



SmartPartner Software

Automated Proposal & Project Management System

SCPS 2007 Revisions

New Features, Enhancements and Fixes

Fellow SmartPartners,

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

Electronic Design Associates, LLC
dba: Horizon Software
dba: Aktiv Music & Sound

(715) 287-3335 phone
(715) 287-4464 fax
horizon@triwest.net email
www.horizon-software.com website

Download this SCPS Upgrade from the SCPS/Preferences/Horizon screen in your SmartPartner software.

Download the Upgrade Help Guide

http://www.horizon-software.com/download/SCPS_Upgrade_Help_Guide.pdf

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.

SmartPartner Training:

If you need training on new enhancements just give Horizon a call at 715-287-3335 and book a time. SmartPartners receive a 25% discount off Horizon's normal support rates.

View past SCPS Revision History Documents

http://www.horizon-software.com/download/SCPSrevisions_2006.pdf

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

Special Notice: Please contact Horizon Software (before you upgrade) if you are upgrading from a version of SCPS prior to 5.0.

If you add a product to an area and then add pure supplements to that area (labor, part, wire pre and bulk) then when you duplicate that area the pure supplements don't get duplicated.

If we first add pure supplements to an area and then add a product (with supplements) those supplements do not show up in the supplements screens.

**SCPS Version 6.2
Released: 11/28/2007**

Enhancement – Improve both Windows and Mac screen management.

All database windows have been improved so that they open to your full computer screen on a Windows computer and to the SCPS screen size for Mac.

Enhancement – Speed up Favorites in all Modules

Selecting Fav A, B or C in the Proposal/Project List, Product Library, Text Library and Contacts finds those Favorites much faster than previous versions.

Enhancement – Proposal/Supplements: Pop up list filter by Zone

Add Zone to the Area Pop Up list that enables you to select individual Zone – Areas for viewing in the Labor, Parts, Wire and Task Supplement screens.

Enhancement – Project/Work Orders: Properly Display Areas

Automatically set Wire and Part Keys and a new Line Item legacy data routine to insure that all Areas show up on all Work Orders.

Carriage returns in Area names are now being automatically stripped out of the Work Order reports so that all Areas will show up on Work Orders.

Enhancement – Project/Change Orders: Print Options & Preferences

The Print Reports button provides access to all Reports, Print Options and Print Preferences for Pending and Final Change Orders.

Pending Change Order - Print Menu Options		Print CO	? Home
John & Mary Smith Home Entertainment System 1284.1c1-1.100	Change Order	Done	
	Overviews	Print Reports	
	Fees & Services		

Enhancement – Project/PO: User PO Number

Users can now enter their own User PO number and it will be added to the SCPS generated PO number. The user number will show up on the PO and on the Master Project/PO List screen.

Delete PO Pick Vendor		Purchase Order Detail
PO Number 1079 - 1285.1-1.100		Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA Phone: (W) 904-645-5242 Fax: 904-645-7275
User PO # 12345		
PO Date 11/9/2007		
Posted Date 11/9/2007		

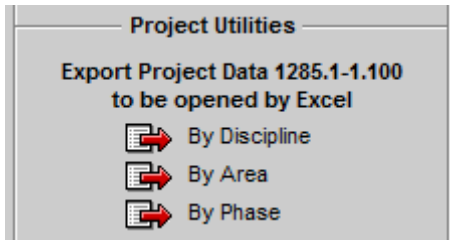
Enhancement – Project/Print Menu/Shop: Print Products with Serials

New Reports show Product Serial Numbers captured when receiving products on Project Purchase Orders and selling products on Sales Invoices.

Product Serial Numbers	
	Purchase Order Products with serial numbers
	Sales Invoice Products with serial numbers

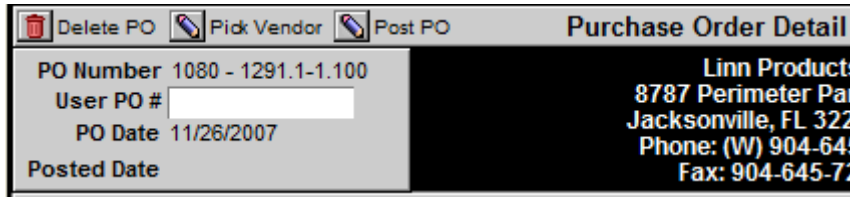
Enhancement – Project/Print Menu/Shop: Export to Excel

Compete Project Data including Change Orders and All Areas, Products, Labor, Parts and Wire will can now be Exported to a file which can be opened by Excel. Instructions will pop up when you click on an Export button. This report can be organized by Discipline, Area or Phase.



Enhancement – Project/PO & Sales Invoices: Post without Printing

You can now post (finalize) a PO without Printing it using the Post PO (SI) button.



Enhancement – Project Manager/Global PO's : Sort Order

You can now sort by PO Date in Ascending or Descending Order by clicking on the underlined PO Date header label or the SCPS/User PO number.

Global Purchase Orders						
View of all Issued PO's						
<u>SCPS PO</u>	<u>User PO #</u>	<u>QB Invoice #</u>	<u>PO Date</u>	<u>Vendor</u>	<u>PO Total</u>	<u>Project #</u>
1078			9/13/2006	Linn Products	\$234.00	

Enhancement – Project/PO/Invoice: Buyer Override

You can now override the default PO Buyer name with a Buyer from your User List specifically for any given PO using the Buyer Override field.

Delete PO Pick Vendor Post PO		Purchase Order Detail	
PO Number 1081 - 1291.1-1.100 User PO # <input type="text"/> PO Date 11/26/2007 Posted Date 11/26/2007		Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA Phone: (W) 904-645-5242 Fax: 904-645-7275	
Special Notes <input type="text"/>			
PO Terms <input type="text"/>		PO Shipping <input type="text" value="Best Way"/>	
Buyer Override <input type="text" value="Joel Roberts"/>			

Enhancement – Project/Tracker: Delete Tasks

You can now enter the Project/Tracker/Project Tasks screen and Delete Tasks that are not appropriate for this Project. These Tasks will also be Deleted from the Master Tracker which stores all Tasks for all Projects.

You can also check this box in Master Prefs/Tracker/Tracker Setup if you wish to always go to the Project Tracker – Task & Cues screen when converting a Proposal into a Project.

☒ Go to Project Tasks screen when converting a Proposal into a Project

Project Tracker - Tasks & Cues						
Joel Roberts						
Install Phases	Payments	Project Tasks	1291.1-1.100			
View by Phase			All	Project Tasks		
Done	Phase	Date Due		Task	Task Type	Description
<input type="checkbox"/>		7/30/2007		<input type="checkbox"/> Send letter to subs	Followup	Use follow-up r
<input type="checkbox"/>		7/30/2007		<input type="checkbox"/> Project Management Notice	Project Mgmt	Notify Managen
<input type="checkbox"/>	1	8/19/2007		<input type="checkbox"/> Purchase Prewire	Purchasing	Create PO's for
<input type="checkbox"/>	1	8/24/2007		<input type="checkbox"/> Wire Drop Schedule	Documentation	Print Wiring Cha

Enhancement – Master Prefs/Groups: Portal Filter by Discipline

You can now select a single Discipline to show up in the Group portal or Show All Groups by clicking on the Discipline – Show all button.

Automation : Control : Keypad			
Pick	Discipline	Category	Type
	Automation	Control	Accessory
	Automation	Control	Controller
	Automation	Control	Keyboard
	Automation	Control	Keypad
	Automation	Control	Occupancy Sensor
	Automation	Control	Panel/enclosure
	Automation	Control	Switch/sensor
	Automation	Control	Switcher

Group Navigator

Discipline - Show All

Automation

Up First

Down Last

First Group 1

Go to Last Selection

Use Last Selection

Enhancement – Product Library/Groups: Portal Filter by Discipline

You can now select a single Discipline to show up in the Group portal or Show All Groups by clicking on the Discipline – Show all button.

Automation : Remote : Handheld Remote Control			
Pick	Discipline	Category	Type
	Video	Display	DLP Video Projector
	Video	Display	LCD Flat Screen Tv
	Video	Display	LCD Projector
	Video	Display	Plasma TV
	Video	Display	Rear Projection TV
	Video	Display	Three Gun Projector
	Video	Display	TV GT 27 Inch
	Video	Display	TV LT 27 Inch

Group Navigator

Discipline - Show All

Video

Up First

Down Last

First Group 1

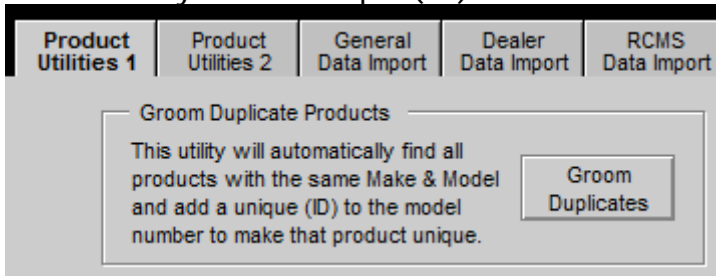
Go to Last Selection

Use Last Selection

Enhancement – Product Library/Utility: Groom Duplicate Products

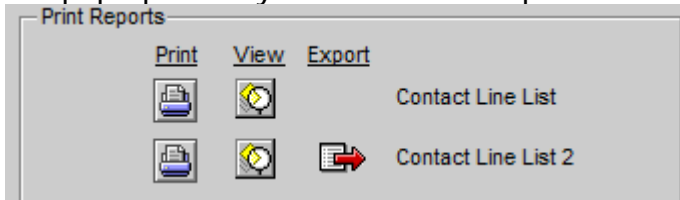
You can now automatically modify duplicate Product Model numbers so that each Make & Model in your Product Library is unique.

During the upgrade process, SCPS checks for duplicate products and automatically adds a unique (ID) to their model number as well.



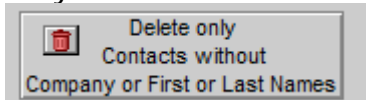
Enhancement – Contact/Print Menu: Export Data to Excel

Export Contact Line List report to a file that can be opened by Excel. Instructions will pop up when you click on the Export button.



Enhancement – Contact/Utility: Auto Delete blank Contacts

Automatically Delete All Contacts without First or Last Names or Company Name. Only Contacts with all of these fields being blank will be deleted.



Enhancement – POS/All Invoices & Quotes

A new Show/Hide feature will Show or Hide the Contact Second Address on your Invoices along with the Address Label that has been assigned to that address in your Contacts.

This 2nd Address and Label can be modified using the Setup button on these screens.

The screenshot shows a software window titled "POS - Sales Invoice" with a "Print Set" button. Below the title bar is a black header with the word "Invoice" in white and "SI #6990" below it. The main area is divided into two sections. On the left, there is a list of numbers: "4249", "9-4251", and "534". On the right, there is a section titled "Project Site" with a "Show" (selected) and "Hide" radio button. Below this, the address "Peter & Alison Menkes", "235 Warren Road", "Toronto, ONT M4V 2S6", and "PO#235-0021" is displayed.

Enhancement – POS Module: Improve Pick Product process

Picking products into Quotes, Invoices, Work Orders and Purchase Orders has been redesigned for better reliability and is not dependant on Product Make & Model or influenced by duplicate products (which you should not have, but occasionally happens in the Product Library).

Enhancement – POS/Sales Invoices: Increase Payment fields to 5

Provide more fields for storing client payments. The total of all these payments shows up in the Subtotal section of the Sales Invoice.

Description	Payment Amt
11/8/07 Ck#521	11,397.27

Fix – Project/Invoicing: SCPS Estimate to Quickbooks Tax

Estimates automatically created in QB now display each line item as Non Tax so that the total tax of the Estimate will be based on the SCPS tax.

All Users should make this modification to their Quickbooks software.

Current Users should change their Sales Tax Item in Quickbooks so that the Tax shown in QB will be properly displayed.

Open the Item List

Rename current Sales Tax Item to "old"

Item List

Edit Item Type a help question Ask How D

Type
 Sales Tax Item Use to calculate a single sales tax at a specific rate that you pay to a single tax agency.

Tax Name
 SCPS Sales Tax old

Description
 Sales Tax

Tax Rate (%) Tax Agency
 0.0% State Sales Tax

Open the Chart of Accounts
 Create a new Sales Tax Account

Chart of Accounts

New Account Type a help question Ask How D

Type Other Current Liability

Name SCPS Sales Tax Payable

☒ Subaccount of Sales Tax Payable

Description

Bank Acct. No.

Opening Balance as of 11/27/2007

Open the Item List
 Create a new Sales Tax Item
 Be sure to set the Account to the Sales Tax Payable:Subtotal

Item List

Name	Description	Type
New Item <input type="text" value="Type a help question"/> <input type="button" value="Ask"/> <input type="button" value="How Do"/>		
Type <div>Service <input type="button" value="v"/></div> <div>Use for services you charge for or purchase, like specialized labor, consulting hours, or professional fees.</div>		
Item Name/Number	<input type="text" value="SCPS Sales Tax"/>	<input type="checkbox"/> Subitem of <input type="text" value=""/> <input type="button" value="v"/>
<input type="checkbox"/> This service is used in assemblies or is performed by a subcontractor or partner		
Description	<div><input type="text"/></div>	<div>Rate <input type="text" value="0.00"/></div> <div>Tax Code <input type="button" value="v"/> Non</div> <div>Account <input type="button" value="v"/> Sales Tax Payable:S...</div>

Fix – RCMS: Project Pump Up: Check for Salesmans number

When pumping up Project details into RCMS when converting a proposal to a project, we now check to make sure there is a salesman's number assigned to the project. An error message will warn if there is no salesman's number.

Fix – Proposal(Project) List/Find Proposals (Project): Find by Salesman

Finding proposals and Projects by Salesman's name now works properly.

Find Projects

<input type="button" value="A"/>	<input type="button" value="B"/>	<input type="button" value="C"/>	<input type="button" value="D"/>	<input type="button" value="E"/>	<input type="button" value="F"/>	<input type="button" value="G"/>	<input type="button" value="H"/>	<input type="button" value="I"/>	<input type="button" value="J"/>	<input type="button" value="K"/>	<input type="button" value="L"/>	<input type="button" value="M"/>	<input type="button" value="N"/>
<input type="text" value="Fav A"/> <input type="text" value="C"/> <input type="button" value="Projects"/>													

Fix – Contact/Entities: Change Orders & POS Totals

Fix Change Order & POS Entity Totals

Contacts - Entities

Mike & Jessica Potter

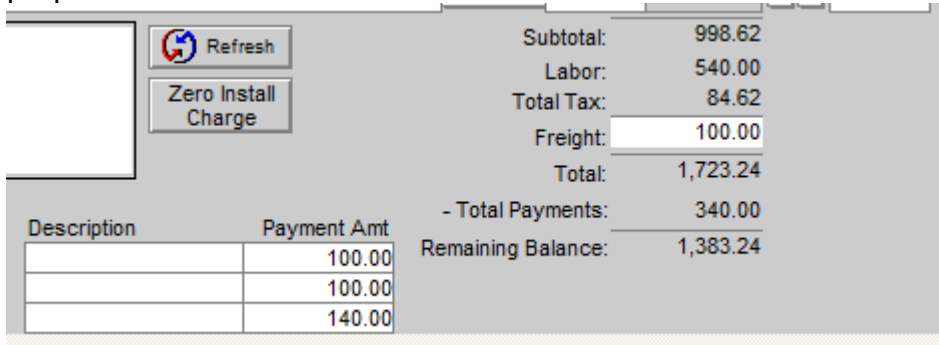
Contact	Notes	Entities	Other Info	Transactions	Tracker
Proposals - Projects - Change Orders - Completed Projects - Archived Proposals					
View	Entity Kind	Number User	Title	Created	Total
<input type="button" value="v"/>	Original Project	1285.1-1.100	Home Theater System	9/12/2006	\$30,646.68
<input type="button" value="v"/>	Completed	1287.1-1.100	Commercial Security System	9/12/2006	\$17,952.49

Fix – Product Library/Product Detail: Duplicate Validation

When entering a Model number on a product in the Product Library you will now be properly notified with that Make & Model number already exists and you will be able to change it to a unique number.

