SmartPartner Software

Automated Proposal & Project Management System

2006 Revisions

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

We encourage you to upgrade regularly to take advantage of the new features and to ensure trouble free operations. Technical Support for SCPS is much more efficient when all users are on the same software version.

Feel free to communicate your ideas and suggestions to Horizon Software. Please use the Send Bug Notice button on the Prefs/Horizon screen or by clicking on the Horizon logo on the main logo screen.

Call Horizon if you need assistance with upgrading or implementing SCPS.

Regards,
Jim Engandela
President/Developer

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Upgrading to the latest version incorporates all past enhancements and fixes, so it is only necessary to upgrade to the latest version.

Upgrading brings 100% of your data forward to the new version.

Download this latest SCPS Upgrade from the SCPS/Preferences/Horizon screen.

SmartPartner Training:
If you need training on new enhancements just give Sandy a call and book a time with Jim or Orv. SmartPartners receive a 25% discount off Horizon's normal support rates.

Download the Upgrade Help Guide
From the SCPS/Prefs/Horizon screen or directly from this link.
http://www.horizon-software.com/download/SCPS_Upgrade_Help_Guide.pdf

View past SCPS Revision Documents
http://www.horizon-software.com/download/SCPSrevisions_2005.pdf
http://www.horizon-software.com/download/SCPSrevisions_2004.pdf
http://www.horizon-software.com/download/SCPSrevisions_2003.pdf

SCPS Version 5.1
Released: 11/29/2006

Enhancement – Completed Projects List: Access to Change Orders
You can now access the Change Orders on Completed Projects directly from the Completed Project List, by clicking on the CO arrow icon, the same way you do on the Project list.

Enhancement – Contact and Proposal Detail: AutoMap Quest
Added a button on the Contact Detail and Proposal Detail screens called "Get Directions" that automatically queries Map Quest and returns the directions from the Shop Location Address and the Clients Address. These directions and maps can be copied and pasted into SCPS. The Shop Location is determined by the User Login and there is an option to select the clients Address 1 or Address 2.

Enhancement – Completed Project/Utility: Competed Date
Add the ability to change the Completed Project Date in the Utility screen of a Completed Project.

Enhancement – Change Orders/Utility: Printer Setup

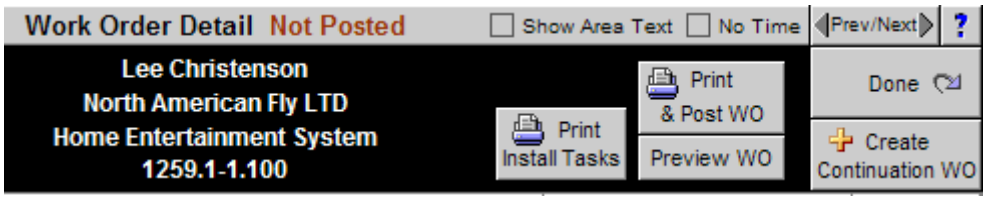
Add a Printer Setup button to the Pending and Final Change Order screens and a Printer display that enables you to change Printers prior to printing a CO.

Enhancement – Master Tracker: Change Order Install Labor
Tracker now shows Change Order Install Labor and Finds Project Install and CO Install Milestones when you click on the Projects button and just CO Milestones when you click on the Change Order button.

Enhancement – Product Library: Add product with New Product flag
When adding a new product to the Library the "New Product Flag" is automatically checked.

Enhancement – Product Library/Utility/Utility 1: Convert Text
This utility will now change any 2 or 2 character Make to Caps or Capitalize the 1st character of each word in the Make field. This applies to RCMS users as well after they import their data into SCPS.

Enhancement – Project/Work Orders: Do not Show Install Time Option
When staging a Work Order you now have the option to not show Install Time on the Work Order.



Fix – Master Project/Discipline, Area, Phase Subtotal Screen totals
Fix the Equipment and GP% totals on these screens so that the Master Project Grand total fields do not show on the Discipline, Areas or Phases sections and show a double image.

Fix – Proposal/Payment screen: Trap Manual Payment Discrepancy
When changing the Payment plan type to Manual Payment amounts a warning message will now appear when you exit the Payment screen if the total payment amounts do not equal the Proposal total.

Fix – Master Project/Pricing
Fix Tax on the Master Project so that it correctly adds the Original Project Tax plus the sum of the Change Order Tax.

Fix – Contacts/Vendor: Validation
Remove the vendor validation notice as it is no longer necessary.

Fix – Reports File 5.1
Fix the display of product price on the Areas & Products Report
Extend the header on both Areas & Products Reports
Align the Labor Detail header

Fix – RCMS Chelsea: Product Import Map
Change this product import map so that it puts the list price into the sell price if the sell price is empty.

Fix – Proposal/Print Menu/Areas & Products Report: List Prices
When showing the discount on this report the List Price was incorrect.

SCPS Version 5.0
Released: 10/26/2006

Enhancement – QuickBooks Integration: Sales Invoices
1. Add functionality for compliance with Quickbooks 2006.
2. Add Tax automatically to the Quickbooks Invoice.
3. Add Quickbooks Customer Query functionality from within SCPS.
4. Add the ability to automatically add a new customer into QB from SCPS.

Enhancement – QuickBooks Integration: Project Purchase Orders
You now can automatically **add** Purchase Orders and **receive** products from SCPS into QuickBooks. Please check the "Enable PO to QB functionality" box in Prefs/Bookkeeping/Quickbooks.

Enhancement – RCMS Integration: Disable PO and Invoicing
An option for RCMS users to disable Project PO and Invoicing functions, because those are done in the RCMS bookkeeping system. This check box is in Master Prefs/Bookkeeping/RCMS

Enhancement – RCMS Integration: Enable Project Pump up into RCMS
Contact Horizon to enable this feature online.

Enhancement – Proposal/Print Menu/Custom Layouts: Version
Add the version number of the Custom Layouts module so that it displays on the bottom of the print menu if the Custom Layouts module is used.

Enhancement – Proposal/Area & Products/Alt View: Screen
There is an Alt View button on the Areas & Products screen that will show the products in each area sorted by Make and Model and not by Discipline. It also shows each Area, Product and Supplement on one screen.

Enhancement – Proposal/Fees: Fees directed to Parts or Labor
Fees directed to Parts or Labor subtotals now do not show up on the Proposal Fees report, but are included in the Parts or Labor subtotal.

Enhancement – Project Manager/History of Products Sold: Add client
Add the Client and Company name to each product in the History along with the project number.

Enhancement – Master Project & Final CO/Payments: Add Phase 2 &3
Add Phase 2 & 3 Payments and totals so that Project and Final CO payment plans replicate the Proposal and Pending CO's.

Enhancement – Master Projects with CO's navigation feature
When leaving a Master Project or clicking on the Change Order button within a Change Order, you now have the option to View all of the existing Change Orders.

Enhancement – Project/Utility: Project Completion Date
A new option when you convert a Project to a Completed Project, enables you to manually enter a completion date instead of having SCPS use today's date.

Enhancement – Project/Supplements/ Wire Manager: Print Wire Labels
The Wire Manager screen has been replicated so that the same screen appears in a Proposal and in a Project. The print Wire Labels button now functions and creates a source and end label for each piece of wire. We recommend that you use Avery 5520 Weather Proof labels.

Enhancement – Project List/CO List: CO Payments Made & Balance Due
This screen now shows the Payments Made and the Balance Due on each Change Order.

Enhancement – Product Library/Product Detail/Wire: No Labor
If you check the "No Labor" box on a wire, then the labor will not show up on the Product Detail screen in the Product Library, just like it behaves when you add that wire into a Proposal.

Enhancement – Product Library: Find New Products
There is now a New Product Flag that can be checked on the Product Detail screen. Then you can use the Find Products/More Criteria screen to check the

New Product Flag box and it will find all of the Products that have been flagged. This comes in handy if you want to add a new product for a proposal and then go back and flush out the product info later.

Enhancement – Product Library/Inventory Control: Zereo Qty on Hand
This feature is located in Master Prefs/Other/Product 2 screen. It will zero the Qty on Hand. You can now set all of the product quantities in the Product Library Inventory Control module to 0 to have a clean starting point.

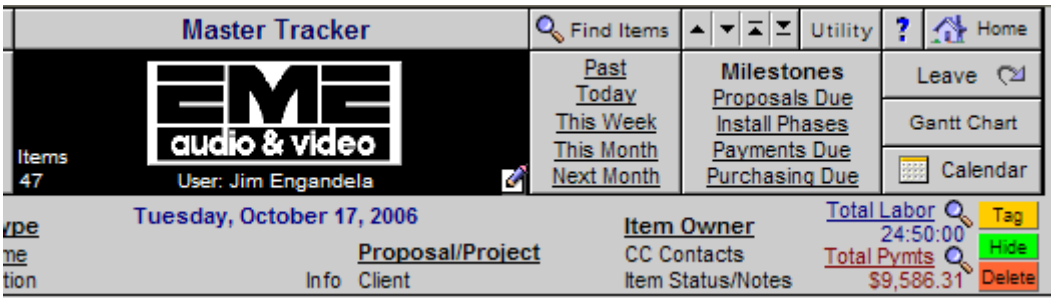
Enhancement – Contacts/Print Menu/Envelopes: Move label
Move label another ½ inch to the right.

Enhancement – Contact/Utility: Set Blank Contact Keys
This utility will set a Key value to all contacts that do not have one. Not having a contact key, can occur during an import of contacts from another database and will cause contacts to not function properly. If you can't pick a contact for a Proposal or POS then you might want to run this utility.

Enhancement – POS/Service Order: Salesman's Name
The pop list for the Salesman's name now comes from User List

Enhancement – Master Tracker/Calendar: Show Client Last Name
Master Prefs/Tracker/Calendar Prefs: has a setting to enable you to show the Client Last name or the Task ID on each item in the Calendar. Default will show the client last name.

Enhancement – Master Tracker/Milestones: Labor & Payments by Day
A view button to the right of the Total Labor and Total Pymts labels will show you the total Install labor time and payment amounts for each day.



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Confidential Report
Install Labor Milestones

187:42:30

Done	Due Date / Task Owner	Type / Name	Phase	Assigned To / Client/Company	Labor Hours
☐	**Oct 12, 2006** Jim Engandela	**Project Milestone - Install** Install Hours Phase 1 - Prewire - Installation	1	1268.1-1.100 Dana Berkow	28:57:30
☐	**Oct 12, 2006** Jim Engandela	**Project Milestone - Install** Install Hours Phase 1 - Prewire - Installation	1	1284.1-1.100 John & Mary Smith	29:55:00
☐	**Oct 12, 2006** Jim Engandela	**Project Milestone - Install** Install Hours Phase 1 - Prewire - Installation	1	1275.1-1.100 Dennis Goss	6:45:00
☐	**Oct 12, 2006** Jim Engandela	**Project Milestone - Install** Install Hours Phase 1 - Prewire - Installation	1	1285.1-1.100 Mike & Jessica Potter	6:45:00
☐	**Oct 12, 2006** Jim Engandela	**Project Milestone - Install** Install Hours Phase 1 - Prewire - Installation	1	1286.1-1.100 Gary Hagen	3:00:00
				Total for Oct 12, 2006	**75:22:30**

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Confidential Report
Payment Milestones

$193,513.92

Done	Due Date / Task Owner	Type / Name	Phase	Assigned To / Client/Company	Payment Amount
☐	**Oct 2, 2006** Sandy Engandela	**Project Milestone - Payment** Payment Phase 1 - Prewire - Payment	1	1268.1-1.100 Dana Berkow	$21,167.93
☐	**Oct 2, 2006** Sandy Engandela	**Project Milestone - Payment** Payment Phase 1 - Prewire - Payment	1	1284.1-1.100 John & Mary Smith	$21,167.93
☐	**Oct 2, 2006** Sandy Engandela	**Project Milestone - Payment** Payment Phase 1 - Prewire - Payment	1	1275.1-1.100 Dennis Goss	$7,675.07
☐	**Oct 2, 2006** Sandy Engandela	**Project Milestone - Payment** Payment Phase 1 - Prewire - Payment	1	1285.1-1.100 Mike & Jessica Potter	$9,194.00
☐	**Oct 2, 2006** Sandy Engandela	**Project Milestone - Payment** Payment Phase 1 - Prewire - Payment	1	1286.1-1.100 Gary Hagen	$5,299.70
				Total for Oct 2, 2006	**$64,504.64**

Enhancement – Master Preferences/Users: Validate Last Name

When creating users the Last Name field is now required to be filled out, so that the users name will show up in on the Log in screen.

Fix – SCPS Subscription Renew Later

When you get the screen notice to renew your subscription and you choose "Renew Later" you will now be sent to the User Login screen so that you can log in again.

Fix – Master Tracker: Milestone emailing of cc users
Master Tracker Milestones like Install Phases and Payments were not being emailed to the cc addresses assigned to them in Prefs/Master Tracker. This has been corrected, but will only occur on Proposals and Project created after this upgrade.

Fix – Proposal/Pricing: Print Pricing Report
This button now only prints a single copy of the Pricing screen instead of a copy for each record in the proposal.

Fix – Product Library: RCMS Hide-Delete routine
If the Do not delete check box is checked then that product will not be deleted in the RCMS Hide-Delete routine.

Fix – Proposal/Project Detail screen: Resetting Install Type
The reset button now picks up the Master Prefs Install phase notes and phase percentage when you change the Install Type and click the reset button.

Fix – Project/Pending CO: Clear Payments Made
Pending CO's were picking up the payments made on the Master Project. This has been corrected.

Fix – Master Tracker: Add User ID to User Tasks and Appointments
Tasks and Appointments created for Users now are stamped with the user ID and the Name of the User shows when viewing the Task Detail.

Fix – Follow-Up Module: Dates
Increase the size of the date stamp fields to display the entire date. Stamp the correct date on the Presidents and Manager letters.

Fix – Project/Change Orders: Subtotal text size
Make all subtotals and text 10 point text for uniformity.

Fix – Proposal/Duplicate Area: Parts & Wire Phases
When duplicating an area in a proposal the parts and wire phases now remain the same as the original area.

Fix – POS/Work Order: Add Balance due after Payment field
The Balance Due after payment amounts now shows on the printed Work Order.

Fix – Proposal/Print Menu/Shop: Print Tax Summary
This report now prints properly.

Fix – Project/Tracker: Entity Lock

When leaving a Project from the Project Tracker to go to the Tracker the Entity Lock is now unlocked so that you can return to the Project without being locked out.

Fix – Proposal/Area & Products Report & CO's: Extended Sell Price
Replace incorrect Extended Sell Price with correct field.

Fix – Proposal/Product Detail/Labor Detail
Replace incorrect total Sell Ext/DOD with correct field.

Phase 1 Prewire Labor for 5 pr Linn : Katan									
Labor Type Phase 1 DOD: 10%	Labor Cost	Labor Sell	Time Unit	Time Unit w/DOD	Time Ext w/DOD	Cost Unit w/DOD	Cost Ext w/DOD	Sell Unit w/DOD	Sell Ext w/DOD
1 - Installation	$30.00	$60.00	0:00:00	0:00:00	0:00:00				
5 - Wire Labor - Bulk	$35.00	$60.00	0:37:30	0:41:15	3:26:15	$24.06	$120.31	$41.25	$206.25
Phase 1 Prewire Totals:			0:37:30	0:41:15	3:26:15	$24.06	$120.31	$41.25	$206.25

SCPS Version 4.17
Released: 9/6/2006

Enhancement – Contacts/Utility: Print Updated Field Map
A new print button has been added that will allow users to print the SCPS Contact Field Mapping names for importing data into and out of the Contact file to Excel or other programs.

