enhancement – Project/Work Order Install Date Addition
A Product Installed date has been added to the Work order screen and report, so that the date can be logged, as well as the quantity of each product, when the installer returns the work order at the end of the day.

Enhancement – Master Preferences-Payments for Change Orders
A new Payment Plan defaults function has been added specifically to support Change Orders.

Enhancement – Proposal, Areas, and Products Screen
A Zone field has been added next to the Area field so that you can enter the Zone number at the same time that you enter the Area name. The Zone number you enter will stay there so that you can create all of the Areas for that Zone in succession.

Enhancement – Project/Work Order Sort Product Field
A Placement/Sort field has been added to the Work Order Invoice so that products on the Work Order can by manually sorted and printed that way. This overrides the normal product placement code.

Fix – Project Print Option
Creating a new Change Order now picks up all of the Project Print Option settings instead of the default settings.

Fix – Change Order Reports
The Placement Code has been removed from the Zone – Area titles.

Fix – Proposal/Project Communication Log
The Communications Log was adding log entries to the Contact instead of keeping them unique to the proposal or project. There is now a Utility button on the upper left corner of the Com Log screen. You will need to copy log entries from the Old Log and Add/paste the ones that are specific to this Proposal/Project, into the New Log.

Fix– Prop/Project Lists
Totals can now be sorted in ascending as well as descending order.

Fix– Change Orders: Tax Location
Change Orders now pick up the Tax Location from the Master Project instead of the Master Preferences.

Fix – Proposal/Payments Screen
The Retainer/Percentage field is now editable for 1 and 2 phase installations.

Fix – Product Sets: Orphaned Subset Indicator
The Orphan indicator will now show when a product in the product library has had its Make or Model number changed. If it has changed, then these Subset Products in the Set will need to be updated.

Version 3.0 – Build 450v2
Released: Sept 14, 2005

Enhancement – Proposal/Projects/Communications Log
Change Notes and Communications screen to an expanded communications log and move the client permanent log screen to the main Client screen.

Enhancement – Prefs/Horizon/eCare button
Connect eCare to the new eCare 4 web page

Enhancement – Replace all View buttons
All view buttons in SPS now have a new look.

Enhancement – Pending Change Order
Remove the word Pending from the printed CO

Fix – Master Prefs/Overviews: Done button
When editing an Overview the Done button now returns you to the Overviews screen instead of the exit screen.

Fix – Proposal Print Menu: Print All buttons when using the User Reports file now no longer cues you up for printing or previewing.

Fix – Project Change Orders: Deleting a CO from the CO portal now does not delete all CO's. It really was not deleting all CO's, but it appeared that way.

Fix – Final Change Orders: On some Final CO's the CO would not preview or print. This has been corrected.

Version 3.0 – Build 450v1

Released: August 31, 2005

Enhancement – Proposal Pick Parts and Wire as Products
When picking Products classified as a Part or Wire to add to a Proposal, we now are picking up the phase of the Group assigned to the Part or Wire, but the labor time is the Default labor time not the Group Assigned Labor, which is as it should be. We also not pick up labor times on Parts or Wires even it there is only the default Group (Equipment) assigned to the Part or Wire.

Version 3.0 – Build 450
Released: August 23, 2005

Enhancement – Speed Enhancement: Proposal/Print Menu/Contract
Remove the payment screen from the preview/printing process to greatly improve the speed of printing the contract in large proposals.

Enhancement – Speed Enhancement: Increase the speed of going to the Payment screen and the Contract by eliminating double posting routines.

Enhancement – Proposal Supplements Screens
Add a button to go directly to the Product/Supplement detail screen from any supplement.

Enhancement – Proposal Task Supplements
Refine the process of adding additional Tasks to any product and sort the Task Portal by Priority.

Enhancement – Proposal Zone 0 and Zone 99 displays blank zone numbers on all screens and reports. 0 zones sort 1st, then zoned areas, then zone 99.

Enhancement – Proposal/Client Project Screen
Add Shop address on the Proposal Project screen under store location.

Fix– Proposal/Labor Tax
Fix Labor Tax posting when going into the Pricing screen.

Fix– Proposal/Project/Shop Print Menu: Product Task Report
Fix the Printing of Product Supplement Tasks from Shop Print Menu when the phase selection options are used.

Version 3.0 – Build 440v.3
Released: August 18, 2005

Enhancement – Remove Minimum Sell Adjustment Upgrade routine for a faster upgrading process.

Enhancement – Proposal/Payment screen speed Improvement

Version 3.0 – Build 440v.2
Released: August 17, 2005

Fix – Speed Improvement
Major speed improvement when navigating through SCPS after leaving the Proposal Payment screen. By hiding the payment screen in the background it is not always trying to calculate the payment numbers as you navigate.

Fix – Proposal Replace Product Routine now returns to the Proposal Product Line List.