Fix – POS/Sales Invoice: Totals

Subtotals on POS Sales Invoices have now been corrected so they display in the proper order and amounts



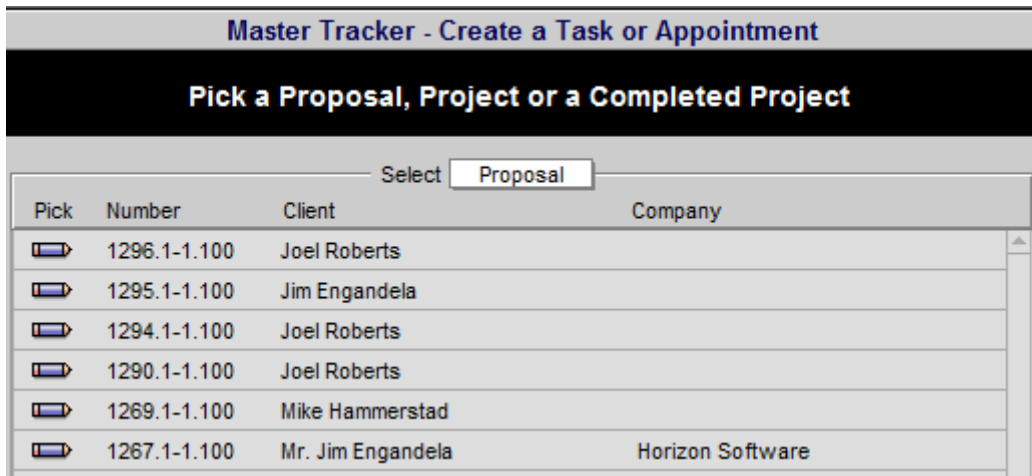
The screenshot shows a POS/Sales Invoice interface. On the left, there are two buttons: 'Refresh' (with a circular arrow icon) and 'Zero Install Charge'. Below these is a table with two columns: 'Description' and 'Payment Amt'. The table contains three rows of data. To the right of the table, there is a summary section with the following values: Subtotal: 998.62, Labor: 540.00, Total Tax: 84.62, Freight: 100.00 (highlighted with a blue border), Total: 1,723.24, - Total Payments: 340.00, and Remaining Balance: 1,383.24.

Description	Payment Amt
	100.00
	100.00
	140.00

Subtotal: 998.62
Labor: 540.00
Total Tax: 84.62
Freight: 100.00
Total: 1,723.24
- Total Payments: 340.00
Remaining Balance: 1,383.24

Fix – Master Tracker/Add Task or Appointment

When Adding a Task or Appointment and selecting a Proposal/Project/Completed/Archive from the pop up list, the portal now shows the correct entities.



The screenshot shows the 'Master Tracker - Create a Task or Appointment' screen. At the top, there is a title bar with the text 'Master Tracker - Create a Task or Appointment'. Below this is a black bar with the text 'Pick a Proposal, Project or a Completed Project'. Underneath, there is a 'Select' dropdown menu with 'Proposal' selected. Below the dropdown is a table with four columns: 'Pick', 'Number', 'Client', and 'Company'. The table contains six rows of data.

Pick	Number	Client	Company
	1296.1-1.100	Joel Roberts	
	1295.1-1.100	Jim Engandela	
	1294.1-1.100	Joel Roberts	
	1290.1-1.100	Joel Roberts	
	1269.1-1.100	Mike Hammerstad	
	1267.1-1.100	Mr. Jim Engandela	Horizon Software

SCPS Version 6.1v2
Released: 10/24/2007

Fix – Proposal/Print Menu/Areas & Products: Product Descriptions

Remove the doubled Product Model number/description on each line item in the Proposal Area & Products report.

SCPS Version 6.1
Released: 10/16/2007

Enhancement – Proposal/Product Detail/Parts Detail:

You can now change the Part Qty directly on this screen for both current and newly added parts.

Enhancement – Proposal/Add Pure Supplements: Select Area Trap

An Area must now be selected when adding a Pure Labor, Part or Wire Supplement to a Proposal.

Enhancement – Product Library/RCMS Import for Definitive.

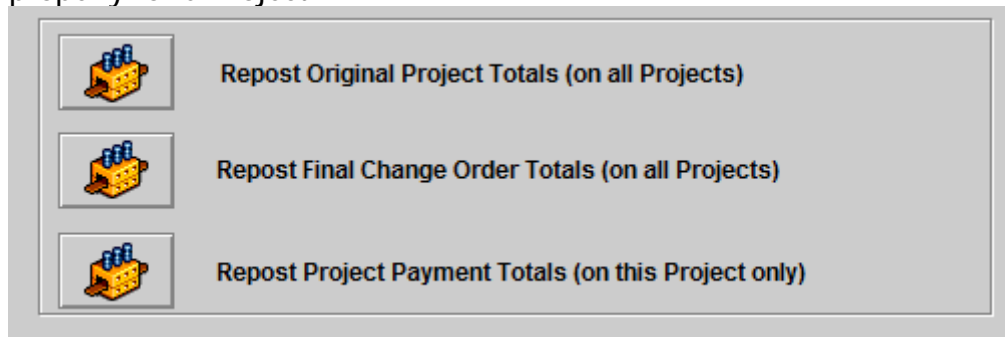
Change Definitive's RCMS product import to include the RCMS Product Descriptions.

Enhancement – Project/WorkOrders: Increase Install & Location Fields

Both the Product Install Notes and Location fields have been increased to 10 lines on the printed work order.

Enhancement – Project/Utility: Add Re-Posting Routines

These utilities will repost Project Totals, if necessary, so that they display properly for a Project.



Fix – Proposal/Supplements: Labor-Parts-Wire Totals by Area

Correct the displayed totals when viewing only one area in the Labor – Parts – Wire portals.

Fix – Proposal/Areas & Products: Pick Products CO Message Error

When picking a product after adding a pure supplement to an Area, an error message would pop up indicating that you are in a Change Order, which has been corrected.

Fix – Proposal/Product Option Display: Show Option Prices

Properly display the option price in the Product Listing field on the Product Detail, Product Line list and Proposal Detail screens. Display Product Description in the Areas and Products screen.

Fix – Proposal/Project/Line List: Sort order icon

Store the graphic for the sort orders in the Open_SCPS file instead of MainPrefs so that it won't be affected during the upgrade process.

Fix – Proposal/Project: Converting a Project into a Proposal

When converting a Project into a Proposal the Payment terms are now retained. A new Repost Payment Amounts button has been added the Utility/Admin Utility screen for repaying Proposal or Project Payment Amounts.

Fix – Proposal/Entity Lock: When leaving Areas & Products screen after viewing a Product Supplement.

The Entity Lock is now properly cleared when using the Home button after viewing a Product Supplement.

Fix – Project/Tax Summary: Tax Total

Correct the displayed total tax when a Project has Finalized Change Orders and A & B tax rates.

Fix – Follow-Up Letters: Preview Letters: Remove User "Cancel" button

When previewing a Letter the "Cancel" button is no longer available. The Continue button remains so users can return to the Print menu.

Fix – Follow-Up Letters: Print Related Contact Notification Letters

Printing Related Contact Letters now previews and prints the correct Followup-Letter.

Fix – Follow-Up Letters: Print Related Contact Mailing Labels

Printing Related Contact Labels now previews and prints the correct Mailing Labels.

Fix – POS/Sales Invoice, Consultation and Work Order: Grand Totals

The Grand Total Price of these POS invoices is now correct for all conditions.

**SCPS Version 6.0v2
Released: 9/20/2007**

Fix – Proposal/Supplements: Edit button

All Supplement Edit buttons now go directly to the Product screens for that supplement.

SCPS Version 6.0v1
Released: 9/20/2007

Fix – Project/Purchase Orders: Receiving products

Receiving products on a PO now receives on the correct product instead of always receiving on the first product in the PO.

SCPS Version 6.0
Released: 9/18/2007

Enhancement – Project/Invoices: (SI, PO's, WO's) Sum Items

This is big! Each screen has a Proj/Sum button so that you can switch between viewing all of the Items in a Project (including Change Orders) or just the Sum of all Items that have a positive quantity.

In the **“Proj” mode** you can see each item in the Project showing the Zone Area, CO Status and CO number.

All Phases		Phase 1		2	3	QB Estimate		Sales Invoice - All Products				PO	WO	
Paulett Norby						Amount Remaining To Invoice			Left to Invoice		Labor Left			
1304.1-1.100						Project Total \$5,472.83			Products 3		7:15:00			
						Total Invoiced			Parts 3		(hrs:mn)			
SI Products						SI Parts			SI Wire		SI Labor		SI Fees	
						Amt to Invoice \$5,472.83			Wire 151		Fees Left 2			
Phase						Proj		Sum						
	Zone - Area					Make : Model Description		Finish Status		Unit Sell		Proposal Sold		
	3 Atrium					Linn : 5101 Personal Handset Universal learning remote		Black C		\$1,170.00		3 ea		
	3 Atrium					Linn : 5101 Personal Handset Universal learning remote		Black D c1		-\$390.00		-1 ea		
	3 Balcony					Linn : 5101 Personal Handset Universal learning remote		Black A c1		\$390.00		1 ea		

In the **“Sum” mode** you only see 1 item with the Sum of the Qty for each item.

Because these items can come from several Zone-Area's the Zone-Area, the CO Status and CO Number is not shown, except on Work Orders where the Items Sum by Area & Zone, because this is necessary for issuing Work Orders.

This new **Sum mode** enables you to create Invoices, PO's or Work Order's for only those like kind items with a positive quantity.

<div> <div>All Phases</div> <div>Phase 1</div> <div>2</div> <div>3</div> <div>QB Estimate</div> </div>					Sales Invoice - All Products			PO	WO
<div> <div>Paulett Norby</div> <div>1304.1-1.100</div> </div>					<div>Amount Remaining To Invoice</div> <div>Project Total \$5,472.83</div> <div>Total Invoiced</div> <div>Amt to Invoice \$5,472.83</div>		<div>Left to Invoice</div> <div>Products 3</div> <div>Parts 3</div> <div>Wire 151</div>		<div>Labor Left 7:15:00 (hrs:mn)</div> <div>Fees Left 2</div>
<div> <div>SI Products</div> <div>SI Parts</div> <div>SI Wire</div> <div>SI Labor</div> <div>SI Fees</div> </div>					<div> <div>Proj</div> <div>Sum</div> </div>				
Phase	Zone - Area				Make : Model Description		Finish Status	Unit Sell	Proposal Sold
	3				Linn : 5101 Personal Handset Universal learning remote		Black	\$1,170.00	3 ea

Viewing these screens in the Sum mode is the default condition unless you set the Master Prefs/Other Defaults/Projects to "Show All Project Items".

Of course you can switch between the "Proj" and "Sum" mode at any time from any Product, Parts, Wire, Labor or Fees screen on any Sales Invoice, Purchase Order or Work Order.

Master Prefs - Other - Projects					
Projects	Products 1	Products 2	Counters	Misc	3rd Party
<div> <div>Invoices, Work Orders, Purchase Orders Screens</div> <div>Show All Project Items or Show Only Sum Items</div> <div> <input type="checkbox"/> Go to the Project Show All Items mode when entering the Project SI, PO & WO screens. Otherwise go to the Sum Items mode. </div> </div>					

Enhancement – Project/PO's, WO's and Sales Invoices: Auto hide supplement records.

When creating pure supplements in a proposal (labor, parts or wire) a place holder record named Supplemental : Items is created. This record is now hidden on the PO, WO and SI screens, but the actual labor, parts and wire record show. This makes it easier to issue PO's, WO's and SI's.

Enhancement – Project/Work Orders:

-New WO's to Date

The layout of the Qty fields on the WO screen have been re-arranged for easier comprehension so that you can see the progress of WO's to date.

Average Install Time

The Average Install Time is now displayed for each item, which should help you re-adjust the Labor time on Product in your Product Groups and Product Library.

All Phases		Phase 1		2	3	Wire Mgr	Install Work Orders - All Products					PO	WO	SI	?		Home
Mister Joel Roberts							Labor Time Remaining on Project		Qty	Left To Install	On WO's	Create WO		Leave			
1306.1-1.100							Project Time 12:05:00		Products	2	2						
							Installed Time 4:31:00		Parts	4		Auto Set		View			
							Labor Time Left 7:34:00		Wire	453		Qty to Install		Work Orders			
WO Products		WO Parts		WO Wire		Proj	Sum										
Phase	Zone - Area		Make : Model Description		Finish Status	Qty Sold	Left to Issue	Qty to Issue	Qty Issued	Qty Installed	WO's to Date		Total Time	Left to Install	Left to Complete		
	3 Atrium		Linn : 5101 Personal Handset : Universal learning remote		Cherry	3 ea	0		3	2	3:01:00		1:30:30	1	1		
	3 Attic		Linn : 5101 Personal Handset : Universal learning remote		Black	1 ea	0		1		1:30:00		1:30:00		0		
	3 Basement		Linn : 5101 Personal Handset : Universal learning remote		Black	1 ea	0		1					1	1		

Enhancement – Project/PO's and Sales Invoices: Auto delete unposted

When leaving the PO list screen or the Sales Invoices list screen all unposted invoices will be automatically deleted.

Enhancement – Project/Invoices: Pricing Discrepancy notice

Because in the past it was possible to delete a product in a Change Order with a different price than the original product, we now have a Notice at the top of the Project/Invoicing screen that shows the total of these products. If you see this notice in red then you can view all of the products (in the Project Mode) and correct them.

Speakercraft : AIM-LCR Three center channel : 2 X 5.25" woofer & 1" tweeter	White C	\$500.00	3 ea
Speakercraft : AIM-LCR Three center channel : 2 X 5.25" woofer & 1" tweeter	White D c2	\$425.00	-3 ea

Enhancement – Project/Change Orders: Negative Qty price trap

You now cannot accidentally delete a product on a CO when the price of the deleted product is less than the original price. You must first delete the product at the same price as the original and then add on new product with the new price. This maintains the integrity of the audit trail for Change Order items.

Enhancement – Project/Print Menu/Shop Reports: Staging Doc Areas

The Staging Document now has the Zone Area on each Product.

EME Audio & Video Systems - Confidential Report									
Staging Document									
Joel Roberts									
Home Entertainment System									
1291.1-1.100									
9/3/2007									
Page 1									
Phase-Class	Qty	Make-Model-SKU-Finish-Description	Ck	InStock	OnOrder	Date	Initial		
2 Trim	3 ea	Linn : Knekt RCU : White	Order	<input type="checkbox"/>					
Product		Knekt room control unit	Re'vd	<input type="checkbox"/>					
Linn			Stock	<input type="checkbox"/>					
		Bathroom 3	Delivered	<input type="checkbox"/>					
#									
2 Trim Trim	3 ea	Linn : Aktiv Modules :	Order	<input type="checkbox"/>					
Part		Stereo or twin mono Aktive crossover	Re'vd	<input type="checkbox"/>					
			Stock	<input type="checkbox"/>					
		Bathroom 3	Delivered	<input type="checkbox"/>					
#									

Enhancement – All Modules: Checkbox Delete Feature


All modules now incorporate the Checkbox Delete feature that enables you to check multiple items to delete and then click on the Delete Icon to delete them all at one time. The Delete Checkbox and the Delete Icon are all subject to User Rights for each User from the Master Prefs/Users/Access Rights screen.