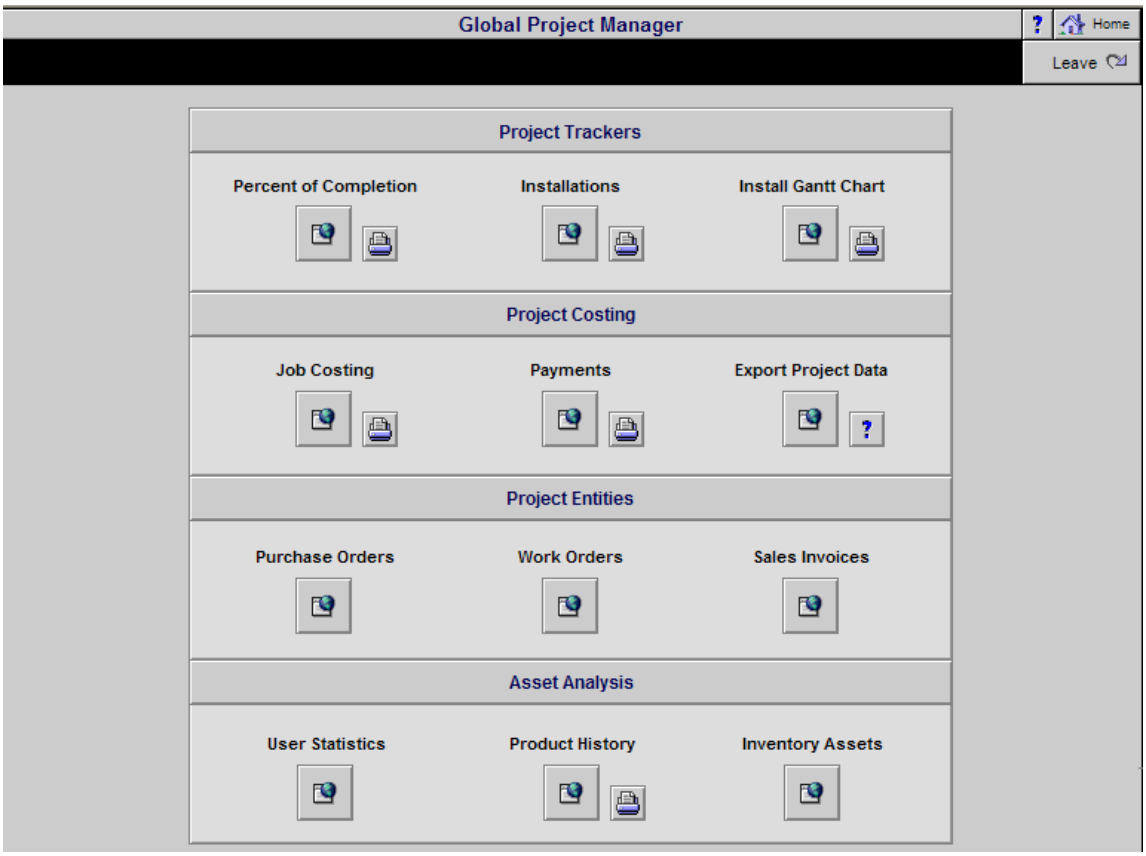
Enhancement – Proposal/Fees: Labor by Phase
Users can now create a Fee based on either the Total Labor or by Phases 1,2, or 3 Labor, instead of only basing it on Total Labor as in the past.

Enhancement – Proposal/Printing Prefs: Product Listing Format
Product Listings have been reorganized in an improved manner and work without the ID number associated with them. The last ":" separator at the end of the "Make : Model : SKU : Description : Finish" no longer displays. If there is no Make or Model showing in the product listing, then the listing will start with a ":".

Enhancement – Proposal/Print Menu: Areas & Products Report with Grand Totals
A new Areas & Products report has been added that includes the Proposal Grand Totals. This new report is available for regular and custom proposals.

Enhancement – Logo Screen/Project Manager: New screen layout

This new Global Project Manager screen organizes Mgmt utilities into Project Trackers, Project Costing, Project Entities and Asset Analysis for easy access. These Mgmt screens draw data from the entire SCPS system, so many of these Mgmt utilities have a print button next to them, so that a report can be printed without having to going into the mgmt screen.



Enhancement – Project Manager / Percentage of Completion

This new screen summarizes the Job Cost, Install and Payment screens into one easy to view screen. From here users will have an easily accessible view of the Products, Labor, Invoices and Payments of every Project and a percentage of completion factors as well as the percentage of remaining values for the entities.

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

Find Projects | **Project Manager - Percent of Completion** | Print | ? | Home

Administrator | Manager | User

EME audio & video

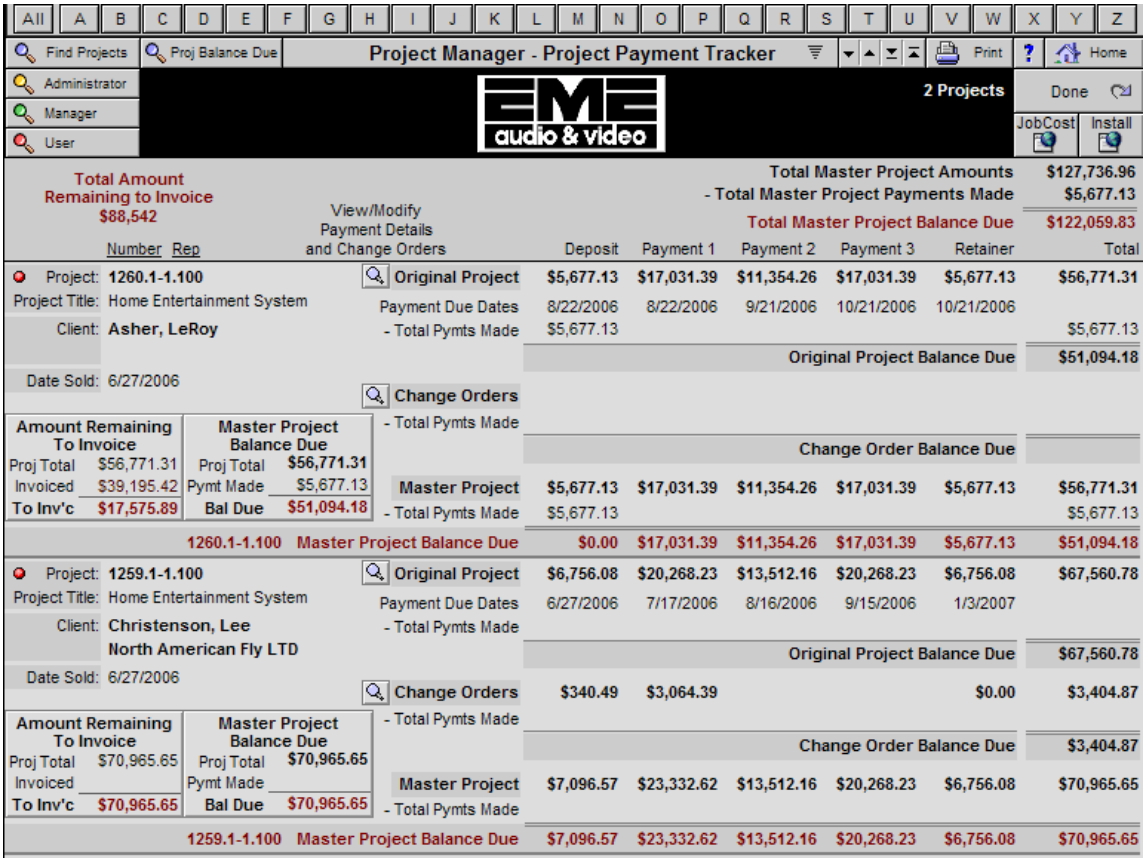
10 Projects | Done | Gant Chart

Total Master Project Amount | Total Amount
Total Average GP% | Avg Gp%
Balance Due | Total Due

Sold Date	Project	% of Completion	% Remaining	Original Project	Finalized CO's	Master Project w/CO's	Profit	GP%
View	Labor	0.0%	100.0%	Products 1	Project Time 1:00	Proj Total $1,306.30	Proj Total $1,306.30	
	Invoiced	0.0%	100.0%	Parts	Installed	Invoiced	Pymt Made	
	Payments	0.0%	100.0%	Wire	Labor Left 1:00	To Inv'c $1,306.30	Bal Due $1,306.30	
Client:	1261.1-1.100			$11,515.09	$3,597.55	$15,112.64	$5,742.82	40.0%
Project:	Roberts, Joel			Products To Order Rec'v Install	Labor Time Remaining	Amount to Invoice	Master Project Balance Due	
8/14/2006								
View	Labor	0.0%	100.0%	Products 5	Project Time 6:30	Proj Total $15,112.64	Proj Total $15,112.64	
	Invoiced	0.0%	100.0%	Parts	Installed	Invoiced	Pymt Made	
	Payments	0.0%	100.0%	Wire 153	Labor Left 6:30	To Inv'c $15,112.64	Bal Due $15,112.64	
Client:	1260.1-1.100			$56,771.31		$56,771.31	$16,168.53	30.0%
Project:	Asher, LeRoy			Products To Order Rec'v Install	Labor Time Remaining	Amount to Invoice	Master Project Balance Due	
6/27/2006								
View	Labor	4.9%	95.1%	Products 50	Project Time 61:27	Proj Total $56,771.31	Proj Total $56,771.31	
	Invoiced	69.0%	31.0%	Parts 5	Installed 3:00	Invoiced $39,195.42	Pymt Made $5,677.13	
	Payments	10.0%	90.0%	Wire 2,040	Labor Left 58:27	To Inv'c $17,575.89	Bal Due $51,094.18	

Enhancement – Project Manager / Payment Tracker

A “Master Project Balance Due” indicator has been added to provide for easy viewing of the amounts a client may owe.



Enhancement – Proposal / Project: Optimized “Find Feature”

When using the Find Proposal/Project feature, you now have the option to choose to manually enter your Find Criteria or having the POP-UP value lists Auto-Set so that you can pick Find Criteria from the list. If you have a large number of Proposals/Projects in your database, it is faster to manually enter the customer name (or part of the name) or other Find Criteria.

Enhancement – Proposal Areas & Products screen: Alt View

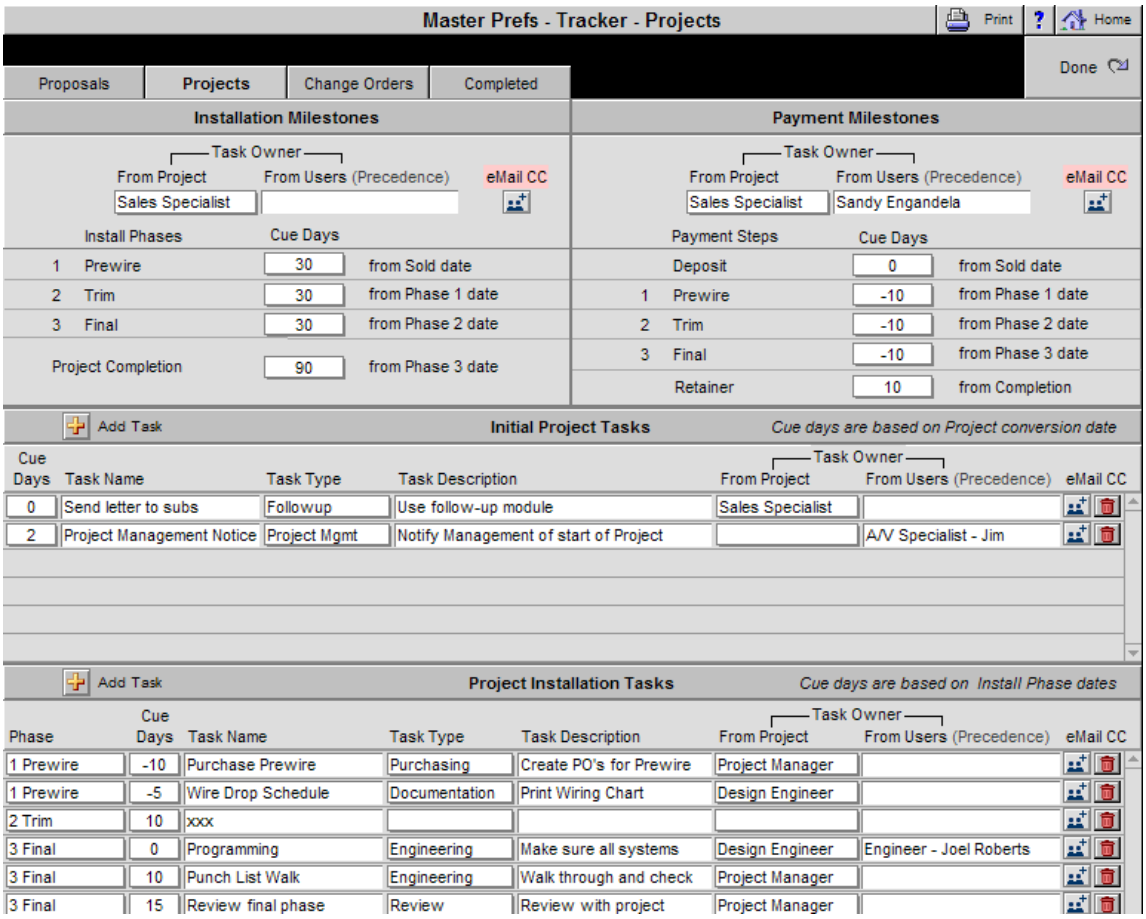
From the Proposal Area/Product, Parts Supplements and Wire Supplements screens you can now view all of the Areas, Products within an area, along with the Parts & Wire Supplements associated with those products. This can all be viewed on one extra large screen for easy reference. To engage this feature, simply click on the “Alt Area View” button found in the upper left-hand corner of the Proposal-Areas and Products screen.

Enhancement – Proposal Supplements Label

The “Part Supplement” and “Wire Supplement” in an Associated Product Supplement record of a Wire or Part Supplement is now displayed. In the past a blank entry was displayed. This makes it easer to see if the Part or Wire Supplement was added to the Proposal as a Pure Supplement as opposed to one that was added along with a Product.

Enhancement – Master Prefs/Tracker GUI

This interface screens have been redesigned and consolidated on all Tracker and Utility screens for better ease of use and comprehension. Proposal : Projects : Change Orders : Completed



Enhancement – Master Tracker: Change Orders

Add Change Orders to the Master Tracker, so that Finalized CO tasks and milestones are populated into the Master Tracker just like Proposal, Project and Completed tasks are.

Enhancement – Master Tracker: Entry Speed Increase into the Master Tracker

Install and Payment amounts are updated and posted only on current Tracker records instead of on all historical records to speed up the process and entry into the Tracker.

Enhancement – Master Tracker: Auto Set "Hide Tasks Prior to Today's Date"

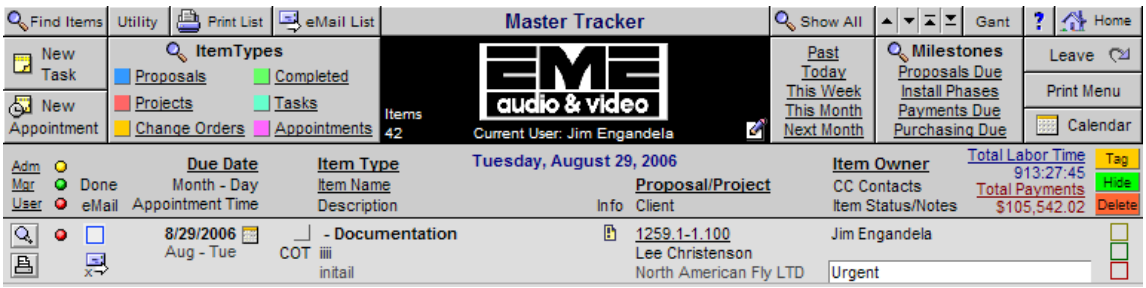
Users can now elect to automatically enable the feature that Hides all Tasks and Milestones prior to the current date when entering the Master Tracker. Tasks prior to the current date can be shown using the Utility button in the Master Tracker or via the “Find Items” feature.

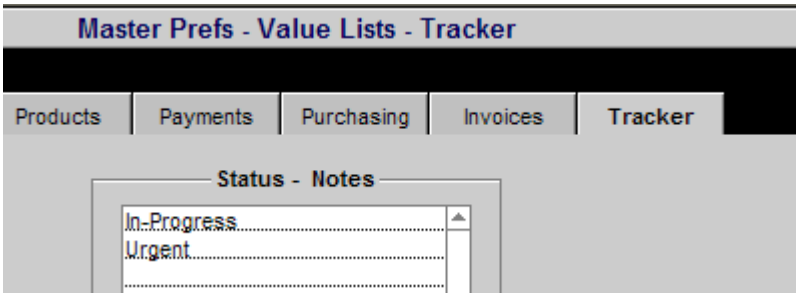
Enhancement – Master Tracker/Add Date to Done check box
When a user checks the "Done" box on a Task, the system now stamps and records the Done Date for future reference.

Enhancement – Master Tracker/Utility: Delete all Tasks & Milestone
A new button in the Utility screen has been added that now will permanently delete all Tracker Tasks & Milestones for all users. **Caution:** This act cannot be undone and will delete these for **all** users. Access rights to the Utility screen can be set in Master Preferences for each user.