Fix – Project Payment Screen
Hide the Payment % and Manual Payment Amount fields in a Project so that they cannot be changed. These should only be able to be changed in a Proposal.

Fix – Proposal Area Detail Screen/Product Group fields
Remove the Product Group field that was drawing from the Product Library instead of MainLine where the actual product is stored.

Enhancement – Product Library/Print Menu
Add all costs and selling prices to the Confidential Detail List report.
Add a Confidential Line list Report that just has Make Model and Prices.

Version 3.0 – Build 440
Released: August 16, 2005

Enhancement – Enable CPS users to access there CPS software while in SCPS so that they can transition from CPS to SCPS. Users who wish to do this should contact Horizon for the necessary files.

Enhancement – Project/Work Orders
Add the ability to select an Installer on a Work Order. You can choose any SCPS user and this name will go onto the Work Order.

Enhancement – Product Library/Find Products
The Model field pop list now only shows the models for any given Make that you select in the Make field. Instead of showing all of the Models in the library.

Fix – Wire Phase Numbers

Fix the wire phase number from showing the default wire phase to the actual wire phase on the Proposal Product/Wire screen and in the Wire Detail report in the Proposal Print Menu.

Fix – Upgrading Process – Pricing Sell Adjustment
When upgrading you used to lose the Minimum Pricing Sell Adjustment values. This will happen one more time during this upgrade and then you should reset any proposal that you had Auto Set the Pricing to Minimum Sell in the Pricing screen. If you did not use the Minimum Sell feature don't do this.

Version 3.0 – Build 420.3
Released: August 11, 2005

Enhancement – Change Order Product Status:
Stamp each Change Order Product with C=Changed, A=Added, D=Deleted. Show this Status on all Master Project (a project that has CO's), Purchase Orders, Work Orders, Sales Invoices screens. This status indicator will only work for products added to CO's after this upgrade.

Enhancement – Change Order Navigation:
Add an Option when Leaving a Change Order to go to the Master Project or the Project List.

Enhancement – Proposal/Print Menu: All reports in main and reports file. Add header line on second page.

Enhancement – Proposal/Product List screen: Refine this screen for better comprehension.

Enhancement – Change Orders: Return to the same Area after changing the qty of products in an existing Area so that you can easily continue to change other products in that Area.

Enhancement – Change Order: Add Optional Change Order Title to the CO Preferences so that it can be changed on Pending Change Orders, like it is on Final Change Orders.

Fix – Proposal/Labor Supplements/Labor by Phase/Print Report
Change this script to eliminate the deleting of this proposal when this report is run. Critical fix.

Fix – Project/Final Change Orders/Print.
Some Zone Area Names were not showing on the Final Change Order even thought all of the products were there. This has been fixed.

Fix – Proposal/Change Order/Entity Lock
Leaving a Change Order using the Home button now unlocks the Entity Lock feature the way it should.

Fix – Fix Proposal/Print Menu: Product Summary report from multiple discipline entries. Reports file as well

Fix – Remove 9 and 10 pop up when printing proposal

Fix – Add additional refresh so that going to Fees Description more that once is not blocked.

Fix – Change Order: Make sure that Groups assigned to products that are being changed retain the same group and not the current group assigned to that product in the Product Library.

Version 3.0 – Build 420.2
Released: August 9, 2005

Fix – Analyze blank contacts showing in Contact Manager
These are not new records, but old ones that are now showing due to a new find/sort order. Please delete any contact records that are blank.

Fix – Proposal/Print Menu/Proposal Phase Subtotal report:
Correct layout format so that subtotals and labels line up properly.

Fix – Proposal/Products/Supplements screen.
When leaving the supplements screen updating departments on any newly created supplements was looping through all of the supplements in the labor, parts and wire files. This has been corrected so updating is only done on one record.

Fix – Duplicating Proposals/Payments/Print Options/Pricing
When duplicating proposals some settings were reverting to master default preferences. This has been corrected. Please notify us if you find any other fields that are changing in the future.

Version 3.0 – Build 420
Released: August 4, 2005

Enhancement – Fees Subtotals by Phase
Add Fees Subtotals for each Installation Phase to the Proposal Subtotals by Phase screen and Subtotal Reports. Adding Fees now defaults to Phase 1. Fees without Phases in older Proposals automatically default to Phase 1, so if this feature is important to you then go through your Master Prefs Fees and set the Phase on your Fees and go into your Proposals and do the same thing.

Enhancement –Product Library/Parts, Wire and Task Supplements
Add a "Do not use" check box to the Group Assigned Wire, Parts and Tasks portals. Checking this box prevents the Group Assigned Wires, Parts and Tasks, for this product, from being added to a proposal when that product is picked. The Additional Supplements are still added to the proposal.

Enhancement – POS: Work Orders
Add payment amounts/descriptions/ and remaining balance to POS Work Orders.

Enhancement –Product Library/More Views/Price List
Add the Product Created Date, Modified Date and By User name to each product on this screen and then a Status Sort button so that all of the products on this screen can be sorted in Descending order by either, Created Date, Modified Date or By User name.