This feature should make it easier for you to groom your Proposals and Projects to keep SCPS as efficient as possible. Delete all that is not necessary or old.

Modules with the Delete Checkbox feature:

Proposals - Projects - Completed - Archives - POS

Products - Sets - Text - Letter - Contact - Info

Product Library - Line List						Utility	?	Home
						Other Views	Inventory Control	Leave
						Phan	Lab	Auto Tag
						Part	Wire	Show Hidden
						Product Sets		
						Print Menu		
Make	Model : SKU	Description	Finish	Sell Price (Installed)	Fav Hide			
Linn	5101 Personal Handset	Universal learning remote	Black	390.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linn	5103 System Controller	Linn 5103 inc DTS, no RF		5,500.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linn	5110-W	Pair of on-wall	White	325.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linn	5125	Five channel power	Silver	2,750.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enhancement – Project/Payments: Create Total Payment Invoice

You can now create an invoice for the Total of the Project with this new button.

Original Project - Payment Terms				Print	?
Mike & Jessica Potter				Done	
Home Theater System 1285.1-1.100				View All	Change Orders
Payment Terms					
Payment	Phase 2 Payment	Phase 3 Payment	Holdback		
Payment 1	Payment 2	Payment 3	Hold Back		
Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.		
Original Project					Totals
\$194.00	\$6,129.34	\$9,194.00	\$3,064.67		\$30,646.68
2/2006	11/1/2006	12/1/2006	3/21/2007		
Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Total Pymt Amt	

Enhancement – Project/Add Change Order Numbers

Proposal Detail Screen now displays the Change Order numbers on items.

Discipline	Area	Phase	Master Project - Detail by Area			▼	▲	▴	Q V
Client	Areas	Fees	Mike & Jessica Potter Home Theater System 1285.1-1.100					Pricing	
Project	Products	Area Text						Payments	
Com Log	Supplements	Overviews						Change Orders	
								Profit per Hour	
Discipline : Category : Type			Status	Qty	Make : Model	Description			
Home Theater System									
Zone 1 - Home Theater									
Audio : Amplifier : Multi-channel			C	1 ea	Linn : 5125	Five channel power amp			
Audio : Amplifier : Multi-channel			A c1	1 ea	Linn : 5125	Five channel power amp			
Audio : Speaker : Bookshelf				5 pr	Linn : Katan	Bookshelf loudspeakers:			
Audio : Speaker : Powered Subwoofer				1 ea	Linn : Melodik	Aktive isobarik bass ext			
Video : Display : DLP Video Projector			C	1 ea	Runco : CL-610	DLP Projector			
Video : Source : DVD Player			C	1 ea	Sony : DVP-NS999ES	Progressive Scan DVD I			
Video : Source : DVD Player			A c3	1 ea	Sony : DVP-NS999ES	Progressive Scan DVD I			

Enhancement – Project/Work Orders: Show Change Order Area Text

New Work Order format Shows Change Order Area text along with the regular Proposal Area Text.

Enhancement – Project/Invoices

-Labor Screen: Validate Labor Time To Invoice field so that you cannot invoice more time than the remaining labor time to be invoiced.

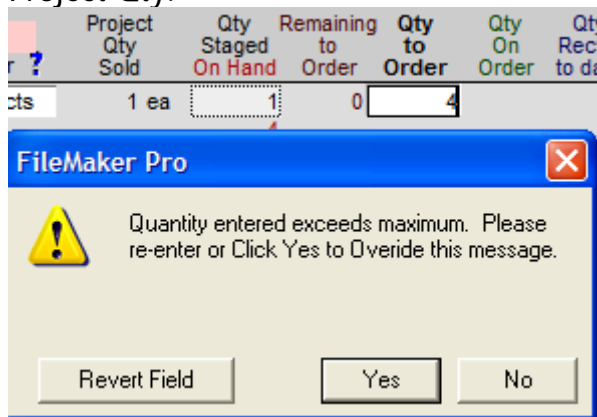
-Add Hourly Labor Rate for each Labor Category

-Add a Labor Amount to Invoice column so that you can see the labor amount that is created from the labor time you enter.

-Fix Labor on Invoices so that it picks up the actual labor amount instead of the labor category rate.

Enhancement – Project/PO's & WO's: Qty to Order Override

If you enter a Qty to Order greater than the Remaining to Order Qty this popup enables you to click Yes and override the system and Order more than the Project Qty.



Enhancement – Project/Payments: Increase number of Payment fields

Add 2 more Payment, Data, and note fields for each of the 5 Payment steps.

Project Pymt Amts	\$3,064.67	
Pymt Date Due	9/12/2006	
Add Payment Invoice	Invoice Pymt Amt	In
Date Invoiced		
1 Payment Amt Made	\$500.00	
Pymt Made Dates	8/16/2007	
Pymt Notes	Check #4573	
2 Payment Amt Made	\$1,000.00	
Pymt Made Dates	9/13/2007	
Pymt Notes	Check #2534	
3 Payment Amt Made	\$800.00	
Pymt Made Dates	10/12/2007	
Pymt Notes	Check #2635	
Balance Due	\$764.67	

Enhancement – Project Manager/All Invoice Screens: Sort order.

When you click on the Invoice Date header column you will be asked to select a sort order on the PO, WO and Sales Invoice screens.

Global Purchase Orders					
View of all Issued PO's					
PO #	QB Invoice #	PO Date	Vendor	PO Total	Project
1079		8/3/2007	Linn Products	\$1,350.00	1291.1-
1080		8/3/2007	Sony Inc	\$240.00	1291.1-
1073		9/12/2006	Linn Products	\$2,844.00	
1074					
1075					84.1-
1076					84.1-
1078					

Message

Sort by Date in Ascending or Descending order

Descending

Ascending

Enhancement – Project/Sales Invoices: Sort Order

Change the Line Item sort order on Sales Invoices and Purchases Orders to Make and Model. Work Orders still sort by Zone, Area, Make & Model.

Enhancement – Project/PO/Utility/Admin Utility: Clear Ordered

This utility will clear all of the Ordered Quantities on all of the Products in this Project

Clear Ordered

Enhancement – Master Tracker/Gantt Chart: Show Continue button

Show Continue button when entering the Gantt Chart from the Master Tracker. Clicking on the Continue button will give you the Options to Print the Gantt Chart or return to the Tracker module. Use the Rolodex in the upper left area to flip between pages.



Enhancement – Proposal Conversion to a Project: Post Payment Amt

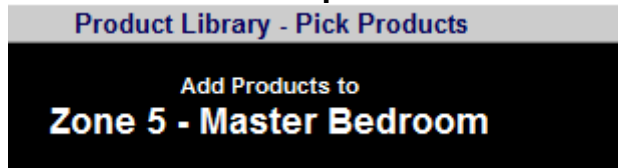
When Converting a Proposal to a Project the Payment Plans are now posted regardless of printing the proposal or not.

Original Project						
Project Pymt Amts	\$300.84	\$902.53	\$601.69	\$902.53	\$300.84	\$3,008.43
Pymt Date Due	9/13/2007	10/3/2007	11/2/2007	12/2/2007	3/21/2008	
Add Payment Invoice	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice
Date Invoiced						Total Pymt Amt

Enhancement – Proposal/Print Menu: Areas & Products Report:

Increase the layout size of the Product Location field under each product to accommodate 8 lines instead of 4. Also move the Location field over a bit to the left so that it displays differently from the Product Features & Benefits section.

Enhancement – Proposal/Pick Product or Set:Add Zone to Header



Enhancement – Proposal/Print Menu/Shop: Subtotal By Phase report.

Show A & B tax for the Total and by Phase

If the Print Option: Show Tax is set to AB Tax, then the Subtotal by Phase report will show the breakout of AB tax by phase.

Enhancement – Proposal/Supplements: Add Phase to the Area Pop Up.

The Area Pop-Up filter that enables you to view Supplements by Area now includes the Zone number as well as the Area.

This works for the Labor, Parts, Wire and Task supplements in Proposals, Projects, Pending CO's and Final CO's as well as the Wire Manager screen.

Areas	Products	Text
Labor	Parts	Wire
		Tasks
All Areas		
Labor assigned to		
Zone - Area	Qty	Make : Model
1 - Home Theater	1	Linn : 5101 Personal
1 - Home Theater	1	Linn : 5101 Personal
1 - Home Theater	1	Linn : 5101 Personal

Enhancement – Proposal/Product Detail/Labor Supplements

Adding a Labor Supplement now automatically determines what remaining Labor Categories are available to add to that product. It also will not add a Supplemental Labor record if no Labor Category or Labor Time is selected.

Primary Install Phase: 3 Final **Proposal - Product Labor Supplements**

Areas	Products	Text		Joel Roberts 1293.1-1.100 Linn : 5110-W Audio : Speaker : On-Wall			
Labor	Parts	Wire	Tasks				
Product	Specs	Pix - PDF's	Labor				

Add Labor Supplement **Phase 1+2+3 Total Labor for 3 ea Linn : 5110-W**

Labor Type	Total DOD: 0%	Labor		Time		Co
		Cost	Sell	Unit w/DOD	Ext w/DOD	
1 - Installation		\$30.00	\$60.00	1:10:00	3:30:00	\$35.00
4 - Parts Labor		\$30.00	\$50.00	0:15:00	0:45:00	\$7.50
5 - Wire Labor - Bulk		\$35.00	\$60.00	0:37:30	1:52:30	\$21.88

Enhancement – Proposal/Areas & Products/Supplements: Add Amount

This new Labor Time Utility enables you to enter a dollar amount for each Install Phase to automatically set the Install Time for each or all phases. The Labor Rate and Totals have also been added to this screen.

Add Pure Labor Supplement - Type & Time

Joel Roberts

Home Entertainment System
1294.1-1.100

Select a Labor Type and enter Labor Time for this Area

Atrium

Labor Type	Labor Rate	Phase 1 Prewire (h:m:s)	Phase 2 Trim (h:m:s)	Phase 3 Final (h:m:s)	Totals
1 - Installation	\$60.00	1:40:00	0:20:00	0:10:00	2:10:00

Only Labor Types that don't exist in this Area can be added

Labor Time Utility

AutoSet Install Time - based on dollar amounts

Select a Labor Type

Enter Dollar Amounts

Click the Set Install Time buttons

\$100.00	\$20.00	\$10.00	\$130.00
Set Phase 1 Install Time	Set Phase 2 Install Time	Set Phase 3 Install Time	Set All Phases Install Time

Enhancement – Proposal/Pure Supplement/Wire: Model Pop-Up

Add Wire Class (Bulk & PreCut) to the pop up value list so that Wire is sorted by Class and easier to select.

Enhancement – Proposal/Wire Supplements: Sort by Class

Checking this box will sort the Wire portal by Wire Class (Bulk & Precut) instead of the normal Area/Make/Model.

All Areas		Wire Supplements					
Wire assigned to		Sort		Bulk		No	
Zone - Area	Qty Make : Model	add/edit Class	<input checked="" type="checkbox"/>	Type	Labor	Total Qty	M
1 - Atrium	2 Klipsch : RS-7	Bulk Wire Room				75 ft	L
1 - Atrium	2 Klipsch : RS-7	Bulk Wire Room				75 ft	L
2 - Basement	5 Klipsch : RS-7	Bulk Wire Room				75 ft	L
2 - Basement	5 Klipsch : RS-7	Bulk Wire Room				75 ft	L
2 - Basement	5 Klipsch : RS-7	Bulk Wire Room				75 ft	L
2 - Basement	5 Klipsch : RS-7	Bulk Wire Room				75 ft	L
2 - Basement	1 Supplemental Wire	Pre-Cut Home				1 pr	L
1 - Atrium	1 Linn : Knekt RCU	Pre-Cut				1 ea	L
2 - Basement	4 Linn : Knekt RCU	Pre-Cut				1 ea	L

Enhancement – Proposal/Supplements/Wire/Wire Manager:

1. Add "Supplemental Wire" label to the Product display.
2. Add Estimated Labor Time to on Bulk and Precut wires.

All Areas		Wire & Cable Supplements			
Wire assigned to Source & End:		Bulk Run		Total	
Source	Zone - Area : Make : Model	Class	Type	Qty	M
Src >	1 - Atrium : Linn : 5101 Personal Handset	Pre-Cut		1 pr	L
End >			Est Wire Labor 0:05:00		F
Src >	1 - Atrium : Linn : 5101 Personal Handset	Bulk	Home	150 m	L
End >			Est Wire Labor 1:15:00		L
Src >	1 - Atrium : Linn : 5101 Personal Handset	Bulk	Home	150 ft	L
End >			Est Wire Labor 1:15:00		E
Src >	1 - Atrium : Supplemental Wire	Pre-Cut	Home	1 pr	L
End >			Est Wire Labor 0:05:00		F
Src >	1 - Atrium : Supplemental Wire	Bulk	Home	200 ft	L
End >			Est Wire Labor 1:40:00		S

Enhancement – Archive Screen: Speed up the screen refresh

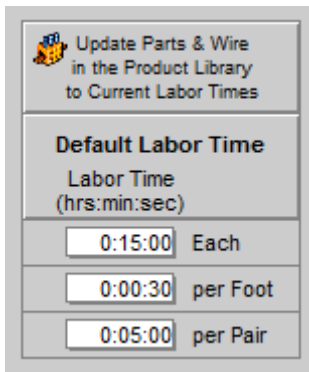
Change the Proposal Total field to the posted field so it will not need to calculate when the screen is drawn.

Enhancement – All 35 SCPS database files: Fast Open screens

Each of these screens now has a Horizon Logo and an Exit SCPS button. Should you accidentally reach one of these screens you can now click on the Horizon Logo and return to the main SCPS logo screen and with an automatic Entity Unlock function or Exit SCPS entirely.

Enhancement – Preferences/Labor/Labor Rates: Update Parts & Wire

If you change the Master Preferences Labor Time on Parts and Wire you can now update your entire Product Library to these times with this button.



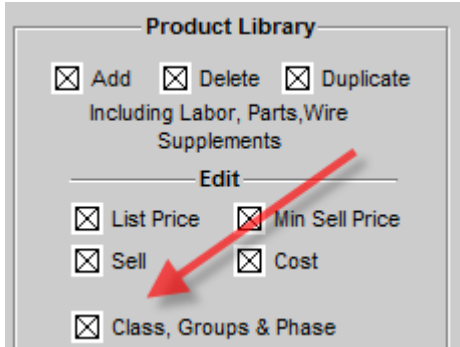
Update Parts & Wire
in the Product Library
to Current Labor Times

Default Labor Time
Labor Time
(hrs:min:sec)

0:15:00	Each
0:00:30	per Foot
0:05:00	per Pair

Enhancement – Preferences/Users/Access Rights: Class & Groups

You can now restrict access to the Product Library Groups, Class & Phase fields.

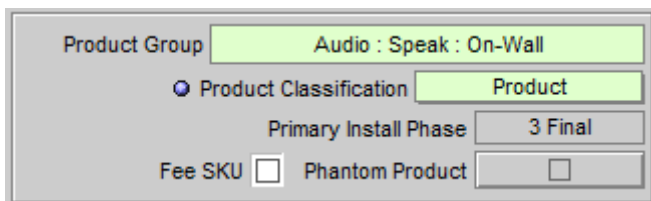


Product Library

☒ Add ☒ Delete ☒ Duplicate
Including Labor, Parts, Wire
Supplements

Edit

☒ List Price ☒ Min Sell Price
☒ Sell ☒ Cost
☒ Class, Groups & Phase



Product Group **Audio : Speak : On-Wall**

☒ Product Classification **Product**

Primary Install Phase **3 Final**

Fee SKU ☐ Phantom Product ☐

Enhancement –Preferences/Other/Product2: Do not update Inventory

Checking the Do Not Update Inventory box will prevent the Inventory Control module in the Product Library, not to update the Quantity on Hand when receiving PO items.