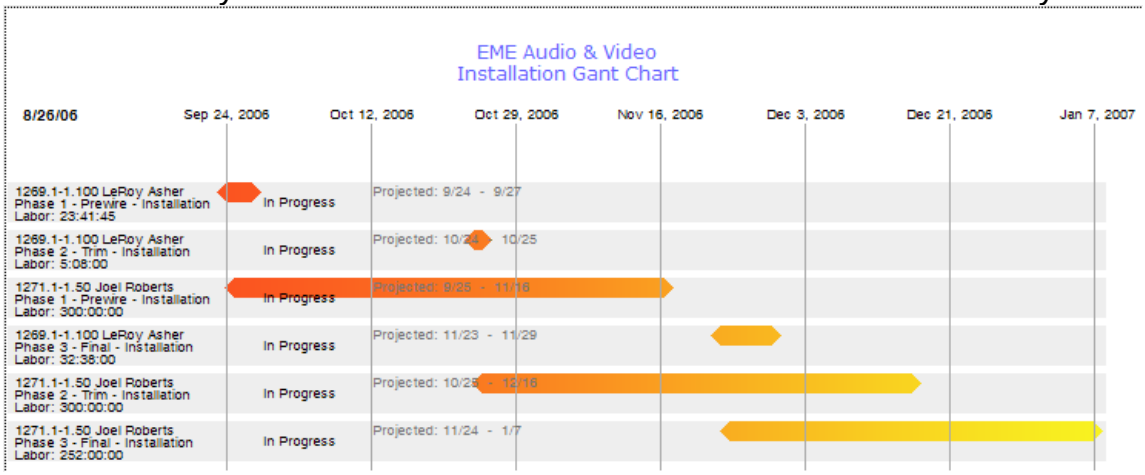
Enhancement – Master Tracker: Past Due Button
A "Past Due" button has been added to allow users to easily find all Tasks and Milestones that have due dates prior to the current date and have not been checked off as being "done".

Enhancement – Master Tracker: Notes & Status field
Access has now been provided to the Notes and Status field on each Milestone and Task for entering notes and status. A pop-up list that comes from the Master Prefs/Lists/Tracker screen can also be used to quickly enter status levels.





Enhancement – Master Tracker: Add Installation Gantt Chart
Users can now view all of the Installation Milestone for all Projects in a Gantt view that shows the Project info, the number of hours associated with the Phase, and a graphic bar representing the starting and ending date of the Install Milestone. The number of man hours per day and the number of weekend days can be manually set to add to the bar in Master Prefs/Tracker/Gantt Utility.



Enhancement – Proposal/Products: Add Product Class to Products
Users can now Find and/or Sort Products by Product Class. (Product, Part, Wire)

Enhancement - Project/Work Orders & Sales Invoice Phases
Users can now change Phase numbers on Products in a Project Work Order and Sales Invoice.

Enhancement – Product Library/Product Detail: Do not Hide Option
Users can check the "Do not Hide" option on this screen so that specific product cannot be hidden. This works for all users. RCMS users should note that if this checkbox is selected, then discontinued products that normally would be hidden during the product importing routine will now **not be hidden**.

Enhancement – Product Library/Product Detail: Separate Pix & PDF's
There are now two distinct Product Detail Tab screens to accommodate Pictures (PIX) and PDF files.

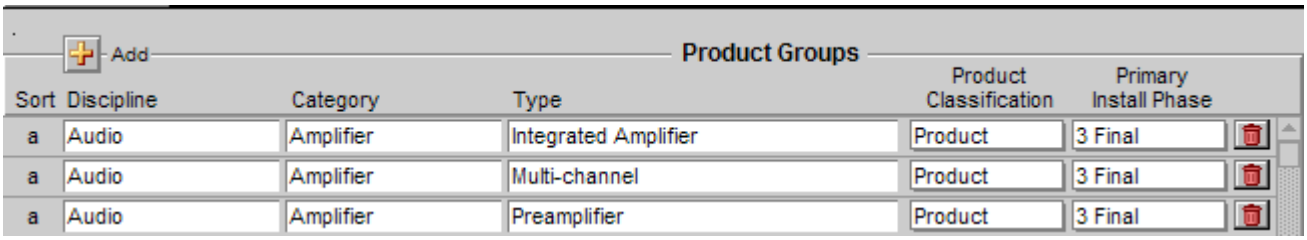
Enhancement – Change Order/Payments: Add Payments 2 & 3
Change Order payment plans can now be configured to match the Proposal Payment plans.

Enhancement – Change Order/Install Phases: Add Phases 2 & 3
Change Order Installation Types can now be configured to match the Project Installation Types instead of just 1 installation phase.

Enhancement – Main Logo Screen: Improved Speed
All modules are now placed into the “Fast Open” screen when navigating to the Main Logo screen so that this screen refreshes faster.

Enhancement – Project/Purchase Orders: Hide/Show Purchase Order Prices
Each Purchase Order in a Project can now be set to “Show” or “Hide” the Product prices on that order. The default is to show the prices and a button at the upper left part of the Purchase Order screen enables users to show or hide the prices.

Enhancement – Master Preferences/Groups: Product Classification
Users can now assign the Product Classification to the Product Groups. (Product Classification = (Product, Part, Bulk Wire, Pre-Cut Wire). If a user elects to assign a Group to a Product in the Product Library, the Classification will be automatically assigned to the Product. The Classification can be overridden on any Product if desired.



Enhancement – Master Preferences: Auto Enter Placement when Adding Groups
If any Placement Codes have been assigned to your Groups, then these default codes will be automatically assigned to newly created Groups.

Enhancement – Master Prefs & Product Library: Product Groups: Use Last Selection
Clicking on the “Use Last Selection” button will not only bring users to the last Product Group they were working on, it will also engage that Group, making it faster to assign and/or change Groups.

Group Navigator
Up
First
Down
Last
First Group 1
Go to Last Selection
Use Last Selection

Enhancement – Online Help Utility: Live Help Access
Users can now click on the Horizon Logo on the main screen or the Horizon tab in Master Preferences and, after calling Horizon to get your access number, can enter that number and click on the Live Help button to go on line with Horizon.

Enhancement – Project/Purchase Order: Improved Creation Functionality
By not including order quantities next to items that do not have an automatic Vendor assignment, users can still proceed with creating Purchase Orders for the balance of items that do have Vendors assigned. In the past, users were forced to assign vendors to ALL Products before any Purchase Orders could be created. This new approach speeds up the creation and does not stop you from creating Purchase Orders even if other products don't have Vendors assigned.

Enhancement – Project/Print Menu/Shop: Master Product Delivery Form
This new report shows all of the Products, Parts and Wire in the Project with Quantity, but no prices or Labor. A "Customer Signature" line is included on the report that enables it to be signed and dated upon delivery.

Enhancement – Contacts/Utility: Separate Utility screens
There are now three separate Utility screens with a tab interface: Contact Utility; Import Contacts; and Export Contacts. This replaces the former single screen.

Enhancement – Project/Invoices: Reference number
A reference number has now been added to the bottom of the printed Invoice that contains the Invoice number and the Project number that it belongs to.

Enhancement – Flanner's: Proposal/Dealer Payment Plans
Both New and Retro Construction Payment plans now round the Retainer/Hold Back amount down to the nearest $100, instead of up.

Enhancement – RCMS Users: Product Library Import from RCMS: Delete/Hide Dead Products
When Importing Products from the RCMS database into the SCPS Product Library, all Products in the SCPS Product Library that are not in the RCMS Import will be Deleted from the SCPS Product Library unless they are in a Proposal/Project/Completed Project. In that case, they will simply be Hidden in the SCPS Product Library. There is a new flag in Master Preferences/Bookkeeping/RCMS to turn this feature on or off if you wish to retain all the old unused products. However, it is recommended that you set this to "Yes Delete/Hide dead products". If this flag is set to Yes or is Blank, then the Delete/Hide feature will be engaged.

Fix – Proposal/Print Communication Log
Printing the Communication Log now generates the proper log entries.

Fix – Proposal/Product Library/Do Not Delete
If the "Do not Delete" box is checked in the Product Detail screen, then the Product can no longer be deleted. It will instead be hidden.

Fix – Proposal/Print Options: Refresh Show prices settings
When entering the Proposal Print Menu, the "Show Prices" setting is now reset to prevent the prices on the Area & Products report from being blank.

Enhancement – Master Prefs/Users: Add Project Engineer Assignment
Users can now elect to assign a Project Engineer to a User. This in turn will automatically assign that engineer to new proposals for that User. This can of course be overridden within a specific Proposal.

Fix – Master Preferences/Groups: Change Groups with products
When deleting a Product Group that has Products assigned to it, users are now provided with the option of changing the Group on those Products before deleting that Group. After doing this, the user will be returned to the Master Preferences/Group screen instead of the Product Library Utility screen.

Fix – POS: Invoices: "Description" Typo Correction
"Description" is now spelled correctly

Fix – Proposal/Related Contacts: Email Button
The email button on each Related Contact has been fixed so that it now picks up the correct contact email address.

Fix – Proposal/Discipline and Phase Subtotal GP%
The calculation of Gross Profit % on the Subtotal screen for Disciplines and Phases has been repaired. Grand total GP% was correct but subtotal GP% for Disciplines and Phases have now been corrected.

Fix – Proposal/Archive: Print Archive Report
This report was not functioning properly and now accurately will print a list of all the Archived Proposals.

Fix – Project/Print Menu/Shop: Summary Staging Document
Products that have a "zero" quantity, from positive and negative change orders, are now excluded from this report.

Fix – Proposal/Area & Products Report: Pricing Print Options

The options calculations in this area have been refined for more reliable display of Extended Price based on options settings. The Ext Price Header label was also repaired so that it accurately reflects the Options setting.

Fix – Proposal/Area & Products Report & CO's: Extended Sell Price
When two or more "like kind" products are in the same area, they are combined in these Reports. The quantity was displaying the correct total but the extended sell price was not. These have all been changed to summary fields and now show the correct amounts. This has been changed in the custom reports file as well.

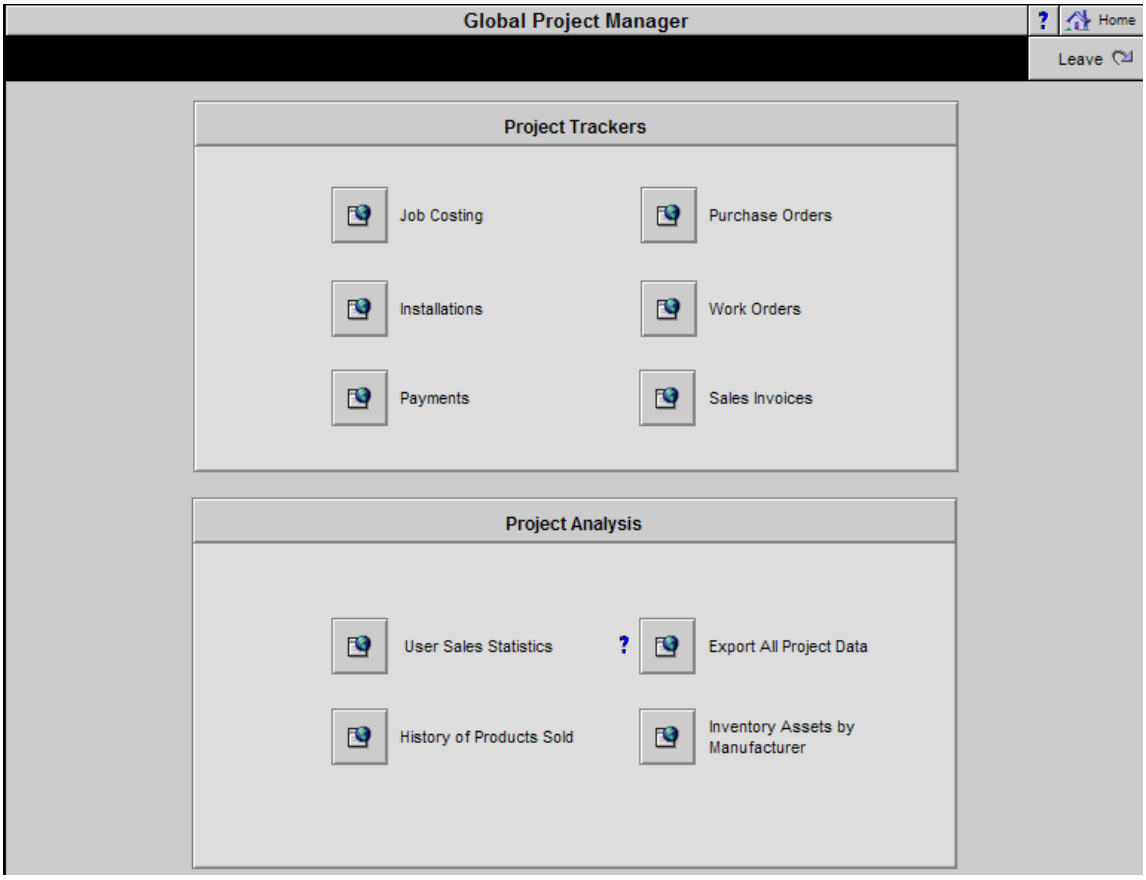
Fix – Proposal/Discipline and Area, Grand Total Screens and Reports: Show Fees Total with and with Fees Tax
The Fees Total, with and without Fees Tax is now shown on the Discipline and Area, Grand Total screens and both the Main and Custom Proposal Reports. Since Fees are global to a proposal and not assigned to a Discipline or Area, it is necessary to show the Fees totals. Fees are assigned a Phase, so they are included automatically in the Phase, Grand Total screens and Reports.

Fix – Proposal/Print Menu/Contract: Discount amounts not correct
In some instances, when displaying a discount on the contract, SCPS was showing the last discount amount (stored in memory) from the last proposal and not the current one. This has been corrected.

Fix – Master Tracker/Auto Email: Send emails to correct task owners
In some instances, Task emails were addressed to the Project Salesman and not the Task Owner and they are not always the same. This has been corrected.

SCPS Version 4.16
Released: 7/19/2006

Enhancement-Main Logo Screen/Project Manager
6 New Global Project Management Modules
-Project Job Costing
-Project Installations
-Project Payments (enhanced)
-Purchase Orders
-Work Orders
-Sales Invoices
-History of Project Products
-Inventory Assets by Vendor


Global Project Manager
Home
Leave
Project Trackers
Job Costing
Purchase Orders
Installations
Work Orders
Payments
Sales Invoices
Project Analysis
User Sales Statistics
Export All Project Data
History of Products Sold
Inventory Assets by Manufacturer

Enhancement-Project Manager: Project Job Costing

-Total Project Amounts and GP%

-View Projects directly from this screen

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

Find Projects | Administrator | Manager | User

Project Manager - Project Job Costing | Print | ? | Home

EME audio & video

2 Projects | Done | JobCost | Install | Pymts

Total Master Project Amounts $127,736.96

Average Total GP% of all Master Projects 35.2%

Number Rep	View this Project		Original Project	All Finalized Master Project CO's	Sell with CO's	GP%	Cost	Profit
Project: 1260.1-1.100		Equipment	$39,056.90		**$39,056.90**	24.2%	$29,591.40	$9,465.50
Project Title: Home Entertainment System		Installation	$3,875.67		**$3,875.67**	46.8%	$2,061.81	$1,813.85
Client: **Asher, LeRoy**		Misc. Parts	$926.67		**$926.67**	40.4%	$552.00	$374.67
		Wire & Cable	$6,937.25		**$6,937.25**	42.1%	$4,013.25	$2,924.00
Date Sold: 6/27/2006		Additional Fees	$3,181.02		**$3,181.02**	50.0%	$1,590.51	$1,590.51
Project Job Costing Reports Menu		**Total**	**$53,977.50**		**$53,977.50**	**30.0%**	$37,808.97	$16,168.53
		Tax	$2,793.81		$2,793.81			
		Grand Total	**$56,771.31**		**$56,771.31**			
Project: 1259.1-1.100		Equipment	$48,821.13	$2,349.99	**$51,171.12**	39.0%	$31,221.40	$19,949.72
Project Title: Home Entertainment System		Installation	$3,875.67	$319.00	**$4,194.67**	46.9%	$2,226.13	$1,968.54
Client: **Christenson, Lee**		Misc. Parts	$926.67	$95.00	**$1,021.67**	40.4%	$609.00	$412.67
North American Fly LTD		Wire & Cable	$6,937.25	$318.75	**$7,256.00**	42.1%	$4,204.50	$3,051.50
Date Sold: 6/27/2006		Additional Fees	$3,669.23	$152.58	**$3,821.81**	50.0%	$1,910.90	$1,910.90
Project Job Costing Reports Menu		**Total**	**$64,229.94**	**$3,235.32**	**$67,465.26**	**40.5%**	$40,171.93	$27,293.33
		Tax	$3,330.84	$169.55	$3,500.39			
		Grand Total	**$67,560.78**	**$3,404.87**	**$70,965.65**			

Printer Setup | **Original Project - Print Menu - Project Job Costing** | ? | Home