Enhancement – Change Order: You can now go directly to the Master Project directly from the Change Orders List view screen.

Enhancement – Change Order button on the Change Order is now highlighted and eables you to go into Change Orders List view screen

Enhancement – Proposal & Project Print Menu: Printing/Previewing Reports
When running each print/preview routine you now go to a Blank screen, instead of the report during processing. This speeds up the process and cuts down on confusion.

Enhancement – Proposal/Labor Supplements screen. Total Labor Hours
Add Total Labor hours to this screen. Selecting only certain areas in the portal will give hours for just that area.

Enhancement – Proposal/Pricing/Product Tax screen
Add a button that automatically set the Tax on all products to Tax, Installed Tax, Exempt.

Enhancement – Duplicating a Proposal/Project now clears the print date field in the Proposal Print Menu. This ensures that the wrong date is not accidentally printed on a duplicated proposal.

Enhancement – For our Canadian on foreign users.
Add a utility that will automatically set the Net Cost on products in the Product Library based on Exchange Rate. In the Master/Prefs/Other/Product 2 screen you can set the exchange rate. In the Product Library/Product Detail screen is an Optional Cost field (it will only show if there is an exchange rate). In the Product Library/Utility/Product Utility 1 screen there is a Button that will update all of the products in based on the Exchange Rate.

Enhancement – Finalized Change Orders/report:
Add Area text to the Finalized CO report.   This can be turned off and on in the CO preferences screen.

Enhancement – Modified the Custom Reports file to replicate the new Pending Change Order report.

Enhancement – Master Prefs/Other: Separate the Product Prefs into 2 screens. Products 1 and Products 2.

Enhancement – Master Tracker: Add Other Contacts
You can now assign Other Contacts to the Primary Task Owners. This can be set in the Prefs/Tracker screen for Proposal, Project, Completed tasks. You can see the Other Contacts assigned to each task in the Master Tracker by clicking on an icon on each task. It will pop up a list of the Other Contacts that have been assigned to that task. The Other Contacts will be emailed along with the Primary Owner of that task when they come due.

Enhancement – Contact/Utility: House Gadget, custom Outlook import.
1. Export data from Outlook with specified field order
2. Data imported will be merged with existing data based on First and Last Name and Company. Contacts that do not contain merge match will be added.

Enhancement – Contact Detail
Add the Notes field to the main Contact Detail screen for easy viewing. Notes screen still contains this field as well.

Enhancement – Project Invoices
Increase the size of the Store Logo and move the store address over to the side to reduce the size of the header section of the invoice.

Enhancement – Project Finalized Change Order
Add the Store Logo and reformat the header section.

Fix – Contacts/Utility: Delete all contacts.
This button now only deletes contacts that are not shop records, users (from master prefs) or contacts that are in proposals/projects/completed.

Fix – Duplicating Proposals/Projects.
This utility no longer duplicated Overviews records in the Master Prefs and the Text Library. It was duplicated them unnecessarily and caused a build up of records.

Fix – Proposal/Wire Supplements: Home and Room run buttons on each wire now take into account the Quantity of the product that the wire is assigned to. When switching a wires length between Home and Room run lengths, that length is now multiplied by the product qty.

Fix – Project Work Orders: Work Order Invoice/Entering Time when a tech returns the WO at the end of the day, not correctly adds the actual time you entered instead of entering a default time.

Fix – Project Sales Invoices: Navigation to the Parts screen after Auto Setting Fees amounts was showing all Parts in all Projects instead of just the Parts from that specific Project. This has been corrected.

Fix – Product Library: The Supplier pop up list in the Find Products screen was not showing all of the Vendors from the Contact Library. This has been corrected.

Fix – Project Shop/Pricing report
This report now prints the actual report instead of the Pricing screen.

Fix – Tax on Fees has been corrected on reports.

Fix – Proposal Payment screen: Actual Phase Payments not show the new Phase totals for each phase.

Version 3.0 – Build v400
Released: July 15, 2005

Enhancement – Proposal Reports: Product Discipline Print Option Refinement
Add a Print Preference to show the products in the Proposal Areas & Products and Proposal Product Summary reports organized by Discipline (as they have been) or by Make & Model. This feature has been added to both the Main Proposal Reports and the Custom Proposal Reports.

Enhancement – Project: Sales invoicing modules: Labor and Fees

Complete the Labor and Fees modules so that Project labor and fees can be invoiced incrementally as the project progress or all at once.

Enhancement – Printed Pending and Final Change Orders
Add Courtesy Discount Amount and Message to both Pending and Final Change Orders

Enhancement – Project Pricing Screen
Show discount in pricing screen even if the Show Discount print preference is turned off.