Enhancement –Preferences/Other/Project: Do not Show CO number Option.

Check "Do Not Show Change Order Numbers" on the Project Area & Project report.

1296.1c1-1.100
1296.1c2-1.100

Home Entertainment System
for Ron Efron



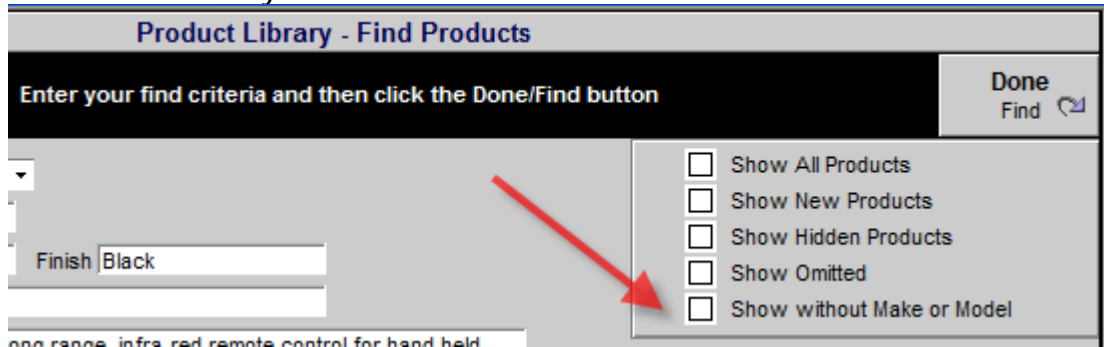
Areas & Products

Enhancement – Product Library/Find Products: Find Multiple Makes

You can now select Multiple Makes in the Find Products/Find with more Criteria screen.

Enhancement – Product Library/Find Products/Find with More Criteria

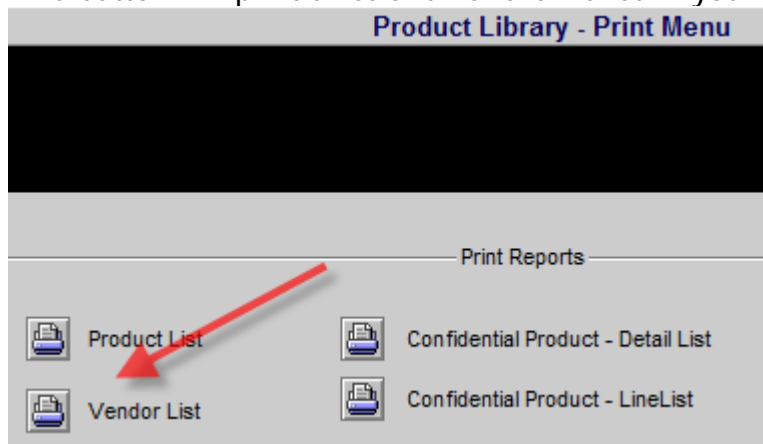
Checking this box will find all Products in your Product Library that do not have either a Make or Model number in them. It is important to always have a Make and Model in every Product.



Enhancement – Product Library/Utility/Utility 2: Export SCPS Products
Improve this export routine so that it only exports SCPS product Data fields, so that this process is much faster.

Enhancement – Product Library & Contact Library/Print Menu: Print Vendor List

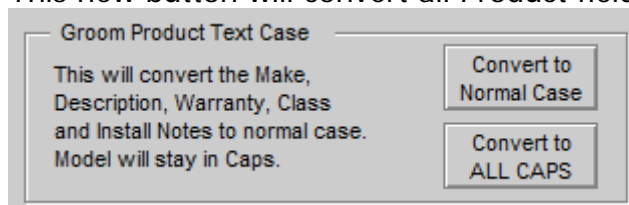
This button will print a list of all of the Makes in your Product Library.



Enhancement – Product Library/Inventory Screen: Add Finish field
Added the Product finish field to this screen.

Enhancement – Product Library/Utility 1: Convert to ALL CAPS

This new button will convert all Product fields to CAPS.



Enhancement – POS Invoices: Multiple Delete & Archive

Quotations, Sales Invoices,
Work Orders, Service Orders,
Purchase Orders, Change Orders,
Return Authorization

You can now Delete multiple Invoices.
You can now Archive multiple Invoices
You can also Restore any Invoice from it's Archive.

POS - Quotation List				
Click on Quotation to view				
Company	Date	Proposal	Amount Sold	Archive
Gen-x Sports Inc.	9/22/2005		\$4,952.11	<input type="checkbox"/>
	9/16/2005		\$73.25	<input type="checkbox"/>
	8/4/2005		\$1,063.25	<input type="checkbox"/>
	7/14/2005		\$319.92	<input type="checkbox"/>

POS - Quotation List - Archive List				
Click on Quotation to view				
Company	Date	Proposal	Amount Acpt	Restore
	9/29/2005		\$14,823.63	<input checked="" type="checkbox"/>
	9/21/2005	137410	\$4,180.27	<input checked="" type="checkbox"/>

Enhancement – POS: Printed Quotations, Invoices, WO's

Improve Printing forms by removing the footer section of the report and placing it in the Title section so that it appears on all pages except the first one.

Enhancement – Contacts/Utility/Export Contacts: Merge Email Address

This utility enables you to find all your desired contacts and the create a field of data with ALL of the Favorite Email Address's, that you can copy and paste into the send address bar of your email client application (ie: Outlook) or to Export all of these addresses to an Excel spreadsheet.

First Find all of the Contacts you want to use....Then click on the Create Merged Emails button.
Using the buttons below...Copy and paste the email addresses into your eMail client address bar,
or Export the email addresses to a file that can be opened by Excel

30 of 30 Contacts

Create Merged Emails

Copy all Email Address
to Paste into Email Address bar

Export All Email Address
for Excel

Enhancement – GraphicsDraw! Impact

The CPS GraphicsDraw! Module has been added to SCPS. You can automatically create Block Diagrams of your Proposal and Floor Plan layouts with 130 CEDIA Symbol icons and drawings of all kinds. A GraphicsDraw! Training Video is also available when you enter the GraphicsDraw! screen. Please request the GraphicsDraw software from Horizon via email if you wish to use this feature.

Master Prefs - Other - Graphics Draw!

Products 1Products 2CountersMisc3rd PartyGraphics

Enable Graphics Draw!

Enable Impact GraphicsDraw! ☒

You must have the Impact program installed and the Graphics files.
Please contact Horizon Software

GraphicsDraw!


*You can open these Drawing Programs if they are installed on your computer
and they are enabled in your SCPS Preferences*

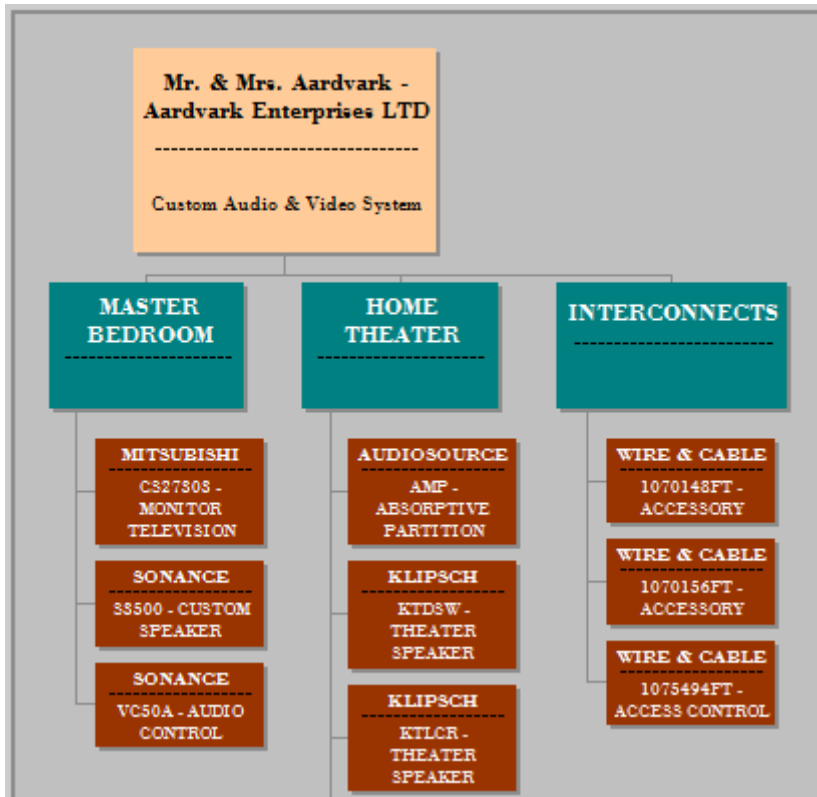
Impact GraphicsDraw!

Flow Charts
Schematic Diagrams
Floor Plans

Spreadsheet Tables
Organizational Charts
Word Processing & Outlines
Multi-Media Video Presentations

Impact
GraphicsDraw!

 **Impact GraphicsDraw!** Data Export - Help guides are on the GraphicsDraw screen.



Enhancement – QuickBooks Link

SKU Number: If a Product in the SCPS Product Library has a SKU number then SCPS will use this SKU number instead of the Make-Model as the Item number when pumping up an SCPS Sales Invoice into QuickBooks. This enables you to enter your QuickBooks Item numbers into SCPS so that new items will not be created in QB if they don't exist in QB.

Product	Specs	Pix
Make	Linn	
Unique Model	5101 Personal Handset	
QB SKU	Linn:5101	
Finish	Black	

Project Invoice Display:

No Product SKU number = Make – Model

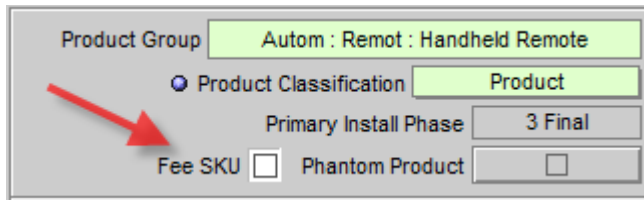
Product SKU number = SKU number

SKU History: Adding a QB SKU into SCPS will automatically enable that SKU number to be used for the QB pump up for ALL existing Proposals & Projects.

Fee Items on Invoice:

If you create a Fees Product in the Product Library and check the Fee SKU box, that Fee Product will show up in the Fees SKU pop-up list in both the Master Fees and Proposal Fees screens.

You can then assign one of these Fees SKU's to a Fee so that it will be used on the Project Invoice when pumping up that Invoice into QuickBooks.

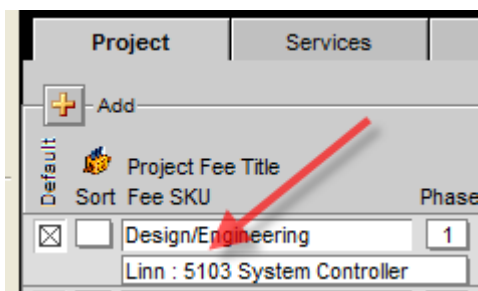


Product Group: Autom : Remot : Handheld Remote

Product Classification: Product

Primary Install Phase: 3 Final

Fee SKU: ☒ Phantom Product: ☐



Project Fee Title

Sort Fee SKU: Design/Engineering

Phase: 1

Linn : 5103 System Controller

Fees:

No Fee SKU = Fee - Item

Fee SKU, no Product SKU number = Make – Model

Fee SKU, Product SKU number = Product SKU number

Item	Description
e1	Design/Engineering
Fee - Item	Documentation
Linn - 5103 System Controller	Project Management

Enhancement – RCMS Project Pump Up

Extensive work has been done on the RCMS Project pump up and this feature can now be implemented by RCMS users. Please contact Horizon Software and RCMS for assistance with setting up this feature.

Enhancement – RCMS & Quickbooks Fees Pump Up

Fee Items on Invoice:

RCMS users who put an “fe” into their RCMS Status Code field will designate that item as a fee and that Fee Product will show up in the Fees SKU pop-up list in both the Master Fees and Proposal Fees screens.

You can then assign one of these Fees SKU's to a Fee so that it will be used on the Project Invoice when pumping up that Invoice RCMS.

Product Group: Autom : Remot : Handheld Remote

☒ Product Classification: Product

Primary Install Phase: 3 Final

Fee SKU ☐ Phantom Product ☐

Project	Services	Add	Project Fee Title	Sort	Fee SKU	Phase
<input checked="" type="checkbox"/>			Design/Engineering			1
			Linn : 5103 System Controller			

Enhancement – RCMS Chelsea: Import Product Descriptions

Chelsea Product Import Map now will add product descriptions for New Products that do not exist in the Product library and retain product descriptions for products that exist in the Product library and already have a product description. If they do not have a product description, their description will be updated.

Enhancement – RCMS/Product Library Import: Absolute Sound

New Import map

Absolute Sound

Update prices on products with the same Make and Model.
Add products that do not exist in the Product Library.
Update Product Groups, Not Descriptions.
Product Text will be groomed automatically. Make, Descript=Caps
Product Units will be changed from Each=ea, Foot=ft, Pair=pr.

Price A iv107 = pd.unit.list
Price B iv108 = pd.unit.sell
Price D iv110 = pd.unit.sell.min
Comm Cost iv024 = pd.unit.cost

Import

Enhancement – Product Library/Utility/Dealer Data Import: Ultimate Sound & Installation, Inc. - Excel Import

Custom Programming import routine for Ultimate to import their Excel price sheets.

Import Products from Ultimate - Excel

Ultimate

Important: Populate the 2 Make words field before Importing so the routine will know which products have 2 Make Words instead of 1.

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

Enter Make names with 2 words like Boston Acoustics.
Enter each Make on a separate line.
Example:
Boston Acoustics
Monster Cable

2 word Make names

- Audio Ease
- Avaya Partner
- Pro Video
- Gem Electronics
- Anthony Gallo
- Audio Authority
- Bay Audio
- Studio Tech

Import

Enhancement – Upgrade Routine: Unlock all Entities.

Add the Unlock all entities routine to the upgrade process.

Fix – Proposal/Project: Entity Lock

1. Entering SCPS from the User Login screen now automatically turns off the User Abort, Status Bar and Toolbar menus so that users cannot accidentally click on the Cancel command when previewing a report.
2. If a user accidentally reaches the Horizon Logo screen in any database and clicks on the Horizon logo they will now be taken to the Login screen and all Entities will be Unlocked.
3. When leaving Change Orders they now properly Unlock Entities.
4. If at any time users are left in a zero found set Entities will be automatically unlocked.

Fix – Proposal & POS/Pick Products: Favorite popup

The new User & Group Favorite system now works when picking POS and Proposal products.

Fix – Proposals/Pure Supplement Screen: Done Button (5.6v2)

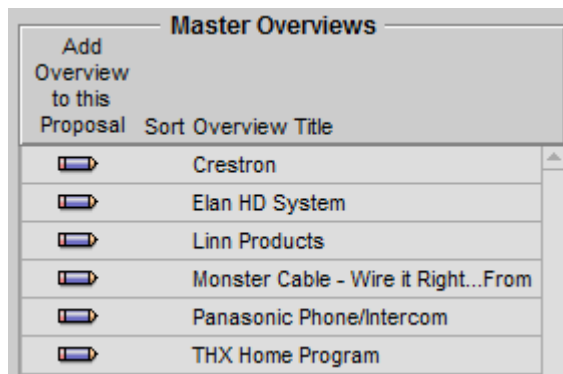
The done button now works properly on this screen.

Fix – Proposal/Print Menu: Print All

The proposal Print All button now is separate from the Fast Track Print button which can be customized to print proposal sections in any order a user want. Print All now Prints All sections as it should.

Fix – Proposal/Overview: Sort Order

Add Sort Placement and Title to Overview Portals so that they sort properly and match the Master Preferences sort order.