EME Audio & Video Systems
hp LaserJet 1320 PCL 6,winspool,Ne02:

LeRoy Asher | Done

Home Entertainment System
1260.1-1.100

Project Job Costing
- Master Project Pricing
- Payments & Balances Summary

Product Costing
- Areas & Products (Summary with prices)
- Areas & Products (Summary without prices)
- Product Line List (Summary with prices)
- Product Line List (Line items with prices)

By Discipline
- Subtotals by Discipline
- Grand Totals by Discipline

By Area
- Subtotals by Area
- Grand Totals by Area

By Phase
- Subtotals by Phase
- Grand Totals by Phase

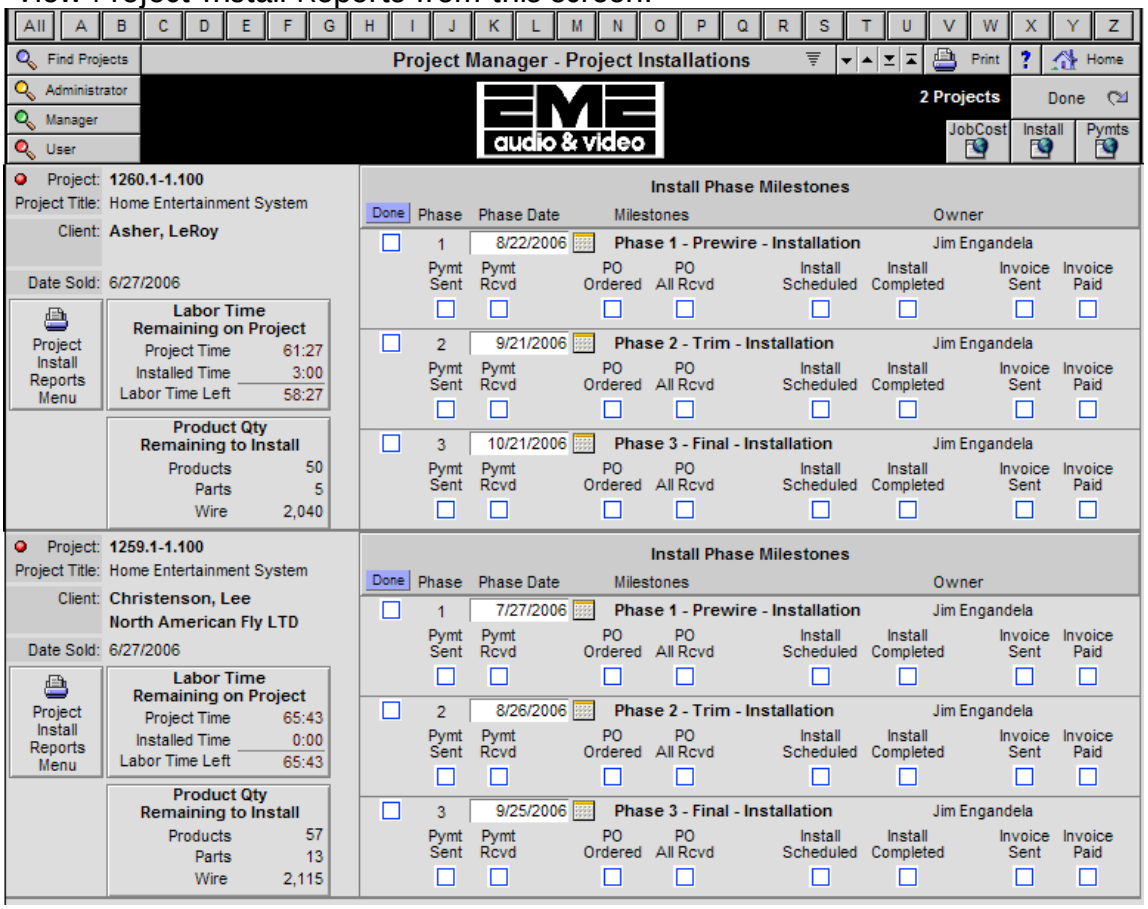
Summary by Phase
- Products/Supps/Labor

Enhancement-Project Manager: Project Installations

-Status of Payments, Purchase Orders, Installations and Invoices.

-Labor Time Remaining on Project and Products Remaining to Install when WO's

-View Project Install Reports from this screen.



Printer Setup

Project Installation Print Menu

? Home

EME Audio & Video Systems
hp LaserJet 1320 PCL 6,winspool,Ne02:

LeRoy Asher

Done

Home Entertainment System
1260.1-1.100

Installation Utilities

Select Phase
- ☐ 1 Prewire
- ☐ 2 Trim
- ☐ 3 Final

Staging Document (products & parts)

Staging Document Summary with total quantity (+ - sum) (products & parts, wire)

Product Specifications

Product Cut Sheets

Staple Up Cards

Products & Parts must be checked to "Issue" in the Product Library

Product Install Tasks

Project Summaries

Master Project Pricing

Payments & Balances Summary

Installation Items
Installed vs Remaining to Install

Work Order Items
Issued vs Installed

Sales Invoice Items
Issued vs Paid

Purchase Order Items
Issued vs Received

Project Utilities

Client/Project Info

Project Site Directions

Product Tax Summary

Product Warranties

Enhancement-Project Manager: Payment Tracker

-Now shows Amount Remaining to Invoice for each project

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

Find Projects | Proj Balance Due | **Project Manager - Project Payment Tracker** | Print | ? | Home

Administrator | Manager | User | EME audio & video | 2 Projects | Done | JobCost | Install | Pymts

Total Amount Remaining to Invoice
$88,542

Total Master Project Amounts	$127,736.96
- Total Master Project Payments Made	$5,788.13
Total Master Project Balance Due	$121,948.83

Number	Rep	View/Modify Payment Details and Change Orders	Deposit	Payment 1	Payment 2	Payment 3	Retainer	Total
Project: 1260.1-1.100		Original Project	$5,677.13	$17,031.39	$11,354.26	$17,031.39	$5,677.13	$56,771.31
Project Title: Home Entertainment System		Payment Due Dates	8/22/2006	8/22/2006	9/21/2006	10/21/2006	10/21/2006	
Client: Asher, LeRoy		- Payments Made	$5,677.13					$5,677.13
							Original Project Balance Due	$51,094.18
Date Sold: 6/27/2006		Change Orders						
		- Total Payments Made						
							Change Order Balance Due	
		Master Project	$5,677.13	$17,031.39	$11,354.26	$17,031.39	$5,677.13	$56,771.31
		- Total Payments Made	$5,677.13					$5,677.13
1260.1-1.100		Master Project Balance Due	$0.00	$17,031.39	$11,354.26	$17,031.39	$5,677.13	$51,094.18
Project: 1259.1-1.100		Original Project	$6,756.08	$20,268.23	$13,512.16	$20,268.23	$6,756.08	$67,560.78
Project Title: Home Entertainment System		Payment Due Dates	6/27/2006	7/17/2006	8/16/2006	9/15/2006	1/3/2007	
Client: Christenson, Lee		- Payments Made	$111.00					$111.00
North American Fly LTD							Original Project Balance Due	$67,449.78
Date Sold: 6/27/2006		Change Orders	$340.49	$3,064.39			$0.00	$3,404.87
		- Total Payments Made						
							Change Order Balance Due	$3,404.87
		Master Project	$7,096.57	$23,332.62	$13,512.16	$20,268.23	$6,756.08	$70,965.65
		- Total Payments Made	$111.00					$111.00
1259.1-1.100		Master Project Balance Due	$6,985.57	$23,332.62	$13,512.16	$20,268.23	$6,756.08	$70,854.65

Amount Remaining To Invoice

Project Total	$56,771.31
Total Invoiced	$39,195.42
Amt to Invoice	**$17,575.89**

Amount Remaining To Invoice

Project Total	$70,965.65
Total Invoiced	
Amt to Invoice	**$70,965.65**

Enhancement-Project Manager: Purchase Orders

-Shows all Project PO's in the system with the PO and Project Numbers and enables you to go directly to the PO to modify it.

Global Purchase Orders

Page ? Home

View of all Issued PO's

Leave

PO's WO's SI's

PO #	PO Date	Vendor	PO Total	Project #	Client	Issued Date	View
1066	9/27/2005	Linn Products	$900.00		John & Mary Smith	9/27/2005	
1067	9/27/2005	Monster Inc	$2,397.00		John & Mary Smith	9/27/2005	
1069	6/27/2006	Capitol Sales Company	$6,304.76	1260.1-1.100	LeRoy Asher	6/27/2006	
1070	6/27/2006	Sony Inc	$2,620.00	1260.1-1.100	LeRoy Asher	6/27/2006	
1071	6/28/2006	Capitol Sales Company	$2,388.00	1259.1-1.100	Lee & Kris Christenson - North	6/28/2006	

Enhancement-Project Manager: Work Orders

-Shows all Project WO's in the system with the WO and Project Numbers and enables you to go directly to the WO to modify it.

Global Work Orders

Page ?

View of all Issued WO's

Leave

PO's WO's SI's

Work Order #	WO Date	Proposal	Client	Qty Left to Install	Issued Date	Print/Post	View
1019	9/8/2005		John & Mary Smith	0	9/8/2005		
1025	10/15/2005		John Monny - Monster Inc	1	10/15/2005		
1027	10/15/2005		LeRoy Asher	1	10/15/2005		
1036	10/20/2005		Jim Engandela	-15	10/20/2005		
2001	6/27/2006	1260.1-1.100	LeRoy Asher	38	6/27/2006		
2002	6/27/2006	1259.1-1.100	Lee & Kris Christenson - North	0	6/27/2006		
2003	6/28/2006	1259.1-1.100	Lee & Kris Christenson - North	0	6/28/2006		
2004	6/28/2006	1259.1-1.100	Lee & Kris Christenson - North	0	6/28/2006		

Enhancement-Project Manager: Sales Invoices

-Shows all Project SI's in the system with the SI and Project Numbers and enables you to go directly to the SI to modify it.

Global Sales Invoices

Page ?

View of all Issued SI's

Leave

PO's WO's SI's

SCPS Invoice #	QB Invoice #	Posting Date	Invoice Date	Invoice Total	Proposal	Client	Print/Post	View
1020	200496	9/8/2005	9/8/2005	$1,500.00		John & Mary Smith		
1026		10/20/2005	10/20/2005	$1,844.40		Jim Engandela - Horizon Software		
1038		10/21/2005	10/21/2005	$142.79		Jim Engandela		
1039		10/21/2005	10/21/2005	$428.38		Jim Engandela		
3001		6/27/2006	6/27/2006	$39,195.42	1260.1-1.100	LeRoy Asher		
3003		6/27/2006	6/27/2006	$0.00		LeRoy Asher		

Enhancement-Project Manager: History of Project Products

-Shows all Products in all Projects in the system with the Project Numbers and dates

-Clicking underlined Product Make:Model:Discpline:Types enables you to easily find like kind products.

-Report Summaries all like kind product quantity and extended selling prices

Show All Products | Sort All Products | History of Products Sold | Print | ? | Home

For Projects & Change Orders
View/Print Report for total Qty of each product

55 Products | Leave

Date Sold	Project	Make	Model	Discipline	Type	Qty	Unit Sell Price
6/27/2006	1259.1-1.100	Linn	5101 Personal Handset	Automation	Handheld Remote	1 ea	$390.00
6/27/2006	1260.1-1.100	Linn	5101 Personal Handset	Automation	Handheld Remote	1 ea	$312.00
6/27/2006	1259.1-1.100	Linn	Aktiv Modules	Audio	Final Part	3 ea	$255.00
6/27/2006	1260.1-1.100	Linn	Aktiv Modules	Audio	Final Part	3 ea	$204.00
6/27/2006	1259.1-1.100	Linn	Classik Music-S	Audio	CD Player	1 ea	$1,550.00
6/27/2006	1260.1-1.100	Linn	Classik Music-S	Audio	CD Player	1 ea	$1,240.00
6/27/2006	1259.1-1.100	Linn	Ikemi	Audio	CD Player	1 ea	$3,900.00
6/27/2006	1260.1-1.100	Linn	Ikemi	Audio	CD Player	1 ea	$3,120.00
6/27/2006	1259.1-1.100	Linn	K600 Cable	Wire & Cable	Interconnect Cable	20 ft	$10.36

7/12/2006 | EME Audio & Video Systems - Confidential Report | Page 1

History of Products Sold

Date Sold	Project	Make	Model	Qty	Unit Sell Price
6/27/2006	1259.1-1.100	Linn	5101 Personal Handset	1 ea	$390.00
6/27/2006	1260.1-1.100	Linn	5101 Personal Handset	1 ea	$312.00
			Total Qty & Price	**2 ea**	**$702.00**
6/27/2006	1259.1-1.100	Linn	Aktiv Modules	3 ea	$255.00
6/27/2006	1260.1-1.100	Linn	Aktiv Modules	3 ea	$204.00
			Total Qty & Price	**6 ea**	**$1,377.00**
6/27/2006	1259.1-1.100	Linn	Classik Music-S	1 ea	$1,550.00
6/27/2006	1260.1-1.100	Linn	Classik Music-S	1 ea	$1,240.00
			Total Qty & Price	**2 ea**	**$2,790.00**

Enhancement-Product Library / Inventory Control / Inventory

-Perpetual inventory count

-Set Optimum and ReOrder levels for your Products

-Take Physical Inventory Count, click Adjust IOH Qty button to enter

-Inventory On Hand count is adjusted when you Invoice Products on a Project and when you Receive Products on Project PO's.

-Print Inventory report with Totals

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

Find Products | Fav A | B | C | **Product Library - Inventory Control** | Print | ? | Home

Show Products | Show Parts | Bulk | PreCut

Inventory on Hand is determined by
Physical Count + Project PO Receiving + Invoicing

183 Products | Leave

ReOrder Report | Adjust IOH Qty with Physical Count | Show Qty on Hand

Class	Make	Model	Hide	Optimum Level Qty	Optimum Level Value	ReOrder Point	To Order Qty	Physical Count	Inventory on Hand Qty	Inventory on Hand Value
		Totals			**$2,069,676.60**		**$2,318.42**			**$1,707,775.30**
	Linn	5101 Personal Handset	☒	6	$1,404.00	2			4 ea	$936.00
	Linn	5103 System Controller	☒	6	$19,800.00	2			5 ea	$16,500.00
	Linn	5110 Grilles-G	☐	6	$162.00	2			5 pr	$135.00
	Linn	5110 Grilles-S	☐	6	$162.00	2			5 pr	$135.00
	Linn	5110-W	☒	6	$1,170.00	2			5 ea	$975.00
	Linn	5125	☒	6	$9,900.00	2			5 ea	$8,250.00
	Linn	Akito	☐	6	$3,960.00	2			5 ea	$3,300.00

7/12/2006 **Inventory Report** Page: 1

by Manufacturer

Make Model	Physical Count	Inventory on Hand Qty	Inventory on Hand Value
		Total	**$1,707,775.30**
Audioquest : AQBFA		5 pkg	60.00
		Audioquest	**$60.00**
Better Cables : HDMI-1meter		5 ea	300.00
		Better Cables	**$300.00**
Draper : 579fnif		5 ea	300.00
Draper : fj4j0		5 ea	300.00
Draper : Luma-106" HDTV		5 ea	1,200.00
		Draper	**$1,800.00**

Enhancement-Project Tracker

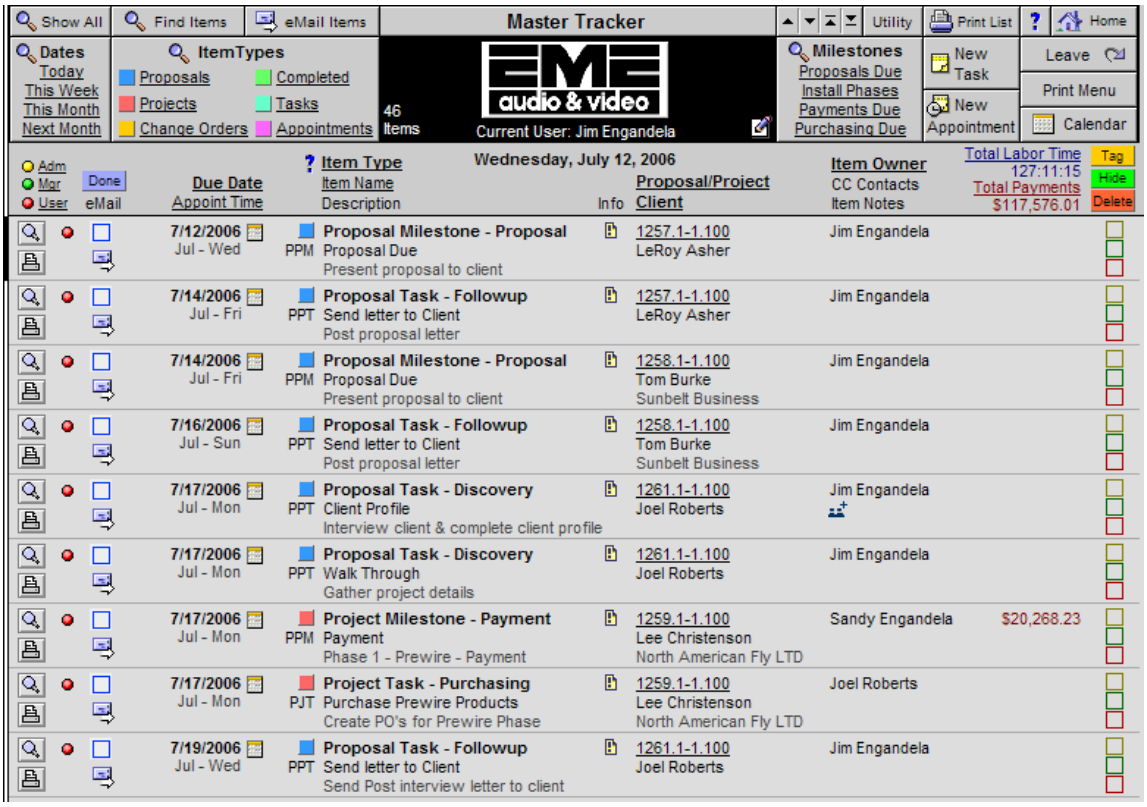
-New Item Type Code on each item. This Code shows up on the Calendar view making it easy to identity Items.

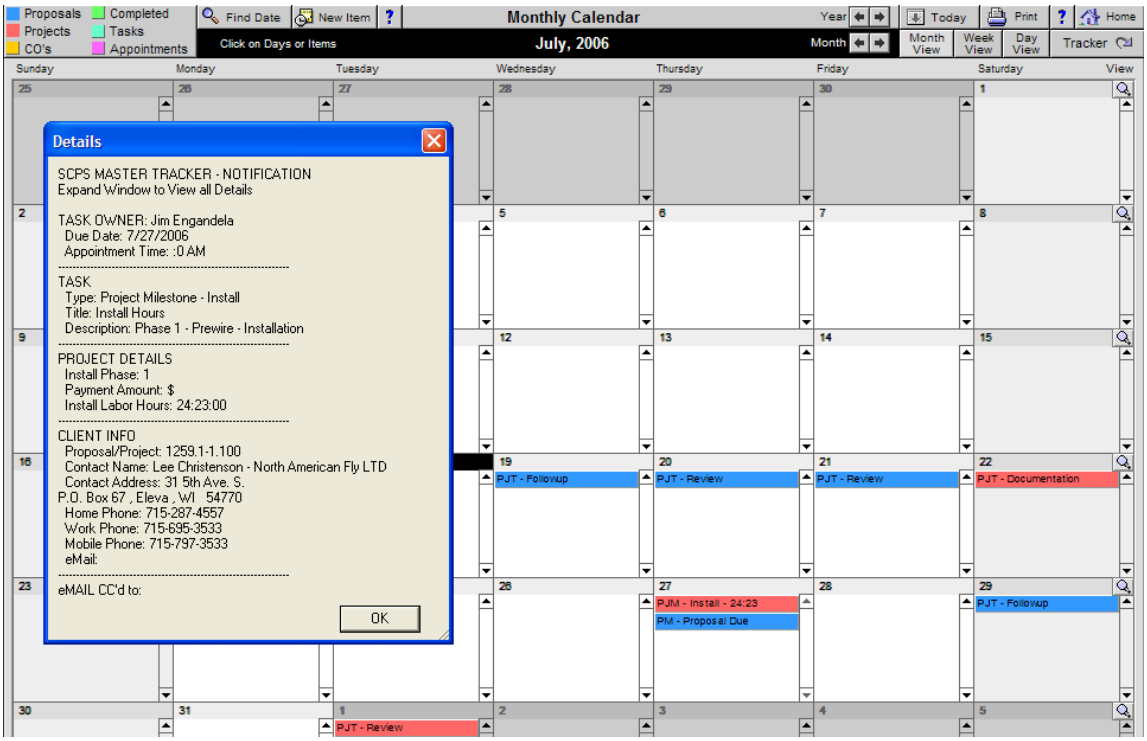
-Going to Calendar now goes to the month of the 1st item in the tracker list.

-Calendar View now shows Installation time on each Install item.

-Clicking on any item in the Calendar pops up full details on that item.

-Printing Calendar now works for all Views: Month, Week, Day





Enhancement-Proposal/Contract: Show Discount with Amounts
Contact Discount now shows the Pre-Discount Subtotal, the Discount amount and the Post Discount Subtotal on the Contract when the "Show Discount" print option is selected. You can set the Labels for these subtotals in the Master Prefs/Proposal/Pricing screen, and in the Proposal/Preferences/Pricing screen. This new discount display shows in the regular and the user Contracts.

Enhancement-Product Library: Show Hidden Products
Add a view button on top of the Hidden column to show all products including the Hidden ones and sort by the Hidden products.

Enhancement-Proposal/Pricing/Tax Screen: Speed enhancement
Removing background calcs speeds up the screen refresh

Enhancement-Project/Utility
Repost Original Project totals and payments

Enhancement-Proposal/Area Text: Category & Title display indicators
Add a white indicator behind the selected Text in the Text Category and Text title portals. This makes it easier to tell which text category and title has been selected.

Enhancement-Product Library/Product Pix Detail: Web Picture Search

This “Search Web for product pictures” button will display all of the pictures on the Web of the product you are on. You can save any of these pictures to your SCPS pix folder and link them to this SCPS Product. An icon to open the Internet Explorer directly has also been added to this screen.

Enhancement-Contacts/Contact Detail: Phone Speed Dial
Speed dialing has been added to each contact phone number. Click the phone icon next to a phone number to speed dial that number. Users must have their computer modem connected to a phone. This feature is for Windows users only and not supported for Mac users.

Enhancement-Proposal Print Menu/Area & Products Report: Locations
Increase the location field on this report and the Product Detail screen to 4 lines. The 2nd and remaining line indentation has also been removed for better appearance.

Enhancement-RCMS Proposal Client Info Screen/Pop up City/State/Zip
Change the City/State/Zip pop up value lists to manual buttons. These values come from the Master Prefs/Bookkeeping/RCMS screen.

Enhancement-Contact/Vendors/Assign Vendor list
Increase the size of the vendor list screen to accommodate more vendors.

Enhancement-Project/PO/PO Quantities
Increase the product qty by one digit to show (half) 1.5 units.

Fix-Proposal/Labor Supplement/Edit Supplement
Editing a labor supplement now returns from the Labor Detail screen to the Labor Supplement screen in all cases.

Fix-Proposal/Print Menu: Master Project Reports. Trap CO number posting
In some cases if all final CO’s have been deleted from a Master Project the reports were not finding any records. This has been corrected.

Fix-Proposal/Labor Supplement now picks up correct Labor 1,2,3
When selecting Optional Labor Rates 1,2,3 labor supplements added to a proposal now pick up the correct labor rate for the selected 1,2,3 Option.

Fix-Proposal/Print Menu/Custom Contract Report Tax Label
The tax label on the Custom Contract Report module now shows properly.

Fix-Product Library/Product Group Utility: Return to Portal Row

The “Go To Last Selection” button now properly finds the last selected Product Group.

Fix-Proposal/Supplement Detail/Labor/Parts/Wire: Deleting Portal Row
Deleting a portal row only deletes that row and keeps you in the right screen

Fix-Proposal/Parts/Wire Supplements/Adding a Pure Supplement Labor
Adding a pure Part or Wire supplement now correctly adds the Labor time and amounts to the labor associated with the Part or Wire.

Fix-Project/Purchase Orders/PO Summary Report: Combining Products. This report now combines all like kind products and quantites on each PO in this PO summary report, like it does on the individual PO’s.

Fix-Flanner’s Dealer Payment Plan’s: Tweak values
Values for both New and Retro Construction Payment plans have been changed to properly reflect payment amounts based on Proposal and Phase totals.

Fix-Chelsea/RCMS Product Import Map
Adjust the RCMS product import map to work with the current Chelsea SQL statement

SCPS Version 4.15v3
Released: 6/29/2006

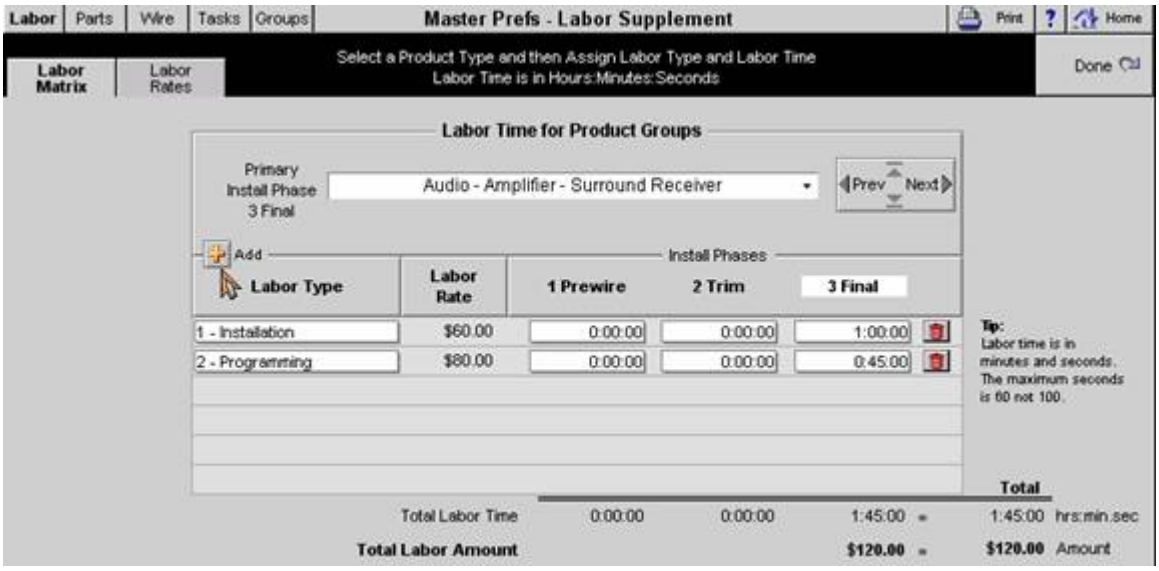
Fix-Reset Proposal and Project Print Option: Product Pricing flag
Upgrading to this version will reset all of the Product Pricing flags from your previous setting to the new settings so that the correct product prices will show up on the printed proposals.

SCPS Version 4.15v2
Released: 6/21/2006

Enhancement-Proposal Pricing Screen Speed Improvement
Significant speed improvement has been incorporated to the Proposal Pricing screen, with the additional benefit of displaying all costs, profits and GP% without the need to click a button to display these numbers. This speed enhancement will be particularly evident on large proposals.

Enhancement-Master Prefs/Labor Portal

A new “Add Labor Type” button has been added to the Labor Portal to allow users to add a new Labor Type to a record. The pop-up Labor Type value list now also only displays those Labor Types that are not currently used in the portal. Add buttons have been created for all Labor portals to add new labor instead of filling in a blank portal record. This provides better control of the data entry process and reduces the risk of further user error in this area.



New “Add Labor Type” Button

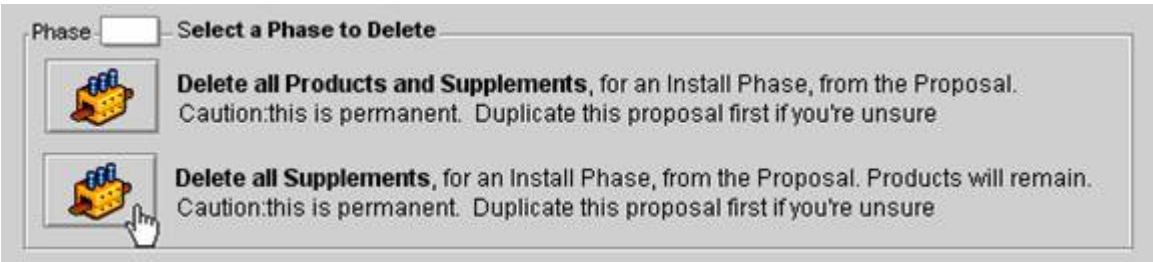
Enhancement- Proposal Area & Products Report: Expand Locations

The Product Location field has been expanded to three lines on the Areas & Product report to accommodate additional data.

Enhancement- Change Order Numbers on Master Project Reports

Change Order numbers have been added to Master Project Areas & Products Report so that the report will display all of the applicable Finalized Change Order numbers in the upper left hand corner of the output.

Enhancement-Proposal Utility: Delete All Supplements
A new Proposal Utility button, Delete all Supplements has been added to the system. This will allow a user to remove all supplements for a specific Install Phase from a Proposal. Products in that Phase in the Proposal will be unaffected. **Caution:** Changes performed with this utility are irreversible, so use this function with care. Duplicate the Proposal first if you're unsure about anything.



Delete all Supplements Utility

Enhancement- Proposal Wire Supplements: Delete Check Boxes
Delete check boxes have been added to facilitate the deletion of multiple items at one time.

Enhancement- Proposal/Areas & Products screen: Delete Check Boxes
Delete check boxes have been added so that multiple items can be deleted at one time.

Enhancement – Integration of the CPS database into SCPS
All CPS files and relationships have been modified so that they integrate seamlessly into SCPS for users that want to access their old CPS files and/or want to migrate slowly into SCPS. This enhancement will also enable us to easily upgrade these SCPS/CPS files as we upgrade CPS.

Call Horizon if you need assistance with this installation.

Download these files.

http://www.horizon-software.com/download/CPS_SCPS_Files_7.9v2.zip

http://www.horizon-software.com/download /SCPS with CPS Install & Upgrade Guide.pdf

Enhancement-Project and Finalized Change Orders: Print Preferences View Only Screens
Print Preferences "View only" screens in Projects and Final Change Orders have been added so that users can see what preferences have been set for a specific Project or its Change Orders.

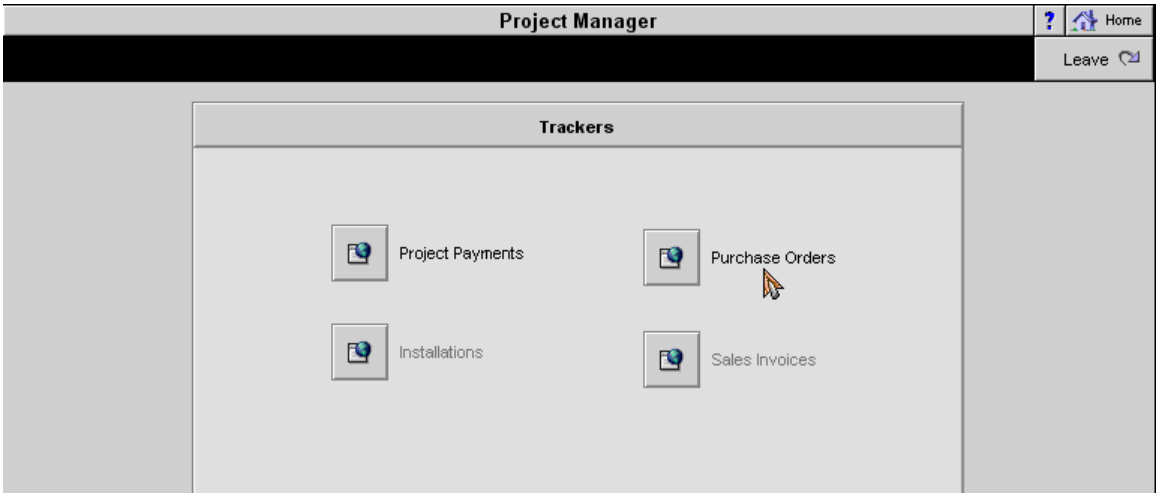
Enhancement-Increased Speed of Opening and Closing sequences
The Core.fp5 file from SCPS and Updater.fp5, DataHold.fp5 files from CPS have been removed from the closing routine in an effort to increase the speed of the software opening and closing sequences.

Enhancement- Sound Components & Chelsea RCMS Imports
Both the Make and Models have been capitalized when importing Product data from RCMS into the SCPS Product Library.

Enhancement- Proposal Contract Text Size
The size of entry area allocated for the Proposal Contract text has been dramatically increased from 2 pages to 5 pages.

Enhancement- Product Library – Find Products
Users enlisting the "Find Products" feature and that don't find the products that met the criteria specified you are now returned to the Product Library without having to wait for the products to sort. After this the Alpha Finder can be used to select the desired products.

Enhancement - Main/Project Manager/Global Purchase Order List
Users can now, from one screen, **globally** view and enter all Posted Purchase Orders created in Projects. This new feature will streamline the receiving process of Products as well as provide an easy-to-use quick reference for printed Purchase Orders.



Global Purchase Order Access point

Fix – Main Screen/Project Manager/Export Project Data to Excel
This utility now exports all Master Project subtotals which now include all Change Orders, instead of only the Project subtotals.

Fix – Project/Purchase Orders: Unit Raw Cost
Purchase Orders now pick up the Raw Cost of the products directly from the Product Library insuring that the latest cost is reflected on the Purchase Order.

Fix – Completed & Archived Proposals: Navigate to Payment Screen
Navigating to the Payment screen in Completed and Archived proposals brought you to a blank Horizon screen. This has been corrected with this release.

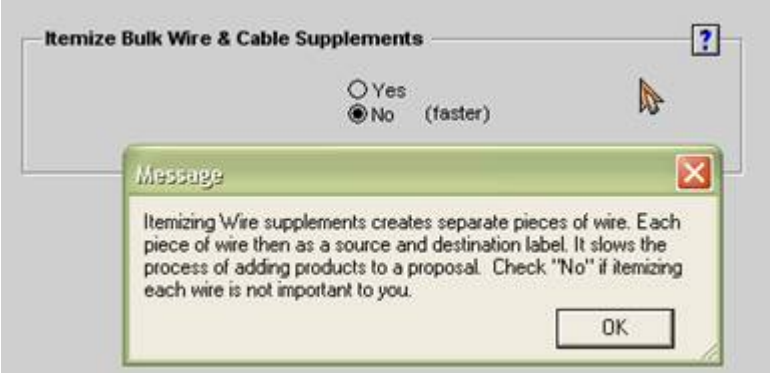
Fix – Proposal Print Menu/Master Proposals by Area & Phase Reports
These 2 reports now sort properly by Zone and Area.

Fix – Product Library: RCMS Importing Precut Wires
Pre-cut wire and cable flags are now reset after importing RCMS products into the Product Library, ensuring that they will be correctly formatted. This in turn ensures that Labor supplements are added properly when wires are added to a proposal.

Fix – Proposals/Area & Products screen: Deleting Last Product
Deleting the last product in an Area on the Proposal Area and Products screen now allows users to remain within the specific proposal.

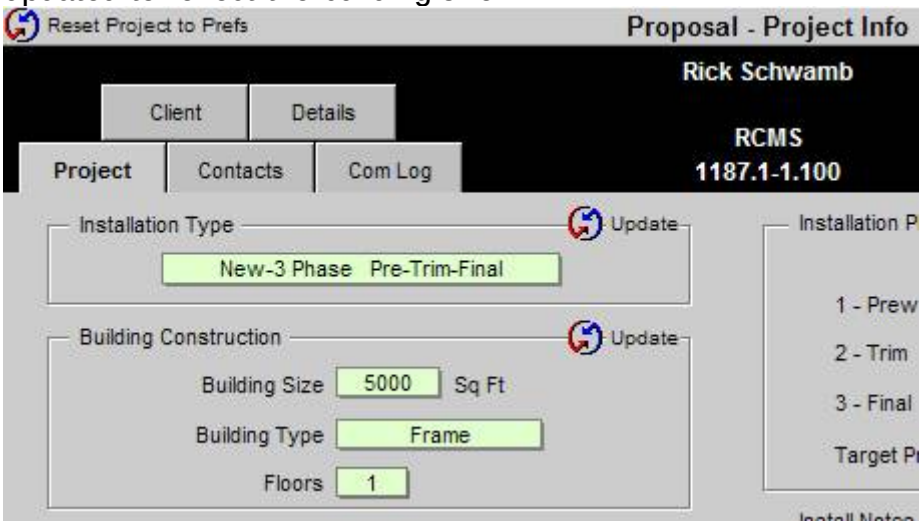
Fix - Speed Enhancement using Home button to Logo Screen
The use of the Home button from some screens was leaving the Proposal Pricing screen in the background, causing that screen to be calculated and slowing the refresh of the Logo screen. This has been improved upon and should no longer impact any system performance.

Fix – Proposal Wire Itemization Button Now Fully Functional
Wire Itemization now creates a separate wire record in a Proposal for each bulk and Pre cut wire. This enables the Wire Manager to assign source and destination labels to each end of the wire. If you don't use the Wire Manager then it is faster to set the Preferences/Other/Products setting to Do Not Itemize Wire.



Wire Itemization Preference

Fix – Proposal/Project: Update Bulk Wire Lengths
Proposal Wire Supplements are now been stamped with the Wire Quantity when the Update button is used so that legacy bulk wire records will have their length updated to reflect the building size.



SCPS Version 4.14
Released: 5/25/2006

This revision includes a data maintenance routine that may run during your upgrade process and take some extra time. Please do not interrupt the upgrade process and wait until it is completed.

Enhancement-Proposal / Product Detail & Labor screens: Rework all Labor calcs and details

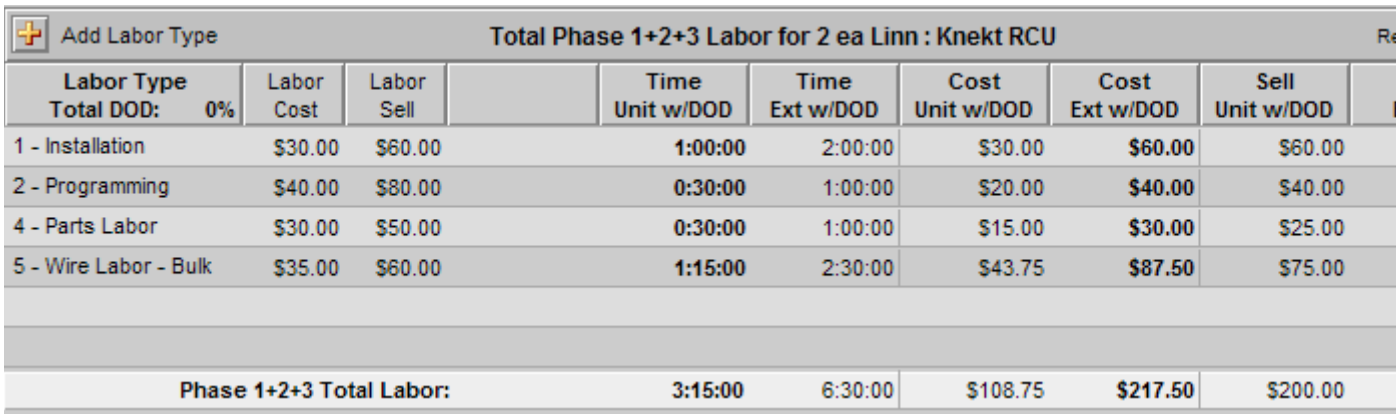
Extensive work has been performed in the areas of the Product, Parts, and Wire Labor supplements on Proposal Products. Users can now clearly see the Product and Supplement Prices with *and* without Labor, as well as the Extended Prices based on the Product Quantity. Two new Labor View screens have been added to the Labor Detail screen as well. This work has corrected the former display of Product/Supplements prices in the Proposal reports and handles Phantom Product prices accurately.

Unit	ea
Unit Price	
List	
Sell	$750.00
Minimum Sell	
Loaded Cost	$450.00
Raw Cost	$450.00
Discount	
Discount Adjustment	
Sell GP%	40.0%

	Parts Cost	Wire Cost
Unit	$62.00	$37.50
Extended	$124.00	$75.00

	Product Unit Price w/Adjustment	Parts Unit Total	Wire Unit Total	Unit To Produ Parts &
Sell	**$750.00**	$105.00	$120.00	**$975.0**
Labor	$30.00	$475.00	$75.00	**$580.0**
Installed	**$780.00**	**$580.00**	**$195.00**	**$1,555.0**
Labor Time	0:30:00	9:30:00	1:15:00	**11:15:0**

Extended Qty 2	Product Extended Price w/adjustment	Parts Extended Total	Wire Extended Total	Extended Produ Parts &
Ext Sell	**$1,500.00**	$210.00	$240.00	**$1,950.0**
Ext Labor	$60.00	$950.00	$150.00	**$1,160.0**
Ext Installed	**$1,560.00**	**$1,160.00**	**$390.00**	**$3,110.0**
Ext Labor Time	1:00:00	19:00:00	2:30:00	**22:30:0**



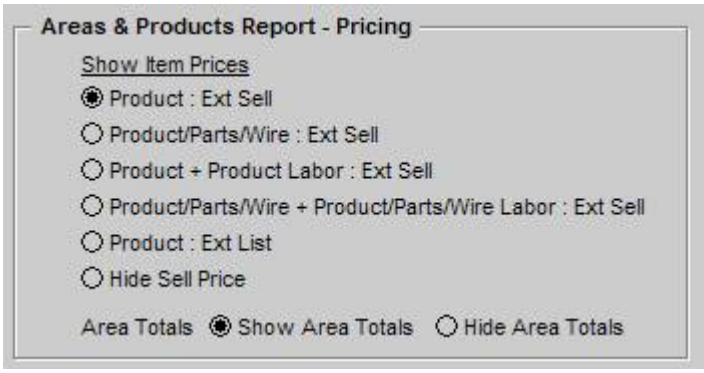
Add Labor Type — Total Phase 1+2+3 Labor for 2 ea Linn : Knekt RCU

Labor Type Total DOD: 0%	Labor Cost	Labor Sell		Time Unit w/DOD	Time Ext w/DOD	Cost Unit w/DOD	Cost Ext w/DOD	Sell Unit w/DOD
1 - Installation	$30.00	$60.00		**1:00:00**	2:00:00	$30.00	**$60.00**	$60.00
2 - Programming	$40.00	$80.00		**0:30:00**	1:00:00	$20.00	**$40.00**	$40.00
4 - Parts Labor	$30.00	$50.00		**0:30:00**	1:00:00	$15.00	**$30.00**	$25.00
5 - Wire Labor - Bulk	$35.00	$60.00		**1:15:00**	2:30:00	$43.75	**$87.50**	$75.00
Phase 1+2+3 Total Labor:				**3:15:00**	6:30:00	$108.75	**$217.50**	$200.00

Enhancement-Proposal Product Pricing Display Options

New options for displaying Product prices have been provided that now include the total price of a Product with its Parts and Wire supplements, as well as an option to display the Labor of the Product along with its Parts and Wire labor.

During the upgrade process your old settings in Master and Proposal Prefs will be converted to one of these new settings. Please check your Master Prefs/Proposal/Print Options post-upgrade to be sure you have yours set to your preference.

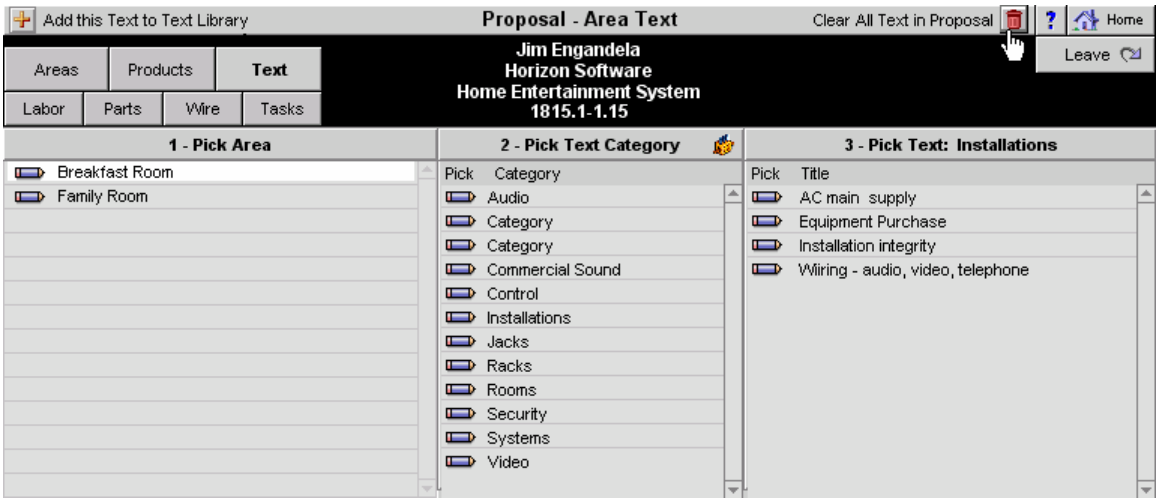


Enhancement-Proposal/Areas & Products: Return to the selected Area from Product Detail screen.

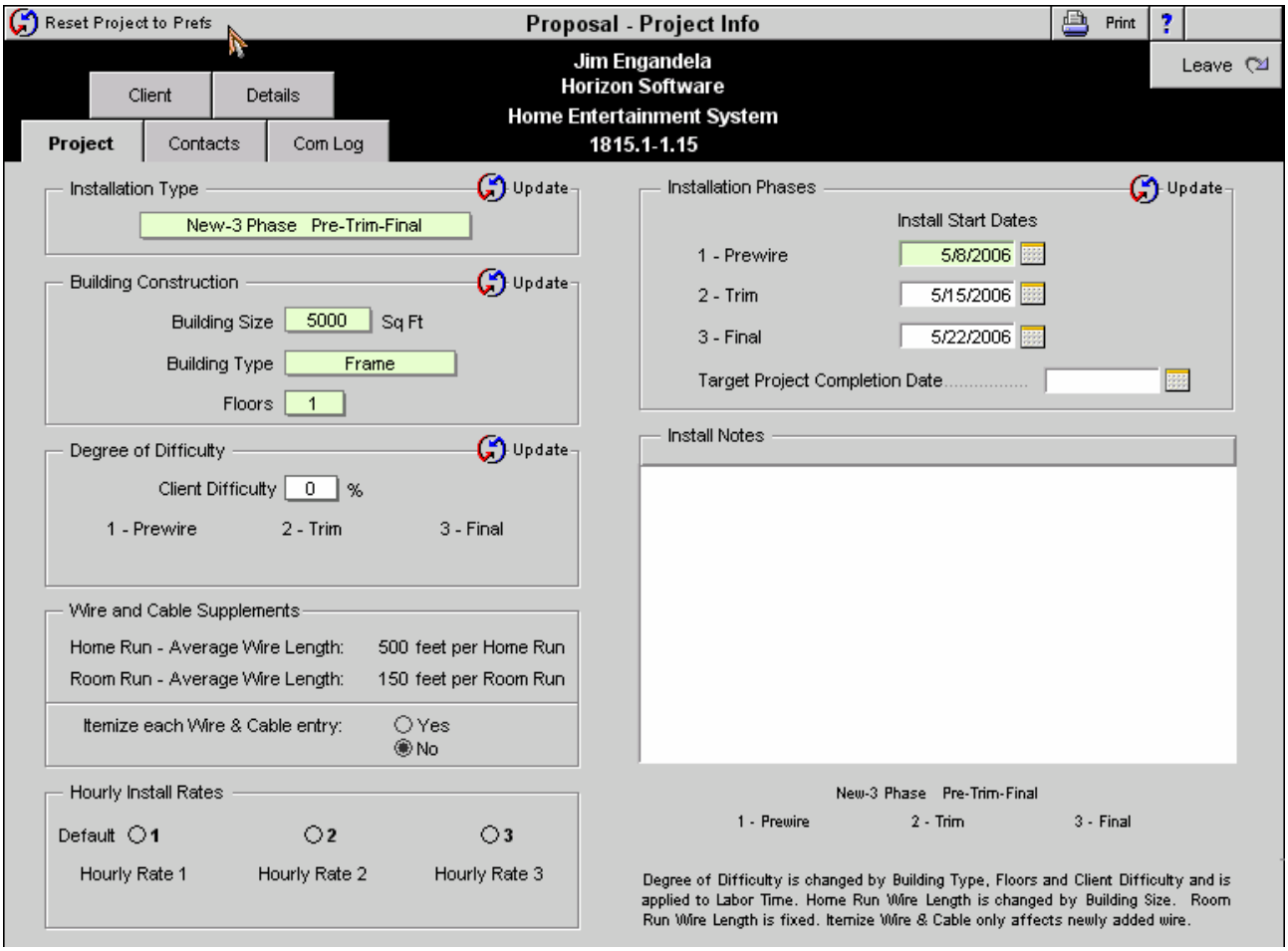
Users in a Proposal that click on an Area and then click on a Product to view the details, and subsequently wish to return to the current Area will now be returned directly there. This will be consistent even if the user cycles through previous/next records. The user will always be returned to the Area of the Product that was last viewed.

Enhancement-Proposal/Area Text: Clear All Proposal Area Text

A new button on this screen enables you to clear all of the Area Text on every Area in a Proposal at one time. Use of the "Clear All Text in Proposal" button will not affect your Master Text Library.



Enhancement-Proposal/Project: Reset Install Type & Wire Defaults
A new button "Reset Project to Prefs button" enables you to reset the Install Type, Bulk Wire Length, Building Type, Number of Floors and Degree of Difficulty back to the Master Prefs Default Settings.



Fix-Project/Pricing screen: Post Original Proposal & Final Change Orders, which corrects the Master Project Sub and Grand Totals
During the upgrade process all of your Original Proposal subtotals and Final Change Order subtotals will be reposted so that they display properly in the Project Pricing screen. The Master Project Fees subtotal is now correctly displayed. (dev note: nav dev layout. clear zxc.toggle.co field on open)

Fix-Proposal/Print Options screen: Show only Area text-Hide Products
The Qty and Ext Price fields now are not displayed on the Areas & Products report when this print option is selected.

Fix-Proposal/Product Detail/Labor screen: Adding New Labor Type

Users are now prevented from being able to add erroneous duplicate Labor Types at the Product Labor Supplement level. It had been determined that multiple entries of the same Labor Type was causing calculation errors.

Fix-Master Preferences: Fees Tab Labels
During the upgrade process, if your Fees Tab Labels are blank they will be populated with Project, Services, and Expense labels.

Fix-Master Preferences/Labor: Add Change Labor Types
Under certain sets of conditions, Administrators were being prevented from adding new Labor Types to a Product Group because of a validation warning message that was being triggered. This has been corrected.

Fix-Proposal/Product Detail/Labor screen: Adding new Labor type
If a Labor Type exists on a product then you are no longer able to accidentally add another Labor Type entry of the same Type. Multiple entries of the same Labor Type was causing math errors.

Fix-Master Preferences: Fees Tab Labels
During the upgrade process, if your Fees Tab Labels are blank they will be populated with Project, Services, Expense labels.

Fix-Master Preferences/Labor: Add Change Labor Types
Under some conditions it was not possible to add new Labor Types to a Product Group because of a Validation warning message being triggered.

Fix-Master Project Pricing & Final Change Order/Print Pricing Reports
Original Proposal and Final Change Order totals have been added to the Master Project Report. The Final Change Order Pricing Report has also been fixed so that it now prints the correct report.

Fix-POS Work Order: Add info to printed report
Job Contact, Location and Phone have all been added to the printed POS Work Order.

Fix-Project Pending & Final Change Order Report: CO Number
A new Change Order number has been added to both of these reports so that it displays the proper Change Order number on all pages of these reports.

Fix-Proposal/Project Info: Update Bulk Home Run Wire Lengths
In some user's data, updating bulk wire run lengths from the Project Screen was failing. This fix restores the wi.class values in the Wire.fp.5 file on those records enabling this utility to function properly.

SCPS Version 4.13b
Released: 5/03/2006

Fix-Proposal/Projects Lists: Show Proposals/Projects by User Access Levels

Adding the "Global Proposal" feature that enables a Proposal to be shown to all users caused all proposals/projects to be shown to all users. This has been fixed so that Users only see those Proposals/Projects that they created, Managers only see those Proposals/Projects that they created or are the Project Manager for and Administrators see all Proposals/Projects.

Enhancement-Proposal Lists: Show "Global Proposal" indicator

Proposals that have been designated as a "Global Proposal" now have a purple indicator displayed under the Access Level indicator, next to each proposal in the Proposal List screen.

Enhancement-Proposal/Utility/Admin Utility: Access Rights

Access Rights for the Admin Utility screen (from the Proposal Utility screen) are now available for each user on the Master Prefs/User Access Rights screen.

Enhancement-Proposal/Project Lists: Display User & Access Level

The Proposal/Project/Completed/Archive lists screens now show the Logged in User name and his Access Level at the top of each screen underneath the Company logo.

SCPS Version 4.13
Released: 5/02/2006

Enhancement-Proposal Products Utility: Replace & Update All Products

A new Utility in the Proposal Detail/Utility screen has been added that will allow the user to completely replace/update all of the Products, Supplements (Parts, Wire, and Labor) and Prices in a Proposal to match the most current Product details in the Product Library.

Enhancement – Product Library: Descriptions

When a user is viewing the Product Library/Line List and clicks on the description field of a specific Product, the full description of that Product will now display.

Enhancement – "Global Proposals" Show a Proposal for all Users

For those sites that like to use certain Proposals as Templates to be duplicated for new clients, a new option has been added. This utility provides the ability to allow access to view these Proposals to all users, regardless of their user Access

Level (Administrator, Manager, or User). This utility check box is located in the Proposal Detail/Utility/Admin Utility screen.

Enhancement – Product Library/Product Pix Detail: View Larger Images

In an effort to allow an increased graphic viewing capability, a new "View Larger Pix" button has been added to the Product Pix Detail screen. This button will enable users to view all six pictures in a 600 x 600 size. In the upper left corner of this new screen the user can select the picture they wish to view in this large size.

Enhancement – Master Prefs/Proposal Fees Labels

Users can now modify both the Fees screen Tab labels and the Proposal Fees report headers. **Project/Services/Expense labels can be added & changed globally at the top of each Master Preferences Fees screen.** Proposal Fees report headers can be changed for new Proposals at the top of each Master Prefs Fees screen and for existing Proposals at the top each Fees screen in that Proposal. If these new Tab and Report label fields are blank, then the default labels will appear as they as they always have.

Enhancement – Product Library/Find Products

The speed of "Finding Products by Make and Model" has been enhanced with the addition of a larger Make & Model field that shows all of the Makes in your Product Library. When the user clicks on a Make, all of the Models for that Make are now shown in the Model field. Note: Click on the Show All Makes in list button at the top of the Makes in your product library are not shown.

In addition to this, for our RCMS users, Horizon has added Status Code "X" to the More Criteria screen for finding imported RCMS items that have a status code of "X".

Enhancement – Project Manager/Export All Project Data to Excel

New functionality has been added that will allow the export of all of the Project data totals for all Projects in SCPS to a file that can opened by Excel. This data includes Payments and Subtotals by Phase. This button can be found on the Main Logo/Project Manager screen. Instructions on proper usage are shown when you click on the button.

Note: This process can take some time if you have many large Projects.

Enhancement – Contacts/Entities/Attach Documents & Files
Ten new fields have been added to the Contacts/Contact Detail/Entities screen. These new fields will enable users to enter the path/file name of documents for that contact that are stored on a network computer, subsequently allowing them to then click on button to automatically open that document. Horizon will continue to explore further functionality that will automate the path field entry. For now, users will need to type the path in manually.

Enhancement – Proposal/Areas & Products/Product Display
The Product information shown in the Product Portal has been arranged in a more logical order to indicate Discipline Sort and Product Sort precedence. Product Description has also been added to this screen.

Enhancement – Proposal/Areas & Products Report – Product Sort
When the Print Preference has been set to "not show" product disciplines on the Areas & Product report, the products now sort by Sort placement, then Make and then Model.

Enhancement – Proposal Product & Project Work Order Display SKU
If a Product record has a SKU number attached to it, then it will be displayed along with the Model number, on all Proposal screens. The SKU will also appear on the Work Order screen, as well as on the printed Work Order.

Enhancement – Proposal Extra Text Pages – Increase Size to Five Pages
The Master Preferences, Proposal Preferences and Printed Proposal Extra Text Pages have all been increased to allow a new maximum length of five pages.

Enhancement – RCMS Users/Pop Lists for City, State and Zip
Pop-Up lists have been added to the Contact Detail and Proposal Client Detail screens that contain City, State and Zip values. This enhancement is only new for RCMS users, as the functionality already existed for all other users.

Enhancement - Sound Components RCMS Import
Two new import utility facets have been added to the system for Horizon's RCMS users:

Product Library/Utility/RCMS Import: RCMS Product import utility button for Sound Components that will retain the description in caps.

Master Prefs/Bookkeeping/RCMS/Auto Update: Sound Components have been added to the Events plug-in that automatically imports RCMS Products at timed intervals.

Enhancement – Proposal Module: Enable Print Dialog for Mac Users
When printing reports in the Proposal module, a pop up menu will pop up for Mac users only.

*****Fix – Critical Fix - Deleting Proposals when editing Supplements Proposal/Supplements/Edit Supplements*****
Under certain conditions, when users clicked on the blue "Edit Supplements" icon on the Proposal Supplements screen and then clicked back on the Areas tab, the entire Proposal was being deleted. This has been fixed. (whew!)

Fix – Master Project/Fees Subtotal
The Fees Subtotal on Master Projects (Projects with Change Orders) now correctly adds up the Fees total of the Original Project and the sum of all the Change Order Fees.

Fix – Proposal Payments & Phase Director Upgrade
Proposal Payments and Installation Phase labels and all settings are now separated from the Master Preferences settings so that changes in the Master Preferences Payment and Install screen do not affect existing Proposals or Projects.

Fix – Proposal and Project/ Client email address
The client email address is now correctly displaying on the Proposal/Client Detail screen, as well as on the Printed Project/Installation Work Order. This email address is also correctly updated in the Proposal/Project if the user elects to change the email address on the Contact.

Fix – Proposal/Shop Reports: Product Summary
This report has been reworked to show total quantity of like kind items and subtotals.

Fix – Proposal/Shop Reports: Areas & Products Summary reports
These reports now properly summarize products within each area.

Fix – Proposal/Shop Reports: Staging Reports - Parts
These reports now properly show Parts.

Fix – Follow Letter Module: Completed Projects Display
Setting the Entity type field to Completed now properly displays all of the Completed Projects in the portal.

SCPS Version 4.12
Released: 3/28/2006

Enhancement – Original Project, Final Change Orders and Master Project Posting

The Totals on Master Projects (those with Finalized Change Orders) now correctly reflect the sum of the Original Project, plus the total of all the Finalized Change Orders. SCPS has been enhanced to include the Fees being based on a percentage of the totals now posted on the Original Project **and** the Finalized Change Orders. These totals are then added together for the Master Project. During the upgrade process all of your projects will be automatically updated and posted. You will then be able to see the all of the Original Project, Final Change Orders, and Master Project totals on the Master Project Pricing screen for easy reference.

Special Note: In order to take advantage of the benefit of this new functionality, this upgrade grooms existing historic Master Project and Finalized Change Order data during the upgrade process. This process increases the time it takes to upgrade, potentially by as much as an hour or more, if you have dozens of Projects and Change Orders. **You may want to upgrade before or after hours, because it will take more time.** You may only see a blank screen on your computer until the upgrade is completed. Do not be alarmed, and please be patient. It is very important that you do not interrupt the upgrade process until it has been fully completed.

Enhancement – Master Project /Utility: Toggle Master & Original Project

This utility will "disconnect" all of the Projects from all of the Finalized Change Orders in a Master Project and then allow the user to reconnect them again. A message will appear on screen to indicate when you are in the "disconnected mode". This provides the user with the opportunity to see the Project details prior to any Finalized Change Order activity.

Enhancement – Master Prefs and Proposal Fees

The description text display fields have been lengthened on all Fees screens. The Fees descriptions can now be viewed in Projects as well.

Enhancement – Projects & Finalized Change Orders

Access to additional View screens such as Fees and Overviews

Enhancement – Proposal/Project Utility: Change Proposal numbers

This administration utility enables you to change the proposal numbers on existing proposals. Proposal numbers do not have to be unique in SCPS to function properly, but keeping them unique is better from an organization standpoint, to this feature should be used with discretion.

Fix – Proposal / Pick Product / View Product Detail: Pick Pencil
Occasionally when picking a product for a Proposal and then viewing the product

Fix – Master Prefs/Proposal/Overviews: Deletion
When deleting an Overview from the Master Prefs / Overviews screen, that Overview was being deleted from all existing Proposals and Projects. This has been corrected.

Fix – Master Prefs/Proposal/Overviews: Deletion
The act of picking products in a Proposal was occasionally deleting Overviews that were created specifically for that proposal. This has been corrected.

Fix – Change Orders: Proposal Warning Message
An erroneous Proposal Warning message had been appearing in the Change Order-Change Quantity screen, indicating that this is a Proposal and not a Project. This has been corrected.

Fix-Duplicating a Project: Switch Contact error message
An incorrect error message advising that "a Project and cannot be changed" was being encountered by users duplicating an existing Project to create a new Proposal. The message came up upon attempting to switch the Contact information in the newly created Proposal. This error message has been removed.

Fix-Proposal / Pick Product / View Product Detail: Pick Pencil
Occasionally when picking a product for a Proposal and then viewing the product detail in the Product Library, the "POS Pick Button" was erroneously displaying, rather than the correct "Pick Qty" field.

Fix-Proposal/Print Areas & Products/Sort Products without Disciplines
When Disciplines are not shown on the Areas & Products report, products now sort alpha numerically by Sort Code, Make and Model regardless of their Discipline.

SCPS Version 4.11
Released: 3/11/2006

Enhancement – Proposal/Product Detail/Labor
A new button has been added to the Labor portal to allow the user to add new Labor Types and time to an existing Product within a Proposal. The blank portal record that previously was used to add labor time, but didn't enable you to create a labor type for that time, has been removed.

Enhancement – Proposal/Payment Screen: Speed Improvement

The Phase Total fields on the Proposal Payment screen have been replaced with Phase Total buttons. Clicking on these buttons will calculate and display the Grand Total of the Proposal/Project Phases instead of displaying them all of the time. This will serve to increase the speed of navigation through this screen on large proposals.

Enhancement – Proposal/Project Detail Screen: Speed Improvement
The Labor Time Total and the Profit per Hour fields have been replaced on the Proposal Detail screen with buttons. Clicking on these buttons will calculate and display the totals instead of displaying them all of the time. This will serve to increase the speed of navigation through this screen on large proposals.

Enhancement – Master Preferences & Proposal Fees Sort
A Sort field has been added to the Master Preferences- Fees page. This will allow Fees to be manually sorted much like Areas and Products. A "Set Sort" button has also been added on the Master Prefs/Fees screen that allows the setting of all Fees Sorts to "m". You may want to consider this option so that Fees added to new Proposals will sort properly.

Enhancement – Proposal/Areas: Add Area Location
A new Location field has been added to allow entry of a blueprint location numbers (001), if needed. Proposals are sorted by Location Number, Zone Number, and then Area Name. This Location field also has an auto-incrementing feature to match the Zone field functionality.

Enhancement – Proposal/Print Menu/Shop: Staple up cards
Items classified as Parts can now be set to be included in the Staple-Up Card process.

Enhancement – Proposal/Areas & Products: Improvement of Screen GUI
The Areas and Products portal headers have been revamped to improve the ease of use and comprehension of the screens.

Enhancement – Product Library/Specs: New Field: Box Type
A new "Box Type" field can be used to indicate what kind of box a particular Product will fit into (i.e. Single Gang, Double Gang, etc.).

Enhancement – Proposal/Project: Entity Lock
This improvement to the Entity Lock system should minimize the need to manually Unlock an Entity when leaving a proposal or project using the Home button.

Enhancement – Project: View Areas, Text screens

You now have viewing access to the Areas & Products and Areas Text screens while in a Project. These screens are for viewing only and data cannot be modified.

Enhancement – Proposal/Product Quick View
Costs figures have now been added to the Product View screen.

Fix – Project/Work Order loop
There had been a program loop that caused entering the Work Order module to use up too much computer memory. This system behavior has been corrected.

Fix – Proposal/Print Menu: Contract Fonts
All of the Contract Subtotal font sizes have been modified so that they are now consistent in size.

Fix – Project/Pending Change Order
The Client Signature line has been relocated to the bottom of the Change Order, rather than at the top of the page.

Fix – Proposal/Areas & Products (Report file only)
The Product Qty field of this Report is now set to sum the quantity of like items.

Fix – Proposal/Wire Supplements: Wire Class
The Wire Classification field now displays properly in the portal.

Fix – Proposal/Shop Reports/Staging Report: Wire Class
The Wire Classification field now displays properly on this report.

SCPS Version 4.10
Released: 2/21/2006

Enhancement – Proposal/Project: Totals Speed Enhancements
Replace the Grand total fields on the Proposal Detail and Areas & Products screens with a Grand Totals button. Clicking on this button will calculate and display the Grand Total of the Proposal/Project instead of displaying it all of the time. This speeds up navigation through these screens on large proposals.

Enhancement – Proposal/Project: Change Qty-Speed Enhancement
Changing the Qty on a Product in a Proposal now only updates the Labor records for that Product instead of looping through all of the Labor records for that proposal, making the process much faster on large proposals.

Enhancement – Proposal/Project: Client Detail-Speed Enhancement
Leaving any of the 5 Client detail screen was updating the proposal payment amounts which takes time because it has to calculate all of the totals. This only happens now when leaving the Project screen (which has the Install Type and other fields that impact the payment plan), making it faster to leave all of the other screens when returning to the Proposal Area Detail screen.

Enhancement – POS: Work Order Change layout
The subtotals footer section of the Work Order, now appears at the end of the work order, instead of before the product listing. This enables the WO to appear on one page if there are no products added to the WO and improves the clipping of product information at the page breaks.

Enhancement – Proposal Areas & Products screen GUI enhancement
The Product Portals on this screen in Proposals and Change Orders has been improved to provide a clearer indication of the Placement Sort and Discipline for each product in the portal.

Enhancement – Proposal Areas Text screen GUI enhancement
The size of the Product Portal on this screen has been increased to show more products when an Area is selected.

Enhancement – Project Client Contact screen
Only allow contacts to Modified not Switched in Projects and Change Orders

Enhancement – Project Install screen
Only allow Installation Parameters to changed in Proposals and Pending Change Orders not in Projects or Finalized Change Orders

Enhancement – Project and Finalized CO - Product Screen
A new Product List "View Only" screen now enables you to view product details from within Projects and Finalized Change Orders. No modifications to these products can be made from this screen.

Fix – Master Tracker – Email Addresses
Occasionally the email address of a user was being incorrectly attached to a tracker task. This has been fixed.

SCPS Version 4.9v2
Released: 2/8/2006

Enhancement – Proposal/CO: Add a new Product Listing type
F1 Make-Model-SKU-Description-Finish

Fix – Project PO: Fix the Qty, Description, Ext Price and Total Price
The printed PO's now show the correct data for these fields.

Fix – Project CO: Remove developer fields and colors
Developer fields have been removed from the printed CO's

SCPS Version 4.9
Released: 2/7/2006

Enhancement – Proposal / Project Detail screen: Quick View Products and Contacts
A "Q View" button has been added in the upper right header (next to the Utility button) of the Proposal/Project Detail screen. This button enables the user to quickly view all of the Contacts in the system (with their phone numbers) as well as all of the Products in the Product Library. Users will only be able to **view** this data for quick reference from within a Proposal/Project and will be returned directly to the Proposal or Project originally being worked in. This should prove to be a very handy reference feature.

Enhancement – Proposal / Areas, Products, and Text Navigation
Users can now switch back and forth between the Areas, Products, and Text screens while staying in the Area originally selected. This makes adding products to the Area easier. After switching to either the Area or Text screens, the user can refresh that screen simply by clicking on the Area or Text tab on that screen.

Enhancement – Follow-up Letter Module
The interface for the Follow-up Module has been completely re-designed to provide improved ease of use and functionality. When Follow-up letters are printed, the print date is now stamped on the Proposal Portal so users can keep track of when specific letters were sent for each Proposal or Project. In addition, the Preferences / Follow-up module was also re-designed, incorporating separate tab pages / screens for each letter template.

Enhancement – Proposal / Project Com Log screen: Follow-Up Letters
While within a Proposal or Project, users can now access the Follow-up Letter Module directly from the Com Log. A new Follow-up Letters button has been added to the Communication Log (Com Log) screen to provide access to this feature. When Follow-up letters are printed, the print date is now stamped on

the Proposal Portal so you can keep track of when they were sent for each proposal and project.

Enhancement – Alternate Logo Screen Option - Beta
A new Main Logo screen layout has designed and made available as an option to users. This new layout has been added in an effort to have the menu more closely mirror the workflow of most typical operations. To access this optional screen, users can go to the "Preferences / Other/ Misc." screen, and select the option. Using this screen may take a little time to get used to at first, but we think it will become the preferred screen. We'd appreciate any feedback you may have to offer in this regards.

Enhancement – Project / Change Orders: Show Original Project Area Text
A new option has been incorporated into the software that will allow the user to show the Original Project Area Text in ***addition*** to the Change Order Area Text. This feature is now available as an option within Master Prefs /Other /Projects. (and in the Change Order Preferences screen for that CO)

Enhancement – Project / Pending Change Order / Areas & Product Screen
A new "No Prompt" button has been added to this screen which can help to streamline the Change Order process. When checked, users are enabled to add Areas to a Change Order without automatically being prompted to add Products to that area.

Enhancement – Project / Convert Project into a Proposal
Separate this Utility from the Convert Project to a Completed Project. Changing a Project back to a Proposal should only be done in an emergency because Change Orders will be disconnected and not restored.

Fix – Proposal / Areas & Products: Rename Area Trap
Users are now required to rename an Area when duplicating so that they cannot leave the name blank. This prevents Areas from not having a name, which occasionally could lead to incorrect system behavior.

Fix – Master Project / Print Menu / Areas & Products Report: Area Labor Subtotal
Area Labor subtotals now calculate properly if they contain Changer Order Products. The Subtotals for each Area will now add up to the Contract Labor total.

Fix – POS/Work Order: Printed form

The former clipping of the Appointment Day has been corrected, as was the previously misspelling of “Description”.

Fix – Proposal/Preferences/Contract
Connect the contract pop up labels to the Main Preferences pop up lists.

Fix – Proposal/Products/Discount Amount
If the List Price field is $0 then the Product Discount will be based on the difference between the original sell price and the discounted sell price as it is when the List Price field is blank.

Fix – Master Project/Purchase Orders: PO’s created for 0 qty items
If the items on a PO have no Qty to Order then those items are now not created in the PO Invoice. This now works properly with the Auto Set feature and the Staging Qty.

Fix – Project / Purchase Orders: Remove Zero Quantity
Any product on a Purchase Order that has a zero Quantity will no longer show on the actual Purchase Order. Example: If you have a product with a quantity of 3 and also of quantity of -3 (as the result of a Change Order) the net result for that product will be 0 and it will not show on the Purchase Order. These items will still appear on the “Purchase Orders –All Products” screen.

Note: *Horizon is continuing to develop and refine the functionality in this area. This change is an important step forward, and more refinements will be forthcoming.*

Fix – Custom User Proposal Reports Update
The areas and products proposal report now shows change order additions for all print configurations.

SCPS Version 4.8
Released: 1/24/2006

Enhancement – User Login Screen
Increase the number of Users showing in the User List to 25 to reduce the need to scroll through the list.

Enhancement – Project / Payments
A “Payment Notes” field has been added for each payment to log payment details such as check number, etc.

Enhancement – Proposal/Project Detail Screen: Change Work Order Button

The label on the Work Order button has been renamed “Installation.”

Enhancement –Project / Final Change Order and Sales Invoice Labels
Check boxes have been added in Master Preferences/Other/Project to turn off the Credit Card labels on the Final Change Order and Sales Invoice.

Enhancement – Project / Change Order/Product Detail: Spell Checker
A spell checker button has been added for the Change Order Product Notes field.

Enhancement – POS / Purchase Order: Auto Receive All Items
A new button has been added to the POS Purchase Order and will set the Received qty to the PO qty for all items on this PO.

Enhancement – Project / Change Order / Area Text: Change Order Status Indicator
A Change Order status indicator has been added next to each product in the Product Portal to show if a product has been either A=Added, D=Deleted, or C=Changed

Enhancement – Product Library / Product Detail: Pix-PDF
A new Pix-PDF tab page screen has been added. This screen provides three newly available Product Picture fields with user defined labels, as well as three new Product PDF fields, also with user defined labels. From this screen the user will be able to see all PDFs for a specific Product, and can access the PDFs for viewing with a single button click.

Enhancement – Product Library & Proposal / Product Detail: Specs
New Specification fields for Power Output, with multiple entries for Channels, Power, and Impedance have been added to the software.

Enhancement – Proposal / Product / Labor Detail: Labor Totals
Labor Time totals, as well as Degree of Difficulty totals have been added to the Labor Portal which shows the total labor time for each labor category. In addition, a connection has been added to the Adjust Labor Type and Labor Time routines to screens that enable you to change just those items.

Enhancement – Proposal and Product Library Products: “Do Not Discount” Option
A “Do Not Discount” check box has been added to the Product Library Detail screen. When checked, the system will not allow this product to be discounted when the Proposal Auto Pricing Adjustment feature is used. This “Do Not Discount” checkbox is also in the Proposal Product Detail and Line List screens so that it can be changed within a specific Proposal.

Enhancement –Product Library: Changing Groups Assigned to Products
Changing the Group assigned to a product in the Product Library will no longer require you to be the only user logged into SCPS. This is because the system will no longer automatically change the Group on the products in a Proposal. If you enter a Proposal that has products that have a different Group assigned to them in the Product Library than they do in the Proposal, you can go into the Utility screen on that proposal and click on the "Update Groups" button.
IMPORTANT: Groups on Products in Projects cannot be updated.

Enhancement –Proposal Detail Screen: Group Indicator & Utility
If the Group assigned to a product is different in the Product Library, than it is in a Proposal, there will be a blue indicator to the right of the Group. This indicator can be clicked on to update all Product Groups in the Proposal to the Groups in the Product Library. You can also use the "Update Product Groups" button in the Proposal Utility screen to do this same function. **IMPORTANT:** Groups on Products in Projects cannot be updated.

Enhancement – Proposal Reports that show Product Line Listings
Change the separator between the Make and Model from a "-" to a ":" which looks better and is more consistent with the onscreen display of line items.

Enhancement – Proposal/Product Detail/Labor: Show all Times and Prices
This Product Labor Detail screen now shows all Times with and without Degree of Difficulty, Unit and Extended Costs and Sell Prices, for all Phases including a grand total for each. In addition to these fields you can now view the Total Proposal Time and Amount from this screen so you can see the effects of changing a Products Labor Time on the entire Proposal.

Enhancement – Proposal/Client Detail: Tax Update
Remove the Tax Update button and incorporate the update into the Select Tax button.

Enhancement – Proposal/Pricing: Adjust Selling Prices based on $ Amt
Add a button to the Automatic Pricing Adjuster that enables you to enter a dollar amount (+ or -) and click a button that will adjust all of the products (except those with the Do Not Discount flag checked) by the percentage that the Adjustment Amount represents.

Enhancement – Project/Fees: View Fees screens
Separate the Fees screens (Project-Services-Expenses) into 3 screen for easier viewing and so that you don't have to scroll down the screen.

Enhancement – Project/PO/WO/SI: Screen Improvement
Reorganize all PO, WO, SI screen header buttons for better usability.

Fix – Proposal / Client Info: Navigation Tab
Prior to this release, navigating the system by clicking on the Client tab from the Install, Notes, etc. screen was bringing the user to the Pick Contact screen in Contacts, instead of to the Client screen in your Proposal. This may have inadvertently caused the incorrect contact to be assigned to that proposal by the user.

Fix – Proposal / Parts Supplements: Cost of Phantom Product – Parts
Parts Supplements that are assigned to Phantom Products now have their cost set to 0, which matches their default selling price. This is because the Cost and the Sell Price of the Phantom Product itself is the sum of the Supplement Parts assigned to it (not the product itself) By not deleting the cost price of these kinds of parts supplements, the Parts GP% was a negative value. By not putting the Parts Supplement Cost on the Phantom product itself, the Product GP% was off. These factors have both been corrected with this release.

Fix – Proposal/Multiple Labor Pricing mechanism
Enable any of the 3 labor tiers to be changed in any proposal.

Fix – Contact/Detail: County POP Up
Fix the Current and Future County field pop up menus

Fix – Proposal/Client: Modify Contact Name
Fixed the problem where modifying the contact info in a proposal would sometimes change the contact name on a different proposal or project.

Fix – Proposal/Project//Wire Manager: Auto Set Bulk Room Run lengths
Fix the Auto Set mechanism so that it updates all Room Run wires with the desired lengths. Also add the Default Bulk Wire Home and Room Run wire lengths to the header for easy reference.

Fix – Proposal/Print Menu/Areas & Products report: Blank bottom of page
Fixed the blank portion at the bottom of the page that occurred when selecting "Do not show Disciplines: option was selected as a Print Option.

Fix – Project/Client Install and Details screens: Block access from Projects

Block critical Proposal fields so that they cannot be changed in a Project or a Finalized Change Order.

SCPS Version 4.7
Released: 1/11/2006

Enhancement – Proposals/Multiple Labor Rates
You can now create and label 3 different labor rate modules in the Master Prefs/Labor. One of these can then be selected for a Client in the Contact Module. When you create a Proposal for that client the assigned labor rates will be applied to that Proposal. You can change the Labor Rate for any Proposal from the Installation screen or from the Pricing/Labor screen. This new feature enables you to apply different labor rates to a Proposal for different clients, builders or locations you sell into. Existing Proposals and Projects will be unaffected by this upgrade, except you will be able to change the Labor Rates on existing Proposals manually if you choose to.

Enhancement – Master Prefs/Tracker: Initial Project Tasks
Added a new module to the Project Tracker that enables you to define Tasks required when a Proposal is Converted to a Project. (Like notify the Project Manager etc). These tasks are in addition to the normal tasks that can be assigned to each phase of the Project.

Enhancement – Proposals/Contact: Salutation and Phone Ext. Fields
Contact Salutation and Phone Extensions have been added to the Proposal Contact info screen.

Enhancement – Project/Work Orders: Time and Date Fields
A field has been added to allow entry of an estimated install time to a Work Order (this can be used if install time is not added to products contained in the Work Order).

A new field has also been added to allow the user to enter a scheduled install date to the Work Order.

Product Library/More Views: Headers
The “More Views” screen headers have been modified to be more consistent with the “Main Line List View” headers.

Enhancement – Contacts/Line List Entities: View Entities buttons
An “Entities View” icon has been added to the Contact Line List. This view icon only shows if there are Proposal/Project or POS entities associated with that contact. If you click on this icon you go directly to the Entities Detail screen for

that contact. If you click on the underlined Entities header label you will get a list of all contacts that have Entities.

Enhancement – Contacts/Site Directions: Report
A new report that shows the site directions and map is available from the Contact Site Directions screen.

Enhancement – Project/Purchase Orders: Adjustable Product Phases
You can now change the Phase assigned to all products, parts and wire in the PO screen of a project.

Enhancement – Project/Work Orders: Install Notes
Add Install Notes from the client install screen to all Project Work Orders.

Enhancement – Project/Work Orders: Add Client Fax number
Add Client Fax number to the Work Order

Enhancement – Proposal/Print Menu//Shop: Product Summary Cost Report
Add a Shop Product Summary Report that shows products costs.

Enhancement – Proposal/POS Pick Contact: Better Info screens
The screen layouts in this area have been improved so that they are now more consistent with the Contact Detail screens.

Fix – Proposal/Product Detail: Tab Order
The tab order has been set on the pricing fields.

Fix – Master Tracker: Updating Install Dates
When updating installation phase dates in a project all related Tracker records are now updated properly.

Fix – Project/Utility: Convert Proposal Access Rights
The Access Rights for converting a proposal from the User Group Level have now been relocated to the Convert Proposal Access Rights check box in the Users Profile.

Fix – Project: Change Order Graphic Indicator
The Change Order graphic indicator has been relocated from the Prefs file to the OpenSCPS file so that it will not be affected during upgrades.

Fix – Project/Work Order Invoice: Installer names pop up
The Work Order Installer pop up menu now draws from the Prefs/Installer Initials list.

Fix – Project/Changer Order Invoices (Pending and Final): Font Size
Subtotal, Tax and Grand total numbers were set to 11 points and they should have been set to 10 point.

Fix – Project/Changer Order Invoices (Pending and Final): Unit Prices
Unit price fields now draw their numbers from the unit price and not the extended price.

Fix – Project/Tracker: Task Assignment Names
The correct Task Owners are now displaying if the manually set Task Owner is assigned to a task.

Fix – Project/Work Orders/Sales Invoices/PO's: Prev/Next buttons
The Prev/Next buttons have been fixed.

Fix – Project/Purchase Orders: Date field size
The "Received Date" field has been expanded in order to display entire date.

Fix – Project/Purchase Orders: Serial Numbers
The ability to enter multiple serial numbers to be entered and stored when receiving line items has been enabled. Click on the serial number display field on the Purchase Order line item to view all applicable serial numbers.

Fix – Project/Work Orders: (Locations)
Company info & Shop Logo on Work Orders now remains the same as when they were originally created, even if the User/Location logged in changes.

Fix – POS Invoices: (Locations)
Company info & Shop Logo on Work Orders now remains the same as when they were originally created, even if the User/Location logged in changes.

Fix – Proposals/Areas & Products and CO reports: Remove blank portion
The size of the Product Features & Benefits has been reduced to prevent blank portions from appearing at the bottom of these reports.