Enhancement – Proposal migrating Products Problem
Occasionally (this is a rare occurrence based on a specific set of circumstances) picking products into a proposal causes the products you picked to show up in another proposal. We have been trying to fix this but have not been able to replicate it here. As a stop gap measure, we have created a routine that automatically tags any products in a proposal or project that should not be there. This routine automatically sends us an email with the proposal and products it tagged and we will contact you to determine how those products got migrated and clean them up for you.

Enhancement – Contacts: Vendor Assignment
The interface for assigning Vendors to a Vender contact has been improved, so that you no longer check off Vendors from a pop up list, but instead go to screen that contains a list of all of your Makes from the product library and you can check off multiple Vendors for each make.

Enhancement – Project: Work Order: Print Task Report
Add a Print or Preview dialog box to this button, so that this report can be printed or previewed.

Enhancement – Project Change Orders: Print Options
Open up all Print Options for Change Orders so they have the full flexibility that Proposal Reports Have.

Enhancement – Master and Proposal Preferences
Improve the user interface and screen layouts for all of the Proposal Preferences in both the Master and Proposal Preferences.

Enhancement – Proposal Print Menu: Print Options
Add a feature that enables you to change Shop Locations so that all Proposal reports can be printed for any of the Shop Locations specified in the Master Preferences screen.

Enhancement – Preferences/Users

Adding a new user to the list, automatically creates that user as an "Employee" in the Contact list.

Enhancement – Project Change Order: CO Title
Show the CO Title under the Project Description on the CO Areas & Products screen and on the Pending and Final printed CO's in addition to the Project Description.

Fix – Contacts/AlphaFinder
All contacts created as Employees from Prefs/Users now show up when using the AlphaFinder.

Fix – Proposal Reports: Shop Locations
Match all Proposal Reports headers and footer to the correct Shop Locations as defined by the Location assigned to the User that is currently logged in to SCPS.

Fix – Project/Work Orders
Occasionally after converting a Proposal to a Project, when clicking on the Work Order button an error message asking you to delete an existing WO pops up even when no WO's exist. This has been corrected.

Version 3.0 – Build v380
Released: June 29, 2005

Enhancement – Proposal Print Menu/Preferences and Print Options
-Rework Preferences and Print Options navigation buttons for better work flow.
- Add contract 1 and 2 description labels that shows users what contracts to use.
- Add Pricing Subtotals selection to the Print Options screen.
- Add option to show or not show Degree of Difficulty on the Labor detail report.

Enhancement –Proposal/Print Options/Show by Disciplines or by Products
There is now a preference for Showing and Sorting products by Discipline or by Products in several reports.
-Proposal Area & Products Report
-Proposal Area & Products/Area & Products with supplement prices Report
-Proposal Product Summary Report

Enhancement – Proposal Text. Rework the proposal text screen so that area products are displayed below the Area list. Add a Category portal that displays all Text Categories from the Text Library. Clicking on a Text Category displays all of the text for that category in the Text portal. NOTE: If your text categories do not show in the portal then you can click on the utility icon at the top of that portal to refresh the screen. This should only need to be done one time to initialize the portal.

Enhancement – Change Order Preferences/Print Options
Open up the Preference/Print Options for use in Change Orders.

Enhancement – Change Orders - Full featured Pending Change Order report
Rework the Pending Change Order so that it resembles the Proposal Area &
Products report with all of it's printing and preference options.

Enhancement – Product Sets Library: Sets Notes
Add a sets notes field and pop up icon that can be viewed from the Sets List and
Pick Sets list. This is similar to the Product Notes in the Product Library.

Enhancement – Fees Display
Enable Fees to be viewed but not changed in Projects and Finalized CO's.

Fix – Change Order/Pending CO Report Areas
Pending CO now correctly shows CO areas.

Fix – Change Order/DOD Degree of Difficulty and Labor totals
Change Orders now need to retain the DOD % of the original project. If they
didn't then deleting products/labor from the project would delete the wrong labor
amounts. This caused Pending CO labor to be different then Finalized CO labor
which was the problem. Current Pending CO's will be automatically updated
when printed.

Fix – Change Order/Overviews
Overviews newly created in a CO are now retained.

Fix – Projects/Install settings
Prevent Installation settings such as Install Type and DOD from being changed
after a Proposal has been converted into a Project or Finalized Change Orders.

<center>
Version 3.0 – Build v360
Released: June 9, 2005
</center>

Enhancement – Proposal Print Menu: Proposal Summary Reports
Change the Make/Model/Description field so that it can be changed by the Print
Setup option to show listing as desired.   This affects the Proposals by Discipline,
Area and Phase reports.

Enhancement – Speed up the Fees screen
Entering the Proposal Fees screen is now much faster, because the Fee
amounts and totals will only be displayed by clicking on the $ button when
necessary.

Enhancement – Change Order Overviews
When you print a Pending or Final CO you now can choose to print Overviews selected for that CO. You are given that choice when you print a CO.

Enhancement – Change Order Print Preferences
Open up the Print Preferences button in CO's so that you can change the way a pending CO is printed, just like you can for a Proposal. Some options are current shown in red and they will be operational soon.

Enhancement – Proposal Cover page
Add Logo Tag Line under Logo on this page

Enhancement – Product Library: Bjorns Import RCMS data utility.
Change the import Map so that it does not not import Groups, Descriptions and Classification. Map minimum price to RCMS price C

Fix – POS Pick Products Rounding
When using the Auto Calculator on a product in the Product Library, Sell amounts were displaying more that 2 digits. When picking this products for POS invoices these extra digits were not showing but causing the totals to be off. This has been corrected.

Fix – Product Library/Print Menu/Product Detail Report
Remove second blank page when printing.

Fix – Product Library/Print Menu/Product Back Panel Report
Change routine so that you are returned to the Print Menu if no products have a picture in the Back Panel field.

Fix – Product Library/Print Menu/Confidential Product Price and Labor List
Correct labor times and totals using the new h:m:s format.

Fix – Product Set Library: Navigation
Change the way you enter the sets library from the Main logo screen and the Product Library so that it doesn't bring you to the Sets Pick List screen.

Fix – Product Library: Hide Hidden Products
Change the Find Product Library routine to ensure that hidden products stay hidden when finding products based on various find criteria.

Fix – Master Project/Purchasing screen now only displays products from Finalized Change Orders, not Pending CO's.

Fix – Project/Change Orders/Entity Lock

If you clicked on the CO button in a Project and clicked on Existing and then on the Project List and leave the project you had to reset the Entity Lock. This has been reset.

Version 3.0 – Build v340
Released: May 24, 2005

Enhancement – Proposal/Area and Products screen
Areas without products or supplements are now not automatically deleted from a proposal. You can now create blank areas and add text to them or leave them blank.

Enhancement – Proposal/Product Line List
A new Product Utility List has been added so that you can scan through a list of products in a proposal and change AB Tax, Supplier and Install phase.

Enhancement – Project/Work Orders
The Main Work Order screen now displays the Labor Time totals on the project, including the Project Time, the Installed Time and Labor Time Left.

Enhancement – Proposal/Area and Products screen
Supplements added to an Area now do not show the default Group..Equip:

Fix – Proposal/Fees Tax
Fees directed to the Parts and/or Labor subtotal now are taxed properly.

Fix – Project/Work Order
Deleting a WO from the WO detail screen now returns you to the Main WO screen instead of the main PO screen.

Fix – Project/Work Orders
Adding Actual install time to a WO now displays the time correctly.

Fix – Proposal/Supplements/Wire
Installation phase for each wire supplement is now correctly displayed.

Fix – Proposal/Areas and Products screen
Product navigation tab no longer can accidentally can go to Product Tax screen.

Version 3.0 – Build v320
Released: May 10, 2005

Enhancement – Project Change Order Portal
New method of accessing CO's by selecting them from a portal.

The > icon in the Project list still indicates that a Project has CO's. When you click on the >icon instead of dropping it down and displaying the CO's, you are taken to the CO portal screen, where you can see all of the CO's for that Project. You can select any CO as well as the Master Project from that screen. The Change Order button in a Project also now enables you to view existing CO's and/or Add a new CO.

Enhancement – Proposals/Projects AlphaFinder speed enhancement. The sort field has now been indexed for faster finding and sorting of proposals and projects when using the Alpha Finder.

Enhancement – Proposal Fees and User Access Rights Add additional access rights check boxes to the Prefs/Users/Access Rights screen to control the Services and Travel Fees screens. You probably should go into your Prefs/Users/Access Rights screen and make sure that these check boxes are set as desired for each of your users.

Enhancement – POS AlphaFinder Sorts have been improved to show last name, first name and the company sorted properly on all POS list views.

Enhancement – POS Work Order. The Installation Work Order has an installation warranty statement at the bottom of the printout. The warranty period can now be changed in Preferences/POS. The default if nothing is entered into this field is 90 days.

Enhancement – Product Library Parts and Wire: You can now choose not to display Products classified as Parts or Wire when you use the AlphaFinder. You can show them if you click on the Parts or Wire buttons. You can turn this preference off and on in the Preferences/Other/Products screen.

Enhancement – Product Library/Find products with Pix and Pdf's. There is now a Utility in the Utility/Utility 2 screen and in the Product Pix/PDF Utility to find all products that have Pix and/or Pdf's attached to them.

Enhancement – Improve Proposal, Project Detail screen header titles for better comprehension.

Enhancement – Project Work Order main screen now shows the Total Labor Time for the Project and the Actual Labor Time from issued WO's and the Time Remaining before going over budget.

Fix – Proposal Pick or Type Area problem When adding products in the Area & Products screen, if you click on the Area field when it shows Pick or Type Area name and then click the Add button, you were able to add products even though no area was selected. This problem has been fixed.

Fix – Entity lock issue.
Under some situations the entity lock feature would not release itself when returning to the Proposal or Project list screens. This mechanism has been changed to account for these situations.

Fix – Project Work Order Labor
WO's now show the correct total labor for the WO and the correct labor time for each product.

Fix – Deleting an Overview that was added to a duplicated proposal, no longer deletes that overview from the original proposal.

Fix – Finalizing a Change Order now keeps you in that CO instead of sending you to the Master Project.

Fix – Product Library: Hidden Products no longer show up when using the Find Products utility or the underlined Dept-Category-Type or Make find feature. Hidden products can only be show by going into the Find Products Utility/More Find Criteria and checking on the Show Hidden Products checkbox.

Fix – Project Work Orders: You can no longer accidentally enter actual install time into a Work Order until it is printed and posted.

Fix – Project Work Orders: Correct Actual Installation Time format to display hours:minutes:seconds

Fix – Proposal Pricing and all costing screens and reports. Equipment Profit amount is now correct when using the Automatic Pricing Calculator.

Version 3.0 – Build v302
Released: April 26, 2005

Enhancement – Speed Enhancement
Remove summary fields from MainTotal and MainLine Fast Open screens to eliminate summary calculation delay when navigating through SCPS.

Enhancement – POS Sales Invoice Option
A new style POS Sales invoice has been added. This invoice can be selected in in the Preferences/POS screen. It is titled Atlantic.

Enhancement – Product Library/Product Import Merge and Map
A second import type has been added to the Product Library Utility screen. This import type will Merge data instead of just adding it. It the make and model number of a product already exists in your product library, then the import will

update those products with new prices etc and add any products that don't exist in your library.

Enhancement – Contact/Communication Notes
Make another report for these notes that picks up the Contact info in the header. This report is similar to the one that is in the Proposals that picks up the Proposal info.

Fix – Proposal Print Menu/Shop Summary by Phase report
Correct the phase labor times and amounts on this report

Fix – Proposal Detail screen
Move the product description field to the right so there is no overlap from the model number field.

Fix – Project/Work Order/Wire Manager.
The Wire Manager in a Project now shows the CO wires and the wires that were in the original project.

Fix – Change Order
Area Value list now pops up with all of the area names

Fix – Project/Purchase Order
Received Quantity on a PO is now posted to the Received Qty fields instead of the Back Order Quantity

Version 3.0 – Build v290
Released: April 12, 2005

Enhancement – Speed Enhancement
Modifications have been made to the SCPS database to allow more calculations to be stored in ram instead of writing to your hard drive You must use FileMaker 6 to take advantage of this, so email Horizon and request a no charge FileMaker 6 upgrade if you are using 5 or 5.5. You must change the Memory settings in all copies of FileMaker 6 on your network. Open SCPS on each computer. Go into Preferences/FileMaker and click on the FileMaker Preferences button and then click on the Memory tab. Set the Cache size to 31234. You will then need to exit SCPS and reopening to engage the new settings.

Enhancement – Proposal Print Menu: Add an option when printing a Proposal to include or not include the Extra Text section. You will be asked to print it or not when you click on the Print All button.

Enhancement – Add Zone number to Areas in Project Workorders

Fix – Proposal Subtotal by Area, Phase and Discipline Reports had the Wire and Parts subtotal labels reversed and the Equipment Subtotal amount was not reflecting any global discounts that were applied to the proposal.

Fix – Proposal/Supplements/Labor/Labor By Phase Report. This report now only prints the Labor by Phase summary report and not many blank pages.

Fix – Proposal/Overviews: When Overviews had different sorting placement codes on them they would not always show up in the printed proposal. That is fixed now.

Fix – Project/PO; Cost on PO Products now picks up the raw cost of the product from the Product Library instead of the Loaded Cost.

Version 3.0 – Build v270
Released: March 24, 2005

Enhancement – POS Module: Restructure the entire tax mechanism on the POS module. Add A & B tax rates and switches to set the B rate to Tax-Tax Exempt-Installed@cost.

Note: Check out the Preferences/POS screen for these new settings: POS Invoice Tax and POS Invoice Tax Labels.

Note: Users that want to show the AB tax amounts on all of their existing POS Invoices should go into the Existing Invoices screen and click on the Utility button and then click on the Show AB tax on all invoices button.

Note: If you are using the B tax rate in your existing POS Invoices and you have tax exempted any line items on your invoices you will need to set the B tax flag on those items to E tax exempt. Otherwise that line item will pick up the B tax rate and add it to your tax total.

Note: Older POS WorkOrders may need to have their tax reset to the new tax rates. If you go into a WO and see that there are no tax rates showing at the bottom of the WO, please select one and you will be taken to a screen that shows you the old formatted tax rates and you can select a new one that matches the old one.

Enhancement – POS Module: When you click on the POS button you are now given an option to go to the Existing Invoice screen or to create a New Invoice.

Enhancement – Proposal Product Screen. Fine to this screen for better comprehension and usage.

Enhancement – POS: Expand Service Order; Description of Problem box on printout. Work Order; Make field border weight consistant on all boxes.

Fix – Proposal labor posting: Adding a product to a proposal now updates the Product/labor detail screen and the product line list screen.

Fix – Finalized Change Orders: Now prevent the user from entering the Product and Supplement and Fees screen as it should be.

Fix – Project PO, SI, WO screens. The Auto Set Qty button now sets all items, even those with a negative quantity (from Change Orders). When you create a Invoice and Print it those negative items will be subtracted from any like kind items so that the net qty is correct.

Fix – Project PO. Suppliers on products now stay intact when creating purchase orders.

Fix – Finalized Change Orders totals no longer pick up amounts from the Master Project totals and stay isolated.

Fix – Finalized Change Orders had wire and parts totals reversed on the printout.

Fix – Change Order Products not longer show up in the Master Project PO, WO, SI screens if the CO is Pending. They only show up if the CO is finalized.

Version 3.0 – Build v240
Released: February 22, 2005

Enhancement – Proposal incremental speed enhancements.
Changing the way the Adjust Pricing mechanism works has resulted in a 50% increase in the speed that all Product totals calculate on all screens and reports. Accessing the Proposal Pricing screen is now 50% faster by eliminating redundant labor posting routines.

Enhancement – Proposal Product Line List screen Adjust Pricing mechanism now enables you to automatically Adjust the Selling Prices of products in a proposal by Cost Plus, Margin and Selling Price. You can adjust all of the products in a proposal or you can adjust products by Group, Phase, Area, Make or Model. You can also adjust the selling prices by automatically setting the prices to the Minimum Sell price or establish prices back to their original sell price.

Enhancement – Proposal Product Line List screen.
Add Product Pictures and fine tune the Product Listing information for better comprehension. Also if you are using FileMaker 6 you can change the qty of products right from this screen. Contact Horizon via email if you are not running FileMaker 6 on all your computers. We would like everyone to run 6 instead of 5.5.

Enhancement – Proposal Preferences: New Tab Navigation System for easier navigation between preference screens for both Master and Proposal Preferences.

Enhancement – Proposal Pricing Screen: New Tab Navigation System for easier navigation between all Proposal Pricing screens and tax screens.

Fix – POS Quotation/Invoice/Work Order total labor time now correctly displays on screen and on reports.

Fix – Change Order Fees: If the user chooses not to add Project Fees to the CO, the Fees not are added, but the qty is blank, so that the user can easily add a fee if needed.

Version 3.0 – Build v230
Released: February 15, 2005

Enhancement – New Proposal Product Line List.

This new Product Line List is laid out for better comprehension and displays all product costs and discounts. More work will be done on this new screen to make it easier to change Qty and apply global discounts to specific groups of products.

Enhancement – New Proposal Direct Navigator Interface.
This new navigation system enables you to move quickly between Areas, Text, Products, Labor, Parts, Wire and Tasks.

Enhancement – POS Invoice Tax now separates the A & B tax rates out. This is important for our Canadian users.

Enhancement – Project/PO, WO, SI. Add the special print dialog pop up for Mac users to the Print buttons.

Fix – Change Order Pricing.
When a product is selected to be changed the price of the new product is now the same as the original product price. So if you apply global discounts to the proposal, these will be reflected in the Change Order. Of course you can manually change the price if you wish.

Fix – POS; Duplicating a Quotation now shows only the total amounts from the duplicated proposal not both the original and the duplicated quote.

Fix – When you go into a Completed project and then leave from the Proposal Detail by Area screen you go to the Proposal List and you should go to the Completed list.

Fix – Product Library/Utility/HSC; Emailing HSC utility now has their new address.

Fix – Areas & Products/Products portal now sorts the same as the Product list screen.

Version 3.0 – Build v210
Released: February 1, 2005

Enhancement – Proposal/Project/Archive/Completed Lists-Find Feature
You can now find these by using the Find Proposal (etc) button and find by Entity number, date range, client name, proposal title, salesman, project manager, project engineer and store location.

Enhancement – Proposal Discount now is the difference between list price and discounted sell price, instead of sell price and discounted sell price.

If a product has a list price, the discount will be the difference between the list price and the Sell price after using the Price Adjustor in the Proposal Pricing screen.

If a product does not have a list price, the discount will be the difference between the Sell price after using the Price Adjustor in the Proposal Pricing screen and the original Sell Price.

Enhancement – POS; Change Date Option.
 Add "change date" field to the Setup screen on all POS Invoices. Clearing this date field will revert the invoice back to the original invoice date. Now you can back date POS invoices without changing you computer date.

Fix – Proposal/Product List; Search and Replace product feature now returns you to the right screen if you Add a product in the Product Library and assign it a Product Group while your picking a new replacement product.

Fix – Project List/Change Orders now show up under the correct Project instead of at the bottom of the Project List.

Fix – Time Conversion Display in the Supplements/Wire Manager to display hours:minutes:seconds instead of minutes:seconds.

Fix – Proposal Labor Costing GP% was wrong when using the Degree of Difficulty to increase the labor time was changing the Labor Sell price but not the Labor Cost price. Now it does.

Fix – Product Sets Library/Access Rights: Deleting product sets and subsets now functions properly when the user access rights are checked.

Fix – Product Sets Library/Correct Ophaned Subsets indicator so that it indicates when a product that is in a Set has been deleted from the product library.

Fix – Converting a Proposal to a Project and not selecting the Auto Phase Dates but rather selecting the Manual Date option send you to the right screen but the wrong proposal. This works properly now.

Fix – Change Orders now pick up the Degree of Difficulty setting from the Master Project as the default.

Version 3.0 – Build v192
Released: January 21, 2005

Enhancement – Product Library/Cue Notes.

At the bottom of each product in the Product Library there is a new field that you can enter 4 lines of text into. If this field is populated a little ! icon will appear on the Product line list indicating that there are notes the user should view before he picks the product into a proposal. These notes can be used to indicate other products or parts that need to be included or things for the user to watch out for. These notes can be printed for all products using the new print button in the Product Library print menu. Please note this feature only works on FileMaker 6. Please contact Horizon if you need to upgrade to 6.

Enhancement – Product Library/Product Detail; Standards and Practices field. You can now enter text into fields for Products, Parts and Wire in the Prefs/Other/Other screen and this text will show up at the bottom of the Product Detail screen of each product in your Product Library. This can be helpful to provide users with additional global information about your products or setup.

Enhancement – Project/Work Orders/Install Task Report now includes the WO number and date for reference purposes.

Enhancement – Project/Work Orders
The Serial Number field on the WO detail screen now shows up on the printed WO invoice for reference.

Enhancement – Change Orders: Add product description, SKU number and Finish to the Finalized Change Order.

Fix – Upgrading sometime did not bring in the Default Labor Time for Parts and Wire in Preferences/Labor. This has been corrected. Please check your Default Labor Time for Parts and Wire and make sure there are times in these fields after you upgrade. Common times are 15 minutes for Parts, 30 seconds for Bulk Wire and 10 minutes for Pre Cut wire.

Fix – Change Orders: New change orders were not always bringing in the contact information from the original project. This has been corrected.

Fix – Converting Proposals into Projects was sometimes picking up the old Administrator rights instead of the new user access rights and not allowing Proposals to be converted into Projects. This has been corrected.

Fix – Product Sets Library: Duplicating Sets now duplicates all products in that set.

Fix – Proposal/Print Menu/Shop Reports. After previewing or printing the Staging Document report and leaving the Print Menu you were left in the proposal but not viewing the products unless you exited and re-entered the proposal.

Fix – Product Library/Delete all products.
You now can delete all products in the product library using the Utility screen without the risk of not being able to navigate back into the product library when no product records exist.

Fix – Proposal Picking Products/Access Denied problem
Under a certain set of circumstances an permission denied message would pop up when picking products into a proposal. The products would still get picked but the message popped up and this has been corrected.

Fix – Proposal Show Product Line Listing:
Remove the "-" at the end of the product listing regardless of the Show Product Listing setting.

Version 3.0 – Build v174
Released: January 11, 2005

Fix – Proposal/Parts and Wire Labor
When picking products classified as a part or wire into a proposal the labor assigned to these now comes into the proposal as labor supplements.

Fix – Preferences/Labor Supplement screen
Correct the portal refreshing so that changing labor time updates properly when cycling through the product groups.

Fix – Product Set Library: Deleting a Set now returns you to the Set List instead of a screen with a blank Subset portal.

Fix – Project Payment Screen: Creating an invoice from one of the payment amounts and then deleting that invoice now returns you to the Payment screen instead of the wrong screen.

Version 3.0 – Build v160
Released: January 4, 2005

Enhancement – Proposal Fees Speed improvement.
Remove the redundant posting routines so that entering the Fees module is faster.

Enhancement – Project Work Order/Installation Tasks.
Add a button in the WO to print all of the Installation Task Supplements associated with that Work Order.

Enhancement – Product Library Stock List Report.
Create a new report for the Product Stocking List screen.

Enhancement – Master and Proposal Prefs
Rearrange header icons and move Print Options for better clarity.

Fix – Proposal Print Menu/Labor Item Detail Report.
This report (which previewed properly) now prints correctly.

Fix – Proposal Overviews
New Overviews added to a specific proposal were showing up in the Text Library
and now they are hidden as they should be.

Fix – Product Library/Import Products Routine.
Remove the 2nd import field map from ProdUpt to Products.

Fix – Master Project Payment Screen.
Remove the "Records not Found" message that shows when entering this
module.

Fix – Proposal Print Menu/Print Options/Product Listing
Correct the C2 Make – Description display and remove the "-" at the end of the
product display on all Proposal reports.