Fix – Project/Sales Invoice: Correct Labor amount

The correct Labor amount now shows on the Sales Invoices when automatically selecting labor to invoice.

Fix – Project/Print Change Order: Printing a CO

After printing or previewing you stay in the Print Menu screen instead of the Proposal Detail screen.

Fix – Archive: Fav A, B, C buttons

The Fav A, B, C buttons now keep you in the Archive module instead of switching to the Completed module.

Fix – Contact/Print Menu/Mailing Labels: Center labels on Avery 5160

The Address label has been centered so that the label and the Tag Line do not overlap the Avery 5160 Label space.

Fix – Follow-Up Module: Print single Letter

Print a Follow-Up letter now only prints 1 copy as it should.

Fix – RCMS Users: Add new contact to RCMS in CAPS

When adding a new contact into the RCMS bookkeeping system the name and address will automatically be in CAPS.

Fix – Pick Product Sets: Fix Show and Clear Picked

Both Show Picked Sets and Clear Picked Sets work properly now.

Find Product Sets	Fav A	B	C	Product Set Library - Pick Sets	
Add Product Set to Library	Show Picked Sets	Add Product Sets to Zone 5 - Master Bathroom Orphaned subset			
	Clear Picked				
Pick Qty	<u>Set Name</u>	Quick View <u>Set Description</u>			

SCPS Version 5.6
Released: 7/16/2007

Enhancement – Global & User Favorites – All Modules

Extensive work has been done to the Favorites feature in each SCPS module which should increase User productivity. Assigning Favorites to records that you frequently use or need to access quickly is a great way to speed up your workflow.

Each User who log's into SCPS can now have their **own Favorites** or they can use the Global Favorites which are the same for all users.

Important: Each User can be assigned rights to their own Favorites or the Global Favorites in the Preferences/Users/Access Rights screen.

Check All	Uncheck All	User Access Rights
User or Global Favorites Check = "User" Fav's <input type="checkbox"/> Empty = "Global" Fav's		Dave Dowling Sales Specialist

All modules now Sort favorites by clicking on the underlined **Fav** column header and you can Find Favorites quickly using the **Fav A, B or C** buttons.

These Modules all have the new Favorites feature:

- Proposals
- Projects
- Completed Projects
- Archived Projects
- Product Library
- Product Sets Library
- Text Library
- Letters Library
- Info Library
- Contacts

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 - Line List																	Utility ? Home					
Show Products	Add New Product																			Other Views	Inventory Control	Leave				
Show Parts																				Phan	Lab	Auto Tag	Product Sets			
Bulk	PreCut	345 of 451 Items																	Part	Wire	Show Hidden	Print Menu				
All Groups																										
Displin	Cat	Type	Class	Make	Model : SKU	Description	Finish	Sell Price (Installed)																Fav	Hide	
Autom	Remot	Handheld Remote		Linn	5101 Personal Handset	Universal learning remote Black		390.00 ea																	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Ampli	Surround Process		Linn	5103 System Controller	Linn 5103 inc DTS, no RF		5,500.00 ea																	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Speak	On-Wall		Linn	5110-W	Pair of on-wall	White	325.00 ea																	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Ampli	Multi-channel		Linn	5125	Five channel power	Silver	2,750.00 ea																	<input type="checkbox"/>	<input type="checkbox"/>

Enhancement – Proposal Options

-Master & Proposal Prefs "Print Options" now enables you to select the kind of prices you want to show in the product description of Option Products. You can

change these settings in Master Prefs/Proposals/Print Options or Proposal/Print Menu/Print Options for specific proposals.

1. Do not show option prices
2. Show as selected Print Option prices (from the Show Line Item Prices)
3. Always show as the Installed Price & Supplements

Areas & Products Report - Pricing

Show Line Item Prices

☐ Product : Ext Sell

☐ Product/Parts/Wire : Ext Sell

☐ Product + Product Labor : Ext Sell

☒ Product/Parts/Wire + Product/Parts/Wire Labor : Ext Sell

☐ Product : Ext List

☐ Hide Sell Price

Area Totals ☒ Show Area Totals ☐ Hide Area Totals

Show "Option Prices" in Product Description

☐ Do Not Show Option prices

☒ Show as selected Print Option prices

☐ Show as Installed Products & Supplements

-The Proposal Product Listing now includes the type of price such as "Ext Installed Price"...or "Ext Product/Parts/Wire". Depending on the Show Line Item Prices Selected.

Proposal Listing	Linn : Knekt RCU *Option: Ext Installed Price \$2,495.00 : Knekt room control unit : White
------------------	--

-Clicking on the Product Description of an Option Product will display the way the description will look on the Proposal.

Proposal - Detail by Area Q View Utility ? Home

Mike Hammerstad Whole House Music System 1269.1-1.100	Pricing	Purchasing	Leave
	Payments	Work Orders	Tracker
	Change Orders	Invoicing	Print Menu
Profit per Hour		Total Labor	Grand Total

Make : Model Description Area Totals

22,828.99

Linn : 5125 Five channel power amplifier (Black) **Option**

Linn : Katan

Linn : Melodik

Runco : CL-610

Sony : DVP-NS99

Linn : 5101 Perso

Linn : Knekt RCU

Klinch : PC 35

Options Description (please expand window to show prices) X

Linn : 5125
*Option: Ext Price \$2,612.50

OK

-Proposal Product Detail screen now shows all of the Product Prices regardless of the Options setting.

		Product Unit Price w/Disc Adjust	Parts Unit Total	Wire Unit Total	Option Unit Installed Price Product Parts & Wire	
Option						
Sell		\$750.00	\$255.00	\$125.00	\$1,130.00	
Labor		\$100.00	\$12.50	\$5.00	\$117.50	GP%
Installed		\$850.00	\$267.50	\$130.00	\$1,247.50	41.2%
Labor Time		1:30:00	0:15:00	0:05:00	1:50:00	
Extended Qty						
2						
		Product Ext Price w/Disc Adjust	Parts Ext Total	Wire Ext Total	Extended Installed Product Parts & Wire	
Ext Sell		\$1,500.00	\$510.00	\$250.00	\$2,260.00	
Ext Labor		\$200.00	\$25.00	\$10.00	\$235.00	GP%
Ext Installed		\$1,700.00	\$535.00	\$260.00	\$2,495.00	41.2%
Ext Labor Time		3:00:00	0:30:00	0:10:00		

Enhancement – Project/Work Orders: Add Client Signature line

Added a Client Signature line to the Project Work Order

Enhancement – Upgrade: Add file name to upgrading error notice.

When upgrading SCPS an error message screen will now show the File Name of any file that is damaged or has no records. If you get this screen during the Upgrading process, please make note of the **File Name** and call Horizon Software for assistance.

Enhancement – Product Library/Product Detail: Qty to Order

The Quantity to Order and cost value now shows in the Product Library/Detail screen. This Qty is based on the Optimum Qty – the Inventory On-Hand Qty.

The screenshot shows a window titled "Alt PO Vendor" with a search icon. Below the title bar, there are several input fields and a table. The input fields are: "Purchasing Lead Days" with value 7, "Optimum On-Hand Qty" with value 6, "ReOrder Point" with value 2, and "Inventory Qty On-Hand" with value 1. The "Qty to Order" is calculated as 5. To the right of these fields is a table with two columns: "Cost Value" and "Qty to Order". The table shows the following values: "Cost Value" is \$2,700.00, "Qty to Order" is 5, and the total cost is \$2,250.00.

Field	Value	Cost Value
Purchasing Lead Days	7	
Optimum On-Hand Qty	6	\$2,700.00
ReOrder Point	2	\$900.00
Inventory Qty On-Hand	1	\$450.00
Qty to Order	5	\$2,250.00

Enhancement – Project/Print Menu: Staple Up Cards, Wire & Cable

You can now add Bulk and Precut wire to the Staple Up Cards and can Select which ones you want to show on the cards.

The screenshot shows a dialog box titled "Staple Up Cards" with a printer icon. Inside the dialog, there is a section titled "Select Wire & Cable to show on Staple Up Cards" with two checkboxes: "Bulk" (checked) and "PreCut" (unchecked). Below the checkboxes, there is a note: "A max of 4 Wires and Cables will show on the Card". At the bottom, there is a warning: "The 'Issue Staple Up Cards' must be checked on a Product for a Staple Up Card to be created for that Product".

Enhancement – Follow-Up; Letter Closing

Add a Letter Closing Field in Master Prefs/Follow-up so that users can enter closings like "Sincerely," etc and these will show up on the Follow-up letters in the Follow-Up module. Also increase the space between the closing and the salesman's name to make signing easier.

Enhancement – Follow-up letters

Improve GUI and Address Label so that Follow Up letters use the Fav Label selection for the Contact from the Contact Detail screen.

Enhancement – Follow-Up; Printer Setup button

Add a Printer Setup button in the Follow-Up module so users can change printers and/or print to a Pdf so that follow-up letters can be emailed to their clients.

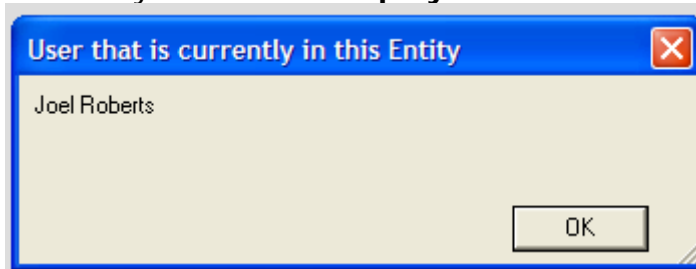
Enhancement – Proposal & Project/Pricing/Fees Tax: Add Cost field

The Cost of each Fee is now displayed on these screens.

Enhancement – Entity Lock: Admin Lock Out & Entity User Notice

Only one user is able to enter an Entity (Proposal, Project) at a time. The Master Entity Unlock (System Utility) now clears all Locked Entity Users. All Home buttons have been enhanced to unlock current Entity.

The Entity Lock Notice **displays the User Name** currently in that locked Entity.



Enhancement – Product Library: Increase Sell Price Fields

All Line List views now will display sell prices in excess of \$100,000.00

Enhancement – All Library Print Menus: Add Printer Setup button

Added a Printer Setup button on the Print Menu screens of all Libraries.

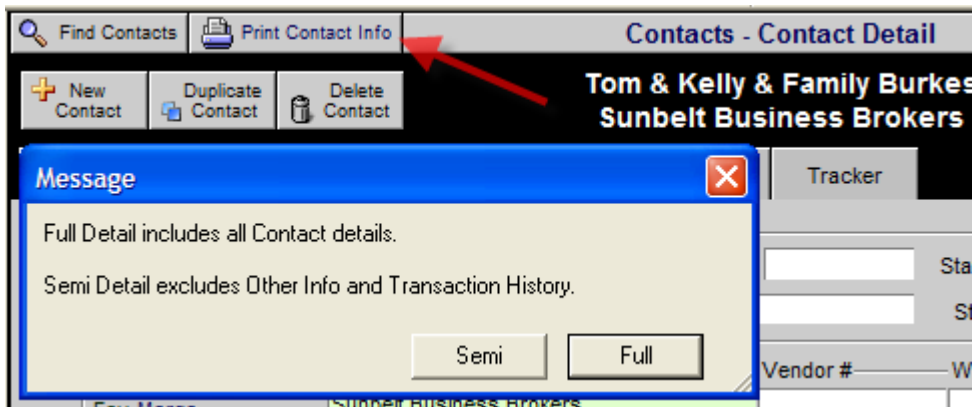
Enhancement – Proposal/Detail by Area: Click on Product

Clicking on the Product Make:Model number will take you to the Product Detail screen for that Product.

Proposal - Detail by Area			▼	▲	▬	Q View	Utility	?	Home
Mike Hammerstad Whole House Music System 1269.1-1.100			Pricing		Purchasing		Leave		
			Payments		Work Orders		Tracker		
			Change Orders		Invoicing		Print Menu		
			Profit per Hour		Total Labor		Grand Total		
Qty	Make : Model	Description	Area Totals						
			22,828.99						
1 ea	Linn : 5125	Five channel power amplifier (Black)	Option						
5 pr	Linn : Katan	Bookshelf loudpeakers: pair	4,726.25						
1 ea	Linn : Melodik	Aktive isobarik bass extension	4,702.50						
1 ea	Runco : CL-610	DLP Projector	7,595.25						

Enhancement – Contacts/ContactsDetail: Print Detail

The Print Detail button now prints a Full Detail or Semi Detail report of the current contact.



Enhancement – POS/Sales Invoice: Comments Field

Increase the size of the POS Sales Invoice Comments Field to accommodate more text.

Fix – Project/Invoices: Do not show Tax if the “Show Tax” is No

Sales invoices for both Payment and Itemized invoices are now not shown on Invoices if the Proposal/Project Preference “Show Tax” is set to “No”.

Fix – Proposal/Print Menu/Product Summary: Product Features Option

The Option to print or not to print Product Features on the Product Summary report now works correctly.

Fix – Proposal/Print Menu/Shop Menu/Print Site Directions

This report would sometimes print the wrong report. This has been fixed.

Fix – Proposal/Area Text: View Area Text

When you are in a Master Project or Finalized Change Order the Area Text button will bring you to an Area Text screen where you can only View (not modify) the text in each Area. When you are in a Proposal or a Pending Change Order you have the ability to add or modify area text as usual.

Fix – Product Library/Wire Supplements: Wire Labor Total-No Labor

The Wire Labor Total is now accurate when the No Labor checkbox is selected on any Group Wire Supplements or Additional Wire is checked.

Model				Additional Wire & Cable			Total Group Price		
<div><div></div><div><div></div><div></div></div></div>				<div><div></div><div></div></div>			Only products classified as "wire" can be added		
No Labor	Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Price	
<input type="checkbox"/>	1	pr	Linn	Black Interconnect	Pair of	3	120.00	120.00	
<input checked="" type="checkbox"/>	1	ea	Linn	CAT5-40m	Terminated CAT5	1	125.00	125.00	
<input type="checkbox"/>	1	ea	Linn	CAT5-40m	Terminated CAT5	1	125.00	125.00	
							Total Additional Price	\$370.00	
							Wire Labor \$90.00	Grand Total Assigned Price \$615.00	

Fix – Project/Change Order: Show Original Area Text option

The Original Area Text now shows along with the CO Area Text when this option is selected.

Pending Change Order - Print Menu Options		Print CO	? Home
Mike Hammerstad		Change Order	Done
Home Entertainment System		Overviews	
1269.1c1-1.100		Fees & Services	
<div> <div> Area Products by Discipline ct Install Location Text - No Products </div> <div> <div>Change Order</div> <div>CO Title</div> <div>Entering a title will override the default title for this CO and will not affect the Master Project title.</div> <div></div> <div> <input checked="" type="checkbox"/> Show Original Area Text in addition to the CO Area Text </div> <div> 7/6/2007 Report Date - Lock </div> </div> </div>			

Fix – Opening SCPS: No Secure FM Plug In Exit

If you do not have the Secure FM plug in installed in your FileMaker folder, SCPS will not open and you will get a warning message of this fact. SCPS now exits FileMaker directly and does not bring you to the main logo screen.

Fix – POS/Quotes & Sales Invoices: Printing Subtotals

The second header has been removed from these invoices so that 2 or more page invoice subtotals do not slide into the header when printed.

Fix – RCMS Users: Proposals & Project not found using Alpha Finder

This has been fixed so that in the future changing a contact name will update the Proposal & Project so that it will be found by the AlphaFinder.

Important Note: To fix existing Proposals & Project, please click on the "Find Proposals" button in the Proposal list and click on the "Find without AlphaFinder Keys" button. This will find all of the Proposals & Projects that have this problem. Then click on the Proposal or Project and go into the Client screen and

then click Done to leave that screen. This will update the Proposal or Project and you will then be able to find it using the alpha finder in the future.

Find Proposal - Utility	
Find without AlphaFinder Keys	Enter find criteria and click the Done/Find button

SCPS Version 5.5 Released: 6/1/2007

Special Enhancement – CPS – SCPS Integration Upgrade 7.9v1

SmartPartners who are running CPS along with their SCPS software need to also upgrade to the new CPS 7.9v1 files. Please call Horizon if you are running CPS along with SCPS and we will supply you with these files and assist you with the upgrade. You cannot install this SCPS 5.5 upgrade without also upgrading your CPS files.

Enhancement – Project/Invoices; QuickBooks Estimate

You can now automatically create a QuickBooks Estimate of a SCPS Project from the SCPS Invoice screen. All Project products, labor, parts, wire and fees will be added to the QB Estimate. Once an Estimate has been created in QB, partial payments and itemized invoices can be created from the Estimate in QB.

All Phases	Phase 1	2	3	QB Estimate	Sales Invoice - All Products			
Joel Roberts 1292.1-1.100					Amount Remaining To Invoice		Labor Left	Qty to Invoice
					Project Total \$2,843.13		3:50:00 (hrs:mn)	Products:
					Total Invoiced		Fees Left	Part:
SI Products	SI Parts	SI Wire	SI Labor	SI Fees	Amt to Invoice \$2,843.13		2	Wire

Enhancement – Product Library/All List Views; Installed price pop-up

If you click on the Sell Price on any product a POP UP Window will display the Installed Price of the Product and the Supplement totals as well.

Make	Model : SKU	Description	Finish	Sell Price (Installed) ▲	Fav Hi
Crestron	AADS	Adagio Audio Distribution	Black	2,500.00 ea	<input type="checkbox"/>
Crestron	AADS-XM	Adagio Audio Distribution	Black	2,900.00 ea	<input type="checkbox"/>
Crestron	AAE	Adagio Audio Expander	Black	1,800.00 ea	<input type="checkbox"/>
Crestron	C2N-DB12_	Decorator Keypad 12	Specify	260.00 ea	<input type="checkbox"/>
Crestron	C2N-DB6_	Decorator Keypad 6	Specify	260.00 ea	<input type="checkbox"/>
Crestron	C2N-DB8_	Decorator Keypad 8	Specify	260.00 ea	<input type="checkbox"/>
Crestron	CNAMPX-12X60				
Crestron	CNAMPX-16X60				
Crestron	CNAMPX-2X60				
Crestron	CNAMPX-7X200				
Crestron	CNX-B12_				
Crestron	CNX-B2_				
Crestron	CNX-B4_				
Crestron	CNX-B6_				
Crestron	CNX-B8_				
Crestron	CNXBRMO				
Crestron	QM-AMP3X80MM				
Crestron	TPSBLOCK-10				

Installed Price (expand window)

Crestron
C2N-DB8_
Decorator Keypad 8 Button Specify

Product Price: \$260.00 ea
Total Parts Price: \$105.00
Total Wire Price: \$120.00
Total Labor: \$200.00

Total Installed Price: \$685.00 ea

OK

Enhancement – Master Tracker/Print Menu; Task & Milestone Report.

Increased the size of the Task Notes.

Added Month and Day to the Date of each Task.

Enhancement – Master Prefs & Proposal Contract.

Increased the size of the Extra Text Message field to accommodate more text.

Enhancement – Proposal/Print Menu/Shop/Staging Reports:

Added Stock and Delivered entry lines to these reports.

EME Audio & Video Systems - Confidential Report										
5/16/2007		Staging Document						Page 1		
Mike Hammerstad										
Whole House Music System										
1269.1-1.100										
Phase-Class	Qty	Make-Model-SKU-Finish-Description				Ck	InStock	OnOrder	Date	Initial
2 Trim	1 pr	Linn : Diskreet-Rd : White				Order	<input type="checkbox"/>			
Product		In-wall loudspeakers - Round				Re'vd	<input type="checkbox"/>			
Linn						Stock	<input type="checkbox"/>			
						Delivered	<input type="checkbox"/>			
#										

Enhancement – Project/Work Orders:

Increased the size of the Work Order notes field to accommodate more text.

Enhancement – Product Library/Product Detail: Prices

Refine Product and Supplement Prices and Installed Prices for better clarity.

Unit ea	Net Price	Loading Calculator	Loaded Price	Supplements	Installed Price
List	Adjustment Type %			Labor	GP 43.1%
Sell \$800.00			Sell \$800.00	Parts \$255.00	Sell \$1,180.00
Minimum Sell	Min GP % \$		GP 43.8%	Wire \$125.00	Labor \$117.50
Raw Net Cost \$450.00	Net Cost + % + \$		Cost \$450.00	\$100.00	
				\$900.00	Total \$1,297.50
				\$267.50	
				\$130.00	


Enhancement – Product Library/Product Detail: Option Prices

Display normal Prices for “Option” Products even though these prices are not added to the Proposal.

Option	Product Unit Price w/Disc Adjust	Parts Unit Total	Wire Unit Total	Option Unit Installed Price Product Parts & Wire	
Sell	\$800.00	\$255.00	\$125.00	\$1,180.00	
Labor	\$100.00	\$12.50	\$10.00	\$122.50	GP%
Installed	\$900.00	\$267.50	\$135.00	\$1,302.50	?
Labor Time	1:30:00	0:15:00	0:10:00	1:55:00	
Extended Qty 2	Product Ext Price w/Disc Adjust	Parts Ext Total	Wire Ext Total	Extended Installed Product Parts & Wire	
Ext Sell	\$1,600.00	\$510.00	\$250.00	\$2,360.00	
Ext Labor		\$25.00	\$20.00	\$45.00	GP%
Ext Installed	\$1,600.00	\$535.00	\$270.00	\$2,405.00	?
Ext Labor Time					

Enhancement – Project/Finalized Change Order: Printer Setup

Add a Printer Setup button to the Finalized CO Print Options screen.

 Printer Setup	Finalized Change Order - Print Menu Options
hp LaserJet 1320 PCL 6,winspool,Ne03:	Joel Roberts

Enhancement – RCMS Pump Up; Complete posting of a Project into RCMS when converting the Proposal into a Project. RCMS users please contact Horizon if you wish to enable this feature.

Fix – Project/Change Orders: Posting CO Totals to the Master Project

Clearing Option Products caused the Posting of Finalized CO totals to not be added to the Master Project. This has been corrected.

Special Note: If you have a Finalized CO that has not been posted to the Master Project..go into that Finalized CO/Pricing screen and click on the “Repost CO Totals” button in the upper left corner of the screen.

Fix – Product Library/Utility: Assign Groups to Many Products (Class)

Add Class to the Group assignment mechanism.

Fix – Master Tracker Calendar;

Printed View of Monthly Calendar now shows does not show Product Tasks.

Fix – POS/Sales Invoice/Invoice Costing:

Remove "Done" and "Convert" Invoice button from these invoices.

Fix – Fees;

Master Prefs/Fees; Add Cost % to Master Prefs/Fees/Expenses.

Proposal/Fees; Remove Cost % Auto Entered amount.

Proposal/Fees; Fees now pick up Master Prefs, Cost % values.

Proposal/Project/Fees; Display Fees Cost % values.

Fix – Project/Invoices: Total Project Amount

The Total Project Amount now is correctly displayed.

Fix – Product Library/Product Detail: Override Install Phase

You can Override the Group Assigned Primary Install Phase for a specific Product. This function now works properly.

SCPS Version 5.4v4

Released: 5/4/2007

Fix – Proposal/Product Summary Report without Disciplines; This report now shows all Products including Options and with the like kind Products and their Options in the proper order. This report works properly when showing or not showing Disciplines.

Fix – RCMS Users; Proposal/Contact Detail; Trim Address and City fields to remove any blank spaces at the end of the Address and City.

Fix – RCMS Users; Proposal/Contact Detail; Check & Set Contact Key Value so that Duplicated Proposals will update the Contact Name when switched.

SCPS Version 5.4v3
Released: 5/3/2007

Enhancement – Proposal/Product Detail; Display Supplement Prices on this screen even when the Options checkbox is checked.

Enhancement – Proposal/Labor Supplement; Increase Hourly Labor Rate display to 2 digits. \$60.00

Fix – Proposal/Add Pure Labor Supplement; Correct Proposal and Client Name shows on this screen, when adding a Pure Labor Supplement to an Area.

SCPS Version 5.4v2
Released: 5/2/2007

Enhancement – Proposal/Print Menu/Area & Products Report; Reduce the clipping of Area Text by breaking layout parts across page breaks and adjusting the overlap of sliding fields.

Enhancement – Proposal/Print Menu/Product Summary; Indent Features paragraph under each product for a better look.

Enhancement – SCPS Subscription renewal; Activate Later button now goes to the Main SCPS Logo screen instead of the Log in screen.

Fix – Proposal/Contract Report; Client name moved back under the client signature line.

Fix – RCMS Proposals; Client name now shows on screen when adding an RCMS client and/or creating a Proposal from a Favorite Contact. Go into the Client screen and then click on Done to reset the Client name on that Proposal.

Fix – Product Library/Product Detail; Hide Product checkbox
This checkbox now functions properly just like the Hide Product button on the Product Line list screen.

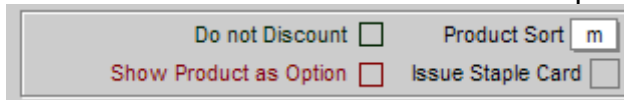
SCPS Version 5.4
Released: 4/27/2007

Enhancement – Proposal Custom Reports Module

- Several enhancements in this upgrade have also been made to the Reports.fp5 module. If you are using the Custom Proposal Report module, you will need to upgrade it to this version (5.4). Please contact Horizon if you need assistance with moving your customized proposal layouts forward to the new 5.4 Reports file.

Enhancement – Proposal “Options” mechanism

- You can now select any product in a Proposal from the Product List or Product Detail screen and make it an “Option”.



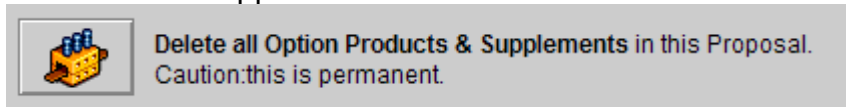
- All Supplements attached to the Option product will also be changed to an Option.

1 - Home Theater	5 Linn : Katan	Installation	T T	3	\$60	Option <input type="checkbox"/>
1 - Home Theater	5 Linn : Katan	Wire Labor - Bulk	T T	1	\$60	Option <input type="checkbox"/>

- The price of “Option” Products and Supplements will not be included in the Proposal totals.
- The Option Product prices will show up in the product description and an Option label will appear where the product price normally appears on all Proposal and CO reports and screens.

Zone - Area				Profit per Hour	Total Labor	Grand Total
Discipline : Category : Type		Qty	Make : Model	Description	Area Totals	
Home Entertainment System						
Zone 1 - Home Theater						20,856.98
Audio : Amplifier : Multi-channel		1 ea	Linn : 5125	Five channel power amplifier (Black)	2,750.00	
Audio : Speaker : Bookshelf		5 pr	Linn : Katan	*Option: \$995.00 pr Ext \$4,975.00	Option	
Audio : Speaker : Powered Subwoofer		1 ea	Linn : Melodik	Aktive isobarik bass extension	4,950.00	

- A Utility in the Proposal & Product List Utility screens can Delete all Option Products and Supplements.







- When converting a Proposal to a Project or a Pending Change Order to a Final Change Order... All Option Products & Supplements will be automatically deleted from the Project at that time so as not to confuse Project PO's, WO's and SI's.
- Users of the Custom Proposal Report module should upgrade their Reports file to this 5.4 version to take advantage of this new Options feature.

Enhancement – Proposal Pure Supplements; GUI Improvement

- Pure Supplements are Supplements that can be added to a Proposal without attaching them to any Product.

Zone 1 - Home Theater

Add  Products
 Add  Sets
 Add  Supplements

Discipline Cat.Type	Sort	Qty	Make : Model	Unit Sell Ext Sell
 Audio	a <input type="text" value="m"/>	1	Supplemental : Items	

- The Labor, Parts and Wire Supplements screens have been improved.
- Selecting an Area on the left portal enables you to Add a Pure Supplement to that Area on the right Portal.
- Adding Supplements to an Area now adds them to the correct area.
- Picking Areas now refreshes and displays the Supplements for that Area.
- The Products in the Selected Area show in the lower left portal.
- All Supplements attached and not attached to Products for the selected Area show in the lower right Portal.
- These features are the same for the Parts and Wire screens as well.

[illegible]

Enhancement – Proposal Speed Improvement

- Extensive work has been done to groom all SCPS database fields, relationships, layouts, scripts and value lists and significant improvements have been made in navigating, screen refreshing and report printing.

- All “Leave” buttons have been re-labeled to “Done”, except when leaving a module like Product Library etc.

Enhancement – Proposal; AB Tax and labels on Proposal Contract and Pricing screen.

- Proposal/Pricing/Tax Summary screen now breaks out A & B tax rates

Proposal Tax Summary & Rates					
Door Rates	Commissions	Home Entertainment System 1267.1-1.100			
Product Tax	Fees Tax				
Tax Summary	Sell	Tax A	Tax B		Total Tax
Equipment	\$44,235.89	\$1,769.44	\$221.18	=	\$1,990.62
Installation	\$4,223.33	\$168.93	\$21.12	=	\$190.05
Misc. Parts	\$1,448.33	\$57.93	\$7.24	=	\$65.17
Wire & Cable	\$7,405.40	\$296.22	\$37.03	=	\$333.24
Additional Fees	\$3,300.66			=	
Total	\$60,613.61	\$2,292.52	\$286.56	=	\$2,579.08

- Master & Proposal/Print Options screens now have a flag that can be set to AB Tax or Total Tax.

Show Sales Tax ☒ Yes ☐ No

Show Tax Totals

- Master & Proposal/Preferences screens now have Tax A & B Labels

Subtotal Labels	
Header Label	Electronics & Installation
Products	Equipment
Labor	Installation
Misc. Parts	Misc. Parts
Wire & Cable	Wire & Cable
Additional Fees	Additional Fees
SubTotal	Total
Tax A	PST Tax
Tax B	GST Tax
Tax Total	Tax
Grand Total	Grand Total

No Tax Subtotal
Total (Tax not included)

5 Subtotal
3 Subtotal
2 Subtotal
1 Subtotal

- The Proposal Contract can now show AB Tax or Total Tax depending on the setting of the Show Tax Total flag in the Print Options screen.

Equipment	\$44,235.89	Equipment	\$44,235.89
Installation	\$4,223.33	Installation	\$4,223.33
Misc. Parts	\$1,448.33	Misc. Parts	\$1,448.33
Wire & Cable	\$7,405.40	Wire & Cable	\$7,405.40
Additional Fees	\$3,300.66	Additional Fees	\$3,300.66
Total	\$60,613.61	Total	\$60,613.61
Tax	\$2,579.08	GST Tax	\$2,292.52
Grand Total	\$63,192.70	PST Tax	\$286.56
		Grand Total	\$63,192.70

Enhancement – Proposal Discipline, Area and Phase navigator

- New buttons on all of these screens enable you to go directly to any Proposal view without having to return to the Area Detail view.

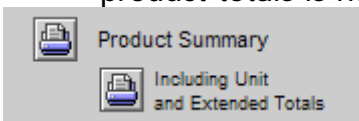
Discipline	Area	Phase	Proposal - by Discipline Subtotals
Discipline Subtotals	Area Subtotals	Phase Subtotals	John & Mary Smith
Discipline Grand Totals	Area Grand Totals	Phase Grand Totals	Home Entertainment System
			1267.1-1.100
Discipline			Sell GP% Cost

Enhancement – Proposal/Print Menu: Labor Supplement Reports

- Reverse Labor Time and Amount portals so the Labor Time portal shows first and then the Amount portal show next.
- Remove Degree of Difficulty percentage from this report.

Enhancement – Proposal/Print Menu: Product Summary Report with Unit and Extended totals.

- A new Proposal Product Summary report that shows Unit and Extended product totals is now available.



Enhancement – Proposal/Print Menu; Payments trap

- A warning message will now pop up when entering the Proposal Print Menu if the Total of the Payment Plan is different than the Proposal Total.

Enhancement – Proposal/Print Menu: Salutations (prefix) & Client Names

- Incorporate the new Contact Salutations (prefix) into Client Names on Proposals Client Print outs.
- Eliminate the Dear and comma in the Proposal Intro Letter if there is no Client first and last name in the Proposal.
- This enhancement extends into the Custom Reports 5.4 module.

Alt Billing		Proposal - Client Info	
		Lee & Kris Christenson North American Fly LTD Home Entertainment System 1289.1-1.100	
Client		Details	
Project	Contacts	Com Log	
Modify Client _____ Modify or Switch Contact		Numbers _____	
Prefix	First Name	Lee & Kris	
Mr. & Mrs.	Last Name	Christenson	
	Company	North American Fly LTD	
		Home _____	
		Work _____	

Home Entertainment System
for Mr. & Mrs. Lee & Kris Christenson North American Fly LTD



Dear Mr. & Mrs. Lee & Kris Christenson,

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

Enhancement – Proposal/Fees Report; Fees Total Label

- You can now change the Fees Total label on the Fees and Summary Reports, from the Master Preferences/Proposal/Fees and Proposal/Print Menu/Preferences/Fees screens.
- If there is no Fees Total amount then the label is automatically removed from the reports.

Grand Total Label
Project Specific Design, Engineering, Project Mgt & Labor

Home Entertainment System
for Mr. & Mrs. Lee & Kris Christenson North American Fly LTD



Area Summary	Grand Total includes Supplements & Tax
Atrium Grand Total	\$1,316.11
Project Specific Design, Engineering, Project Mgt & Labor	\$44.78

Equipment	\$750.00
Installation	\$117.50
Misc. Parts	\$255.00
Wire & Cable	\$125.00
Additional Fees	\$44.78
Total	\$1,292.28
Tax	\$68.61
Grand Total	\$1,360.89

Enhancement – Project Change Orders/Print Menu

- Pending CO's now have their own Print Menu with Print Options and print buttons for overviews, fees.
- Final CO's now have their own View Print Menu with print buttons for overviews, fees.
- Some Options in Final CO View Print Menu can now be modified.

Pending Change Order - Print Menu Options Print CO ? Home

John & Mary Smith

Home Entertainment System
1284.1c1-1.100

Change Order

Overviews

Fees & Services

Done

Change Order

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

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

4/26/2007 ☐ Report Date - Lock

Search Area

Products by Discipline

Install Location

Text - No Products

Enhancement – POS Quotations & Invoices

- Increase the Quotation and Invoice line items from 50 to 100.
- Move the Footer totals on Invoices and Quotations printouts to the bottom of the last page, instead of the bottom of the first page.
- Show zero's when line item amounts are 000.00 instead of blank.

Enhancement – Product Library; GUI features

- Clicking on the Phantom, Lab, Parts, Wire buttons will find all Products, in the Product Library, that have these Supplements attached to them.
- Auto Tag; this button will Tag all products showing in the list for Deletion or to Hide.
- Show Hidden; this button will show and/hide all Hidden products in the Library.

Product Library - Line List Utility ? Home

EME audio & video

Other Views **Inventory Control**

Phan **Lab** **Auto Tag**

Part **Wire** **Show Hidden**

Leave

Product Sets

Print Menu

Search Area

Products by Discipline

Install Location

Text - No Products

Enhancement – Log in Screen; Add User Location number.

1 - Select User	
User Name	Location
Dave Dowling	1
Jim Engandela	1
Joel Roberts	1
Jon Oster	1
Sandy Engandela	2

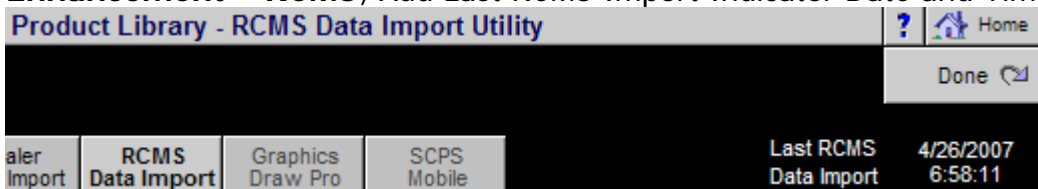
Enhancement – Main Logo Screen: Add Group to User Name



Enhancement – Quickbooks Integration

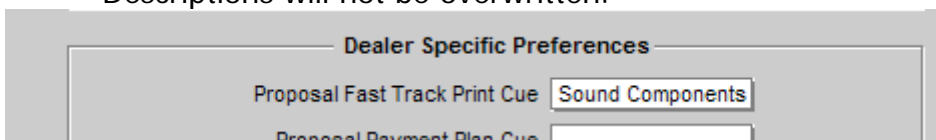
- SCPS Invoices & PO's now Add Products and Contacts in QB, if they doesn't exist there.
- Improved XML programming brings large SCPS invoices into QB faster.
- Increase QB Contact value list ID to accept more than 64 characters and generate a report that can be used to clean up QB Contacts that exceed 64 characters.
- QB can now be setup as either a Service or Inventory based company.

Enhancement – RCMS; Add Last RCMS Import Indicator Date and Time



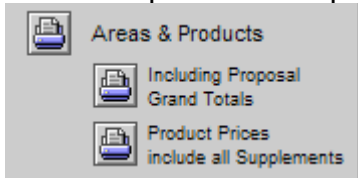
Enhancement – Sound Components

- Master Prefs/Other/Proposals; Fast Track Cue will print specific proposal sections.
- Product Library/Utility/RCMS Import – Importing of RCMS Product Descriptions has been removed so that modified SCPS Product Descriptions will not be overwritten.



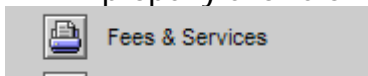
Fix- Proposal/Areas & Products Report with Supplements

- This report now includes the supplemental labor in product totals, when the "Show Product Prices including Supplement Prices" is checked in the Proposal Print Options.



Fix – Proposal/Print Menu/Fees Report: Fees Pricing

- Proposal Fees that are a percentage of Total Labor or Phase 1, 2, 3 now properly shows on the Fees report.

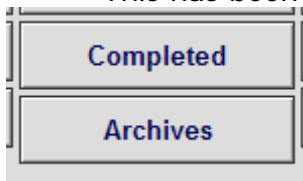


Fix – Project/Change Orders: Pending and Final CO reports;

- These reports now show the correct qty like kind products

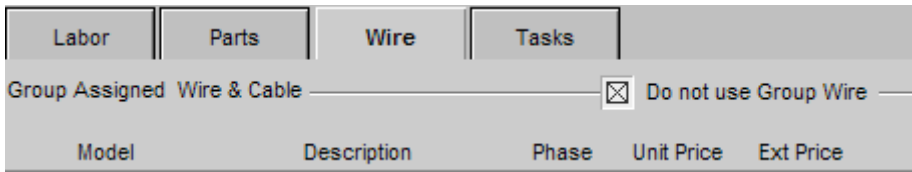
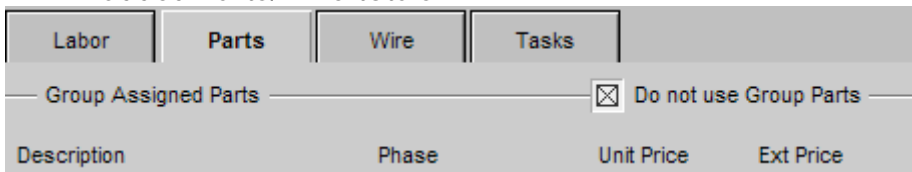
Fix – Completed and Archived Proposal Viewing; User access

- In some cases Users could not view the Completed or Archived Proposals. This has been corrected. (Sound Components)



Fix – Product Library; Product Detail Supplement & Installed Prices.

- When the "Do not use Group Parts/Wire" is checked the Totals on the Product Detail screen are now correct and show only the additionally added Parts/Wire totals.



Loaded Prices		Supplements		Installed Price	
\$750.00 Sell		■ Parts	\$255.00	■ Wire	\$125.00
40.0% GP%	■ Labor	Labor		Labor	
\$450.00 Cost	\$100.00	\$12.50		\$5.00	
				\$1,247.50	GP 40.8%

Fix – Proposal (Fav) Contacts; Pick the correct Contact

- When picking a Contact for a Proposal only the 1st contact in the list was getting chosen, instead of the Fav Contact that was actually checked. This has been corrected.

Fav Merge		Company		
SL		Prefix	First Name	Last Name
<input type="radio"/>	<input type="radio"/>	Mister	Tom	Burke
<input checked="" type="radio"/>	<input checked="" type="radio"/>		Tom & Kelly & Family	Burke
<input type="radio"/>	<input type="radio"/>		Molly & Tighe	Burke
<input type="radio"/>	<input type="radio"/>		Kelly	Burke

Fix – Follow-Up Module: Show all Proposals, Projects & Completed

- Change the portal key so all Proposal show in list and in descending order.

Select Proposal			
Pick	Proposal-Project CO	Client	Company
<input type="checkbox"/>	1289.1-1.100	Christenson, Lee & Kris	North American Fly LTD
<input type="checkbox"/>	1283.1-1.100	Callahan, Hayes	4/07
<input type="checkbox"/>	1282.1-1.100	Potter, Mike & Jessica	
<input type="checkbox"/>	1281.1-1.100	Werle, Neil & Gerri	
<input type="checkbox"/>	1280.1-1.100	Christenson, Lee & Kris	North American Fly LTD
<input type="checkbox"/>	1279.1-1.100	Townshend, Ann & Bob	

SCPS Version 5.3 Released: 3/5/2007

Enhancement – 90 minute Educational Overview Video

Users can now click on the Horizon logo on the Main SCPS screen or from the Prefs/Horizon screen and play a 90 minute video that will provide a very good overview of the SmartPartner software. This video has an index so users can go directly to the module they wish to watch.

Enhancement – Renew SmartPartner Subscription period to 120 days

Horizon has now increased the new Subscription code notification from 90 days to 120 days, to reduce this task from 4 times a year to 3.

Enhancement – Prefs/Proposal/Contracts: Add 3rd Proposal Contract

You can now have 3 different Contracts, each with their own label and you can select one of them from within any Proposal as well.

Enhancement – Prefs/Users/Access Rights: Inventory Control

New User Rights option to restrict access to the Inventory Control module is now assignable to each User in the Prefs/Access screen.

Enhancement – Prefs/Users/Access Rights: Proposal Add Tax Rights

New User Rights option to restrict Adding new Proposal Tax records is now assignable to each User in the Prefs/Access screen.

Enhancement – Prefs/Bookkeeping/Quickbooks: QB registration test

A new button on this screen will indicate if the QuickLink plug in is properly registered.


Enhancement – Prefs/Followup and FollowUp: 3 In-Progress Letters

Added 2 more In-Progress Letters for a total of 3. There is now one for each installation phase in both the Followup and Prefs/Follow modules. You can now have separate body text for these letters appropriate for each phase.

Enhancement – Pref/Company: Add Mgr, Titles and email fields

These new fields are important to fill out, because they are used in the various FollowUp letters.

	Name	Title	eMail
President	Jim Engandela1	President1	pres@1
Manager	Joe Manager2	General Manager2	mgr@2



Tag line The Quality Name in Service and Value

Enhancement – Proposal & Project Commissions: New Mechanism

Commission Rates can now be set individually for each User in the Master Preferences/Users/Access Rights/Commission screen.

Commission Rates can be assigned for all Subtotals: Equipment, Labor, Parts, Wire and Fees as a Percentage of Profit.

Overhead Percentage can be added to each users commission table to load the costs with Overhead Expenses.

Commission Rates can be Manually Adjusted within each Proposal, Pending Change Order, Final Change Order and Master Project if the User has Access Rights to do this. This is set in the Master Prefs/User/Access Rights screen.

<input checked="" type="checkbox"/> Modify Proposal & Project Salesman's Commissions	
---	--

Commissions Rates can be Automatically Updated to the Master Preferences Rates for any proposal or Project. This can only be done if you have User Access Rights privileges from the Commission screen within a Proposal or Project.

Commission reports can be generated for each Proposal, Pending Change Order, Final Change Order and Master Project from the Pricing/Commissions screen.

Reset Comm to Master Prefs		Proposal - Sales Commissions		Print	?	Home
		Tom Burke		Leave		
		Sunbelt Business Brokers				
		Home Entertainment System				
		1258.1-1.100				
Pricing	Labor Rates	Commissions				
Tax Summary	Product Tax	Fees Tax				
Commission Percentages are entered for each User in Prefs/Users/Rights/Commissions screen						
Commissions for: Jim Engandela A/V Specialist						
	Profit	- Overhead	Commission Percent of Profit	Commission Amount		
Equipment	\$14,347.62	1.0 %	2.0 %	\$284.08		
Installation	\$1,813.85	1.0 %	3.0 %	\$53.87		
Misc. Parts	\$374.67	1.0 %	3.0 %	\$11.13		
Wire & Cable	\$2,924.00	1.0 %	5.0 %	\$144.74		
Additional Fees	\$1,712.56	1.0 %	6.0 %	\$101.73		
Total Profit	\$21,172.70		Total Commission	\$595.55		

Enhancement – Proposal/Detail by Area Header: Improve GUI

Added an Area Text button for direct access into the Area Text screen

Moved the Payments button underneath the Pricing

Moved the Preferences button to the Print Menu screen.

Discipline	Area	Phase	Proposal - Detail by Area	Q View	Utility	? Home
Client	Areas	Fees	Tom Burke	Pricing	Purchasing	Leave
Project	Products	Area Text	Sunbelt Business Brokers	Payments	Work Orders	Tracker
Com Log	Supplements	Overviews	Home Entertainment System	Change Orders	Invoicing	Print Menu
			1258.1-1.100			
Zone - Area				Profit per Hour	Total Labor	Grand Total
Discipline : Category : Type			Qty Make : Model	Description		Area Totals

Enhancement – Proposal/Print Menu Header: Improve GUI

Added a Preferences button for direct access into the Proposal Preferences screen from the Print Menu screen.

Printer Setup	PDF Creator	Proposal - Print Menu	3/1/2007 <input type="checkbox"/>	? Home
Tom Burke				Report Date - Lock
Sunbelt Business Brokers				Leave
Home Entertainment System				Preferences
1258.1-1.100				Print Options
Proposals	Shop			

Enhancement – Proposal/Print Menu Header: Improve GUI

Added Subtotal and Grand Total buttons to all Discipline, Area and Phase screens for direct access into All screens.

Discipline	Area	Phase	Proposal - Detail by Discipline	Print	? Home
Discipline Subtotals	Tom Burke				Done
Discipline Grand Totals	Sunbelt Business Brokers				
	Home Entertainment System				
	1258.1-1.100				
Discipline					Grand Total includes
Zone - Area		Dept	Qty Make : Model	Description	Supplements & Tax

Enhancement – Proposal/Pricing: Reset Prices to Original Sell

Clear Percentage and Adjustment Kind fields when resetting the proposal to the Original Sell prices.

Enhancement – Proposal/Print Menu/Contract: Increase Contract size

Increase the size of the Contract Text field on the main Proposal Contract and the User Reports Contract to accommodate 6 pages.

Enhancement – Project/Purchase Orders: Inventory Qty On Hand

The Quantity on Hand of each product is now displayed below the Staged Qty field on each Product/Part/Wire on the PO screens. This qty will only be accurate if you use the Inventory Control in the Product Library and take a physical count and then use the SCPS Purchase Orders and Invoicing modules which debits and credits product qty.

Enhancement – Project Change Orders: Reformat Pricing layout

Both Pending and Final Change Order reports now show extended prices and are formatted like the Proposal Areas & Product reports.

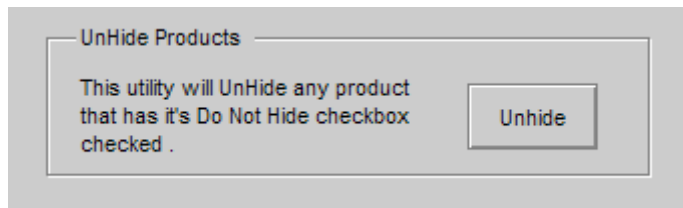
Enhancement – Product, Contact, Text, Info Library: Record Display

Each List View screen in these modules now displays the total number of records and the number of records currently viewed in the list. i.e. 3 of 100 Products instead of just 3 Products.

Enhancement – Product Library: Do Not Hide Products

If the Do Not Hide checkbox is checked on a product and you try to Hide it, you will now get a pop up notice of that fact.

In addition you can now UnHide all of your products that have their Do Not Hide checkbox checked, from the Utility 1 screen in the Product Library.



Enhancement – Contacts/Detail: New Salutation Mechanism

Added a very comprehensive method for adding Salutations to Proposals, Follow-up Letters and Contact Print Merged Letters/Faxes/Labels.

The first thing to realize is that any Name in the Contact Detail screen can be selected (the radio button next to each name) to be the FAV name or the Print Merge name.

The FAV name is the name that will show on the Contact List screen and on your Proposal reports, Follow-Up letters and POS.

Please note: The Salutation assignment does not currently function in POS, however you can add salutations in POS by using the POS Setup button on any POS invoice.

The Merge name is the name that will show on the Contact Print Merged Letters/Faxes/Labels. This enables you to use the Contact Print Merge feature to send Letters/Faxes/Labels to other names associated with your Contact, without disturbing the FAV contact assignment, which goes to your Proposals/POS/Follow-Up Letters.

Entering the desired Salutation next to each Name in the contract will add that Salutation to the name depending on the Fav (green) and Merge (Blue) flag at the top of the radio buttons.

The Flag Settings are:

Blank = No Salutation will be added to the name.

SL = Salutation + Last Name
 SFL = Salutation + First Name + Last Name
 F = First Name only

There are also Labels for both Fav (green) and Print Merge (blue) Labels so that you can see exactly how the Salutation and Label will look.

Contacts - Contact Detail

Tom Burke
Sunbelt Business Brokers

Labels
 Category **Vendor** Key Class Status Group
 PO Vendors ? Assign Products ID Staff **SE** Fav **A**

Fav Merge
☒ SL ☐ SFL

Salutation	First Name	Last Name	Title	eMail Address	eMail
Mr.	Tom	Burke		Per: tom@burke.to wk: tom@scc.to	
Mister	Tom & Kelly	Burke	Wife	kelly@burke.to	
	Molly & Tighe	Burke		Molly 6 and Tighe Kids tige	
	Kelly	Burke		Tom Birthday 7/27/00 & Molly	

Fav Proposal & POS Label
 Mr. Burke
 Sunbelt Business Brokers
 230 W. Carmel Valley Road
 Carmel Valley, CA 80813

Print Merge Label
 Mr. Tom Burke
 Sunbelt Business Brokers
 230 W. Carmel Valley Road
 Carmel Valley, CA 80813

Fav
☐ Home Phone 831-659-8595 ext cc
☒ Work Phone 831-624-5600 ext cc
☐ Kelly's 831-457-9838 ext cc
☐ Alt 1 ext cc

Speed Dial
 1

Enhancement – Contact/Print Menu: Contact Fields on all Reports

Update all Contact reports with newly added contact fields.

Enhancement – Contacts/Detail/Vendors: Display selected Makes

The Makes assigned to Vendors screen now displays the selected Makes on the left side of the screen. This makes it easier to see what makes have been assigned to that vendor.

Contacts - Assign Vendor

Find All Vendors

Vendor #

Selected Makes
 EME
 Linn
 Sony

Check the Makes that can be purchased from
Capitol Sales Company

Category **Vendor**

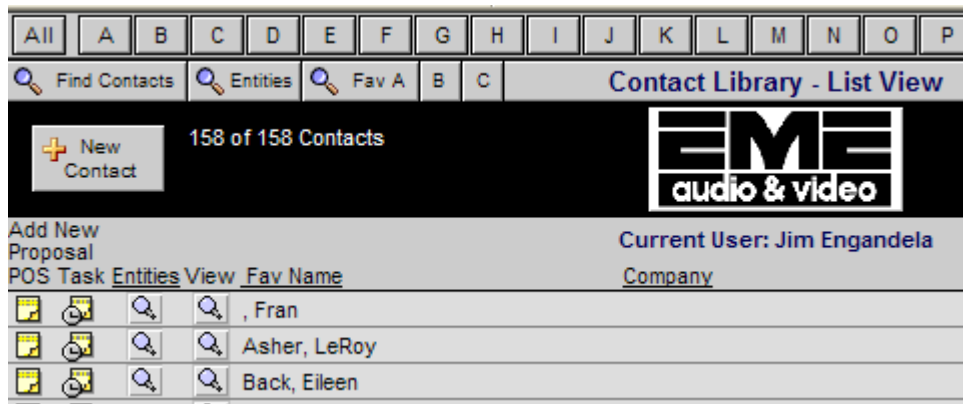
☐ Audioquest
☐ Better Cables
☐ Draper
☒ EME

Enhancement – Contacts/Utility: Set Fav flag to Primary Name

This Utility will set all of the contact Fav selections to the Primary Name.

Enhancement – Contacts/List and Contact Detail: Add New Proposal

You can now create a New Proposal or New POS for a Contact directly from the Contact List or Contact Detail screen.



Enhancement – Contacts/Detail: MapQuest maps

New Get MapQuest Directions button will query the internet using the contact address and return a MapQuest for that address.

A screenshot of the 'Address' form in the Contact Detail screen. The form has a 'Fav' section with a radio button and a 'Site Map' button. The 'Address 1' field contains '230 W. Carmel Valley Road Apt 22'. Below this is a 'Cross Street' field. The 'City' field contains 'Arlington Hts.', 'State' is 'CA', and 'Zip' is '939244C'. There are also fields for 'County' and 'Country' (USA). A 'Get MapQuest Directions' button is located at the bottom left.

Enhancement – Contacts/Detail: Quick Find Vendors button

Added a new Vendors button that will Find all of the Contacts where the Category = Vendor and sort by Company name.



Enhancement – POS/Service Order New Single Page Option

POS Service Orders can now be printed as a Single page or a 3 page Invoice. The 3 page option provides more area to write in job site information.

Fix – Proposal & Project/Shop Print Menu: Master Project Pricing Print

This report now only prints one copy instead of a copy for each record in the proposal.

Fix – Proposal & Project/Discipline/Area/Phase: Screens and Reports

All of these screens and the reports for Proposals, Projects, Pending and Final Change Orders now do not display overwritten Equipment, Parts, Wire, Labor or Fees subtotals.

Fix – Proposal/RCMS Contact

RCMS zip codes now automatically enter a – at the end of the zip code.

Fix – Project/Final Change Order/Pricing: Report

This report now properly shows all of the pricing subtotals and totals for Finalized Change Orders

Fix – Product Library/Product Detail: Loading Calc List Price

Fix the List Price - % feature so that the loaded sell price works properly when the Loading Calc flag is set to List Price - %.

Fix – Contact/Mailing Label: Add Tag Line

In the Contact/Print Menu you can enter a Tag Line to be added to your mailing labels. This now functions properly.

**SCPS Version 5.2
Released: 1/11/2007**

Enhancement – Proposal/Labor Supplements: Sort by Labor Type

A new option at the top of this screen enables you to sort the Labor Supplements as it is now (Zone, Make, Model) or by the Labor Type (Install, Programming, Bulk Wire etc). This makes it easier to see all like kind Labor records.

Enhancement – Proposal/Product Detail/Wire: No Labor check box

Enable the check box on each piece of Wire on a product so that in a proposal the option to not show labor on a piece a wire is available as it is in the Product Library.

Enhancement – Proposal/Print Menu/Summary Reports: Fees Label

The Fees Grand Total Label does not show, on the Proposal Summary Reports, if there are no Fees amounts. This has been done on the Proposal Summary reports by Discipline, Area and Phase. This feature has also been added to the Reports 5.3 version.

Enhancement – Proposal/Print Menu/Contract: Extra Text Message

Expand the Extra Text Message box so that it will accommodate 5 lines instead of 4.

Enhancement – Proposal/Print Menu/Areas & Products including SubTotals Report: Show Area Tax and Totals.

This report now shows Area Tax and Area Subtotal, with tax, if the “Show Tax” Print Option is selected. This modification has also been made to Custom Reports module version 5.3.

Enhancement – Project/Change Orders: Modify Date

Both Pending and Final Change Orders now have dates that can be modified in the CO Preference screen, just like Proposals. These dates can be locked as well using the Lock checkbox next to the date. If the Lock checkbox is not checked the date will revert back to today's date.

Enhancement – Project/Print Menu/Print Options: Adm Utility

If a user has Administration Access rights, he can click on the Adm Utility button in the upper left area on the View Print Option screen to change the Print settings on a Project. Normally this is not an option for Projects, because they the proposal has already been delivered to the client and should not be changed.

Enhancement – Project/Contact: Alt Billing & Sales Invoice

If you go into the Contact/Alt Billing screen and Pick a Contact and check “Bill this Contact”, this Alt Billing Contact will show up on your Project Sales Invoices. You can check/uncheck this Alt Billing Contact from the Sales Invoice screen as well.

Enhancement – Project/Client/Alt Billing: Enable changes

You can now switch or modify the Alt Billing name and address from within a Project.

Enhancement – Project/Alt Area: View All with Supplements

You can now click on the Alt Area View button in the Area Products screen to View all of the Areas, Labor, Parts and Wire Supplements for a Project. This is a View only screen.

Enhancement – Project/PO, WO, SI screens: Sort by Zone or Make

You can now sort Products, Parts and Wire on the PO, WO and SI screens by Zone/Area/Make/Model or Make/Model by using the underlined Header titles. This will help you with creating PO's, WO's and SI's.

Enhancement – Project/PO Invoice screen: Hide Prices

A Hide Prices button enables you to Show or Hide Prices on Purchase Orders has been added to the Purchase Order QuickBooks Invoice screen.

Enhancement – Project/Purchase Orders: Buyer phone extension

The Buyer phone extension now shows up next to the buyer phone number on the printed PO's. This comes from Master Prefs/Company info.

Enhancement – Project/Purchase Orders: Vendor Account Number

A field for Vendor Account numbers has been added to the Contact Detail screen, next to the Company name field. This Account number will show on printed Purchase Orders next to the Vendor name. This comes from the Vendor Contact.

Enhancement – Project/Purchase Order/Utility: Print Staging Reports

Clicking on the Utility button on the Project/Purchase Order screen enables you to print Product Staging reports for selected phases or all phases.

Enhancement – Project/Pending CO/Areas & Products: View Product Detail.

You can now click on a product in the Change Order portal and go to the Product Detail screen to modify products or supplements (parts, wire, labor)

Enhancement – Project/Product/View only: Change Product Status

You can now change the Status (C=changed, A=Added, D=Deleted) on a Project using the Admin Utility button on the Product View Only screen. This is only available to users that have Administration Rights.

Enhancement – Project/Change Order: Refine Area & Product screen

This screen has been fine tuned to provide more clarity and make it easier to use.

Enhancement – Project/Change Order: CO Alt View

You can now click on the Alt Area View button in the Change Order Area screen to View all of the Areas, Labor, Parts and Wire Supplements for the Change Order.

Enhancement – RCMS Project Pump Up: Delete Record feature

RCMS bookkeeping users can now delete a product record before pumping up the project into RCMS.

Enhancement – Product Library/Product Detail: Set Install Phase

The Primary Install Phase for products is normally set along with the Project Group in Master Preferences. You can now override this for just one product if you like, by clicking on the Install Phase and clicking on Change Item.

Enhancement – Product Library/Utility: Exchange Rate for Products.

When using the Exchange Rate feature in the Product Library, you now have the option to apply the Exchange Rate to all products in your library or only products that you have select and that show in your product list prior to entering the Utility screen.

Enhancement – Product Library/Detail: Optional Costs & Vendor.

You can now store optional cost and purchaseing vendor for each product.

Enhancement – Product Library/Detail: Phantom Product button.

Move the Phantom Product option to the top right of the screen and turn the check box into a button with a pop up message.

Enhancement – Product Sets Library/Print Menu: Set Detail with Costs

Add a new report that shows the cost, sell and list price of each product in a product set.

Enhancement – POS/Invoice/Setup: Switch Address 1 to 2 button

This button will switch address 1 to address 2 for this POS invoice.

Enhancement – POS/Service Order: Add page 2&3 with larger fields

Increase Service Order data entry field sizes for Description of Problem and Work Preformed, etc.

Enhancement – Contacts/Detail: Increase Contact Names from 4 to 8

Increase the number of names you can add (and select for printing) from 4 to 8.

Enhancement – Contacts/Detail: Add Key & Mail Merge Check Boxes

You can now have a Favorite name selected for a Contact that is different from the Mail Merge name that would go into Letters/Faxes in the Print Menu.

Enhancement – Contact/Utilities: Replace blank and duplicate keys.

This utility can be run if for some reason you have blank or duplicate contact keys which would prevent the contact from being used in a Proposal or POS invoice.

Enhancement – Contact/Contact Detail/Tracker

This module is used at Horizon for tracking our CPS and SCPS users. Let us know if you have a use for it and we can create customized field labels for you.

Enhancement – Project Manager: Inventory Control Printing

Instead of Previewing or Printing a single report format, you can now select a variety of reports from a Print Dock. This Print Dock is also available from the Product Library/Inventory Control/Print button.

1. Show only Products with a Qty on Hand
2. Show all Products including Hidden products
3. Show all Products not including Hidden products
4. Show all Products with negative Qty on Hand
5. Show only Hidden Products
6. Inventory ReOrder Report

Enhancement – Master Tracker/Add Tasks & Appointments: Creator

When Adding Tasks & Appointments you can now enter the creator of the Task or Appointment if you wish and the Details you enter now follow through to the Tracker Task as well.

Fix – POS: Pick Favorite Name instead of 1st name

When picking a contact to add a POS invoice SCPS now will pick the Favorite Contact name selected for that Contact instead of just the 1st Contact Name.

Fix – Proposal/Print Menu/Product Area and Summary report: Pix

Change the Pix field setting to Reduce or Enlarge to fix field size so that all pictures will display properly. Modified the Custom Reports module version 5.2 to this setting as well.

Fix – Proposal/Print Menu/Summary Reports: Subtotal Labels

Fix the Subtotal labels from sliding off the Subtotals when Fees are 0.

Fix – Project/Pending Change Order: Print out header

Make the header of the second page of the Pending Change Order match the first page.

Fix – Project/PO/Receiving: Receivers initials

The initials of the person receiving products on a PO now shows up properly on the PO invoice screen.

Fix – Master Tracker: Remove “No Tasks Found” message

If there are no Tasks or Milestones in your Tracker or none with today's or later date then you no longer will get these 3 pop up messages.

Fix – Contacts/Print Menu: Contact Detail Report: Email

Extend the email address space on these reports to accommodate longer email address.

Fix – Secure FM in OpenSCPS file

Enable Secure FM in the OpenSCPS file