SmartPartner Software

SCPS 2008 Upgrade Announcements
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 now to take advantage of the new features and to ensure trouble free operations. Please view the attached pdf, if this email doesn't display screen shots properly. Call Horizon if you need assistance with upgrading or implementing your SmartPartner software.

Download this new Upgrade and Help Guide from the Preferences/Horizon screen in your SmartPartner software. Upgrading to the latest version incorporates all past enhancements and fixes. Upgrading brings 100% of your data forward to the new version.

View past SCPS Revision Documents
http://www.horizon-software.com/download/SCPSrevisions_2008.pdf
http://www.horizon-software.com/download/SCPSrevisions_2007.pdf
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

Regards,
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President/Developer

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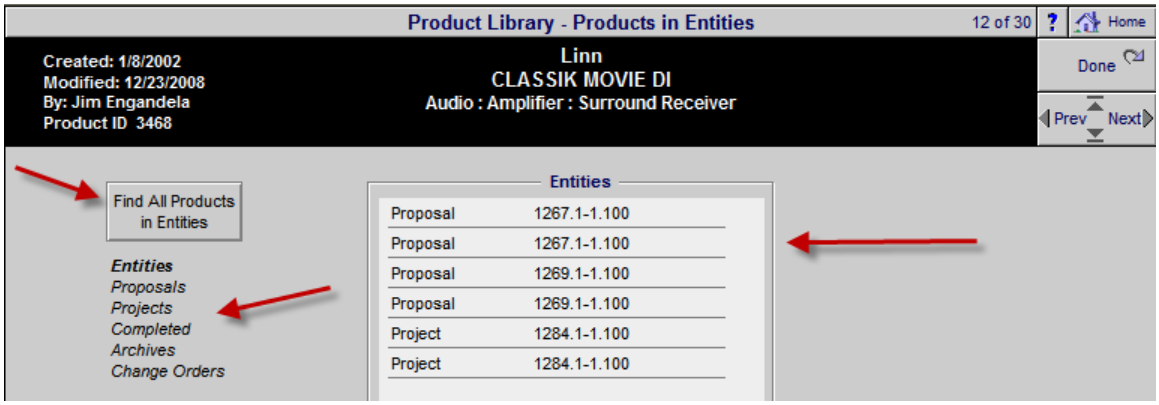
SCPS Version 7.2.2
Released: 12/24/2008

Enhancement – Product Library/Specs: Find Products in Entities

A new Utility button on the Product Detail/Specs screen enables you to view all of the Entity numbers (Proposals, Projects, Completed, Archived and Change Orders) that a Product in your Product Library exists in.

There is also a button that will find all of the Products in your library that exist in Entities and it will sort by Make & Model. You can use the Prev/Next button to cycle through these products.



Fix – Master Prefs/Proposals/Cover Page: Update all Proposals

This Update All Existing Proposals and Projects utility now works properly.

Fix – Product Library: Checking the Delete box on Products

In some cases checking the Delete checkbox on some records required you to click twice. This has been corrected.

Fix – RCMS Product Library/Utility: Import Products from RCMS

The product grooming that occurs during the Import of Products from RCMS has been improved to greatly increase the speed of this routine.

Fix – POS/Service Orders/RMS: Unique Data entry fields

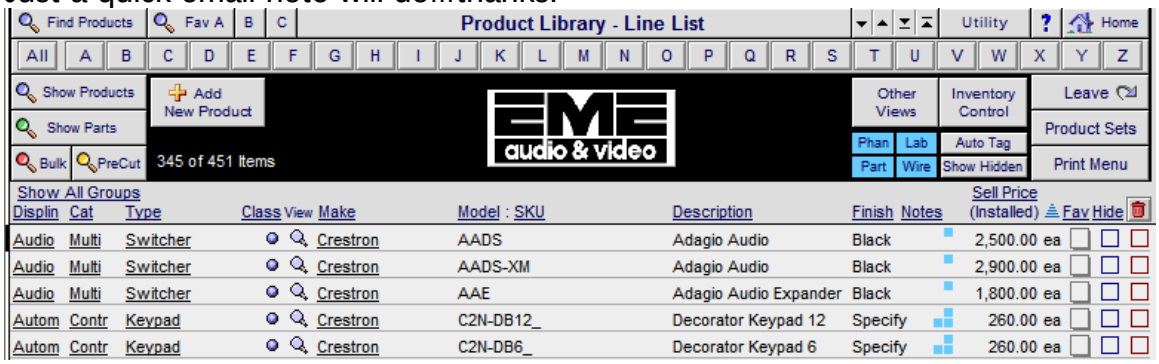
Fix these fields so that they can all contain unique values

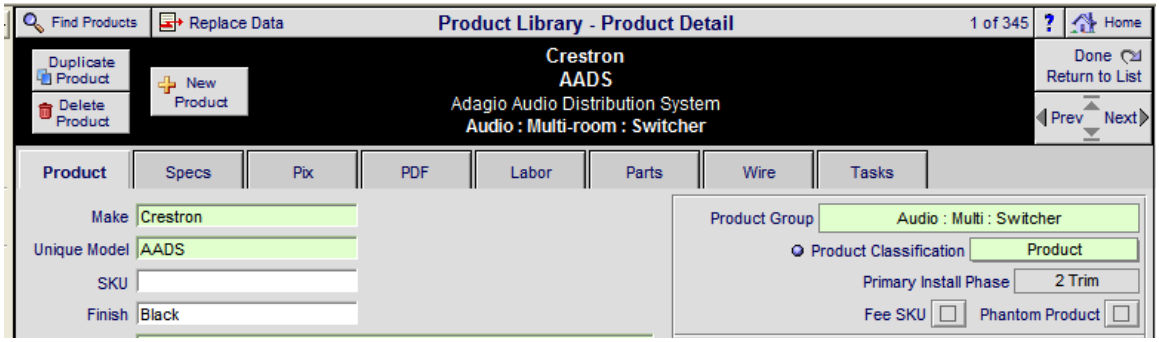
Visit Date:	1/1/2008	Hours:	1	Tech:	John	Notes:	Yes
Visit Date:	1/2/2008	Hours:	2	Tech:	Fred	Notes:	No
Visit Date:	1/3/2008	Hours:	3	Tech:	Paul	Notes:	Maybe
Visit Date:	1/4/2008	Hours:	4	Tech:	George	Notes:	Sometimes

SCPS Version 7.2
Released: 12/15/2008

Enhancement –Screen Readablity: One Shade Lighter

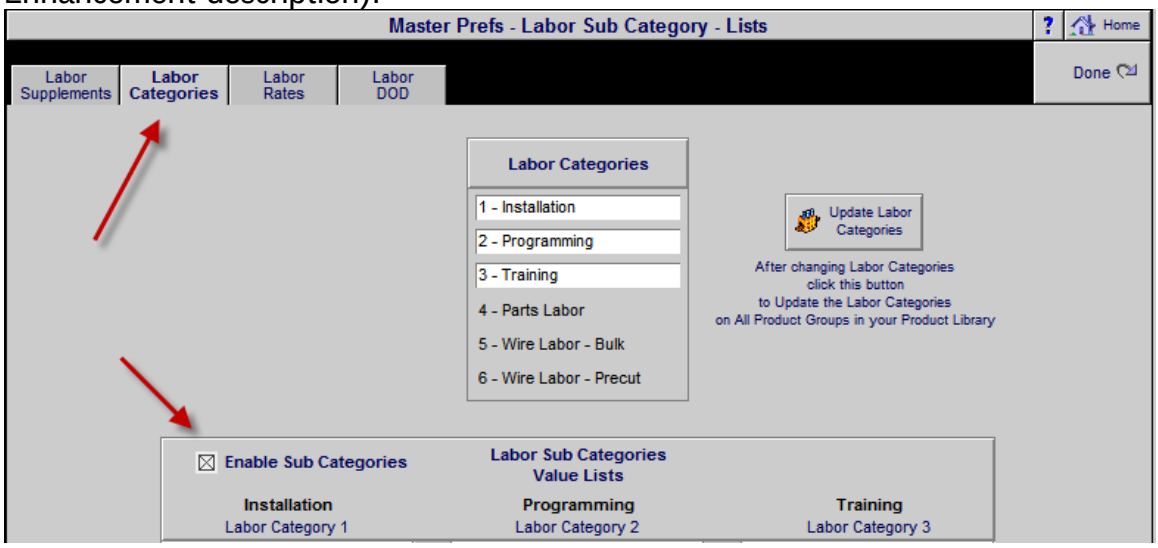
Here is a sample of a couple of screens that are one shade lighter. Both the headers and records are lighter and are easier to read on some monitors. Before making this change to every screen (several hundred) we would like some feedback from our SmartPartners. Please let us know if you like the lighter look. Just a quick email note will do…thanks.

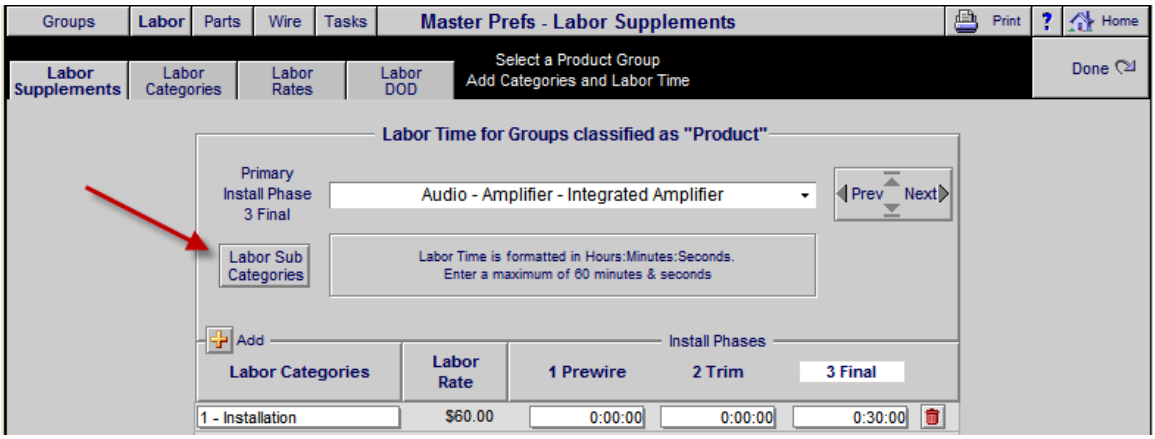




Enhancement – Master Prefs/Labor/Labor Categories: Enable Sub Categories

In order to use the Labor Sub Categories feature you can now enable it in the Master Prefs/Labor Categories screen. This gives you access to it in the Master Prefs modules. Each user can still be locked out of this feature in the Product Library and in Proposals by using the User Access Rights feature (see next Enhancement description).





Enhancement – Master Prefs / Users / Access Rights: Sub Groups & Discounts

You can now set the access rights for each user for the Labor Sub Group and Do Not Discount features in both the Product Library and in a Proposal.

Check All | Uncheck All | **User Access Rights** | Sort Users | Prev/Next | ? | Home

User Assignable Favorites ☐ Empty = "Global" Fav's

Proposal No "Add Product" Prompt ☐

Jim Engandela
President
Checked boxes have Access Rights
Unchecked boxes do not have Rights

Screen Magnification
Re-Login to set the size of the SCPS screen

Done | Commissions

Module/Screen Access
- ☒ Preferences
- ☒ Project Manager
- ☒ All Utility screens Except Proposals/Projects
- ☒ Proposal & Project Utility Access to Admin Utility
- ☒ Modify Proposal & Project Salesman's Commissions
- ☒ Proposal Custom Print Layouts
- ☒ CPS Custom Proposal System

Proposal & Change Orders
- ☒ Add ☒ Archive
- ☒ Add Supplements
- ☒ Delete Supplements
- ☒ Add New Tax Codes

Edit
- ☒ List Price ☒ Min Sell Price
- ☒ Sell ☒ Cost
- ☒ Pricing - Global Price Adjuster
- ☒ Pricing - Global Min Sell Adjuster
- ☒ Pricing - Hourly Labor Rates

Group Filter Assignment
Administrator
Administraters see all Proposals & Projects
Managers see their Proposals & Projects and the users that they manage
Users only see their Proposals & Projects

Proposals - Projects - Completed Archives - Change Orders
- ☒ Delete ☒ Duplicate

Convert Proposals - Projects
- ☒ Convert (Sell/unSell, Complete)

Archived Proposals
- ☒ Restore

Text Library
- ☒ Add ☒ Delete ☒ Duplicate

Edit
- ☒ Text Fields

Info Library
- ☒ Add ☒ Delete

Edit

Contacts
- ☒ Delete

Point of Sale
- ☒ Delete/Archive Invoices

Edit
- ☒ Sell Price

Product Library
- ☒ Add ☒ Delete ☒ Duplicate
Including Labor, Parts,Wire Supplements

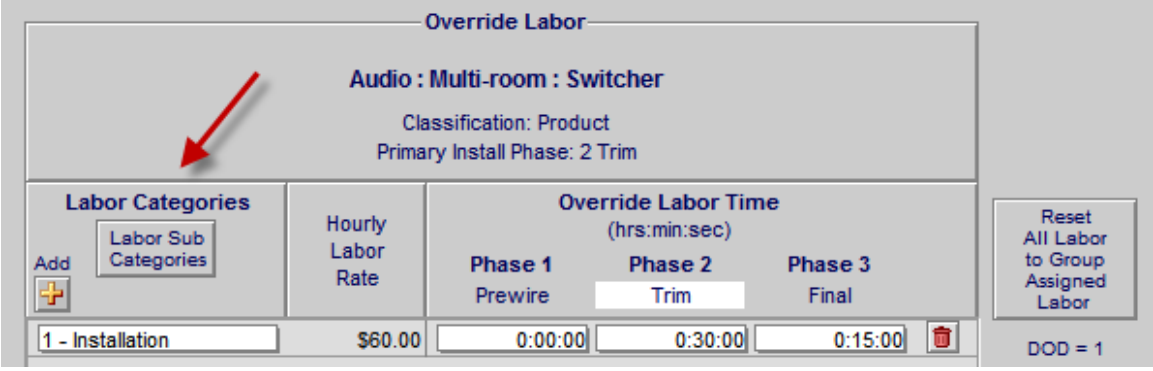
Edit
- ☒ List Price ☒ Min Sell Price
- ☒ Sell ☒ Cost
- ☒ Class, Groups & Phase
- ☒ Labor Sub Groups
- ☒ Price Adjusters
- ☒ Do Not Discount (All Products)
- ☒ Product Detail Fields
- ☒ Specifications Fields
- ☒ Inventory Control Module

Product Group: Audio : Multi : Switcher
Product Classification: Product
Primary Install Phase: 2 Trim
Fee SKU ☐ Phantom Product ☐

? Alt PO Vendor
Purchasing Lead Days: 7 Cost Value
Optimum On-Hand Qty
ReOrder Point
Inventory Qty On-Hand
Qty to Order

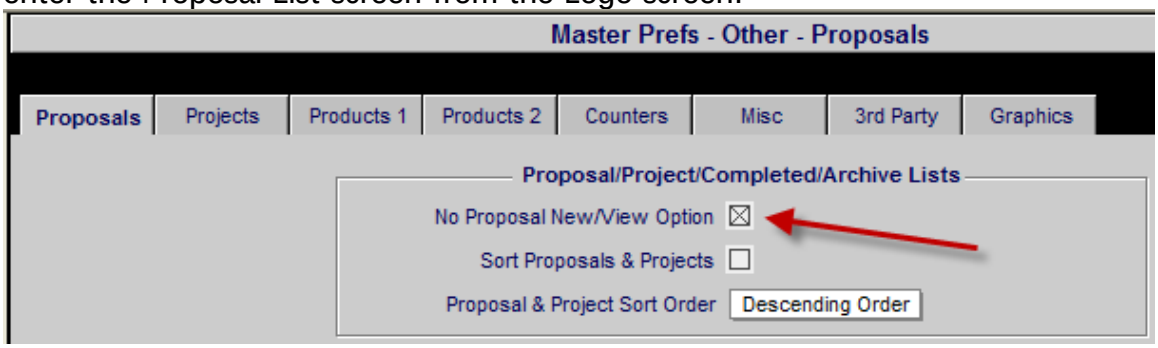
Tax A: T + Tax B: T
Proposal Product Sort: m Favorite

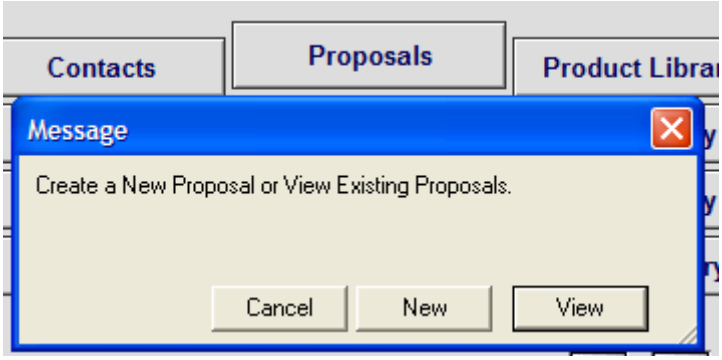
New Product Flag ☐ Do not Delete ☐
Hide this Product ☐ Do not Hide Product ☐
Issue Staple Up Card ☐ Do not Discount ☐



Enhancement – Master Prefs/Other/Proposals: New/View Option

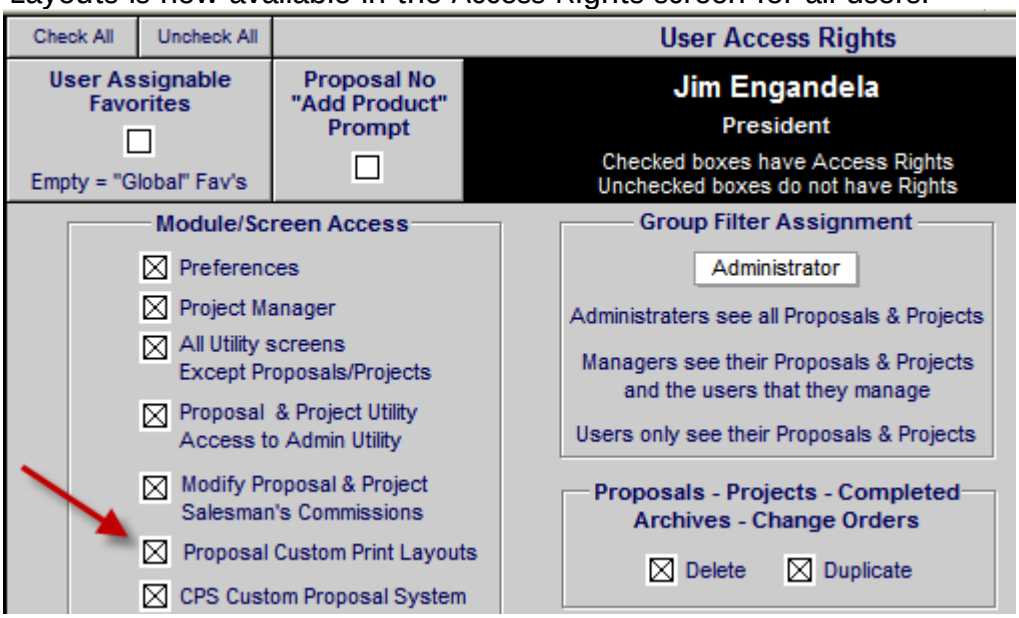
You can now choose to not show the New or View pop up selection when you enter the Proposal List screen from the Logo screen.

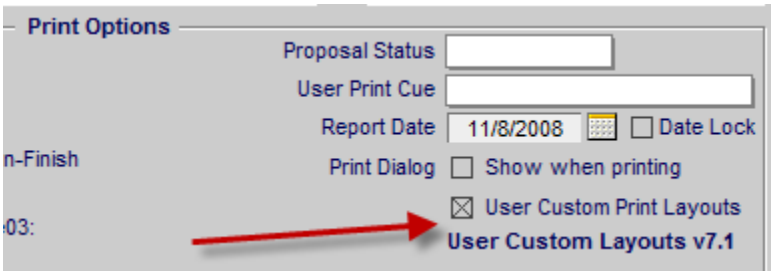




Enhancement – Master Prefs/Users/Rights: User Custom Print Layouts

Access Rights for changing the Option to print from the Proposal User Custom Print Layouts is now available in the Access Rights screen for all users.



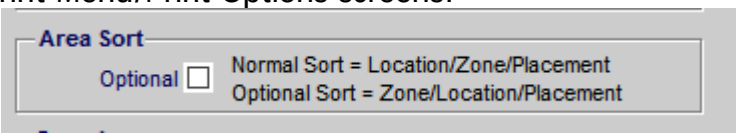


Enhancement – Master Prefs & Proposal Prefs: Optional Area Sort Order

You can now change the sort order of your Proposal Areas from the normal sort order to the optional sort order.

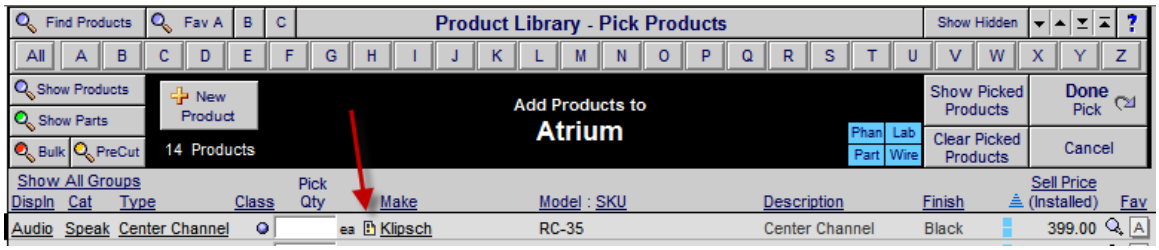
(Location/Zone/Placement to Zone/Location/Placement)

This can be changed in the Master Preferences/Proposals/Print Options and in the Proposal/Print Menu/Print Options screens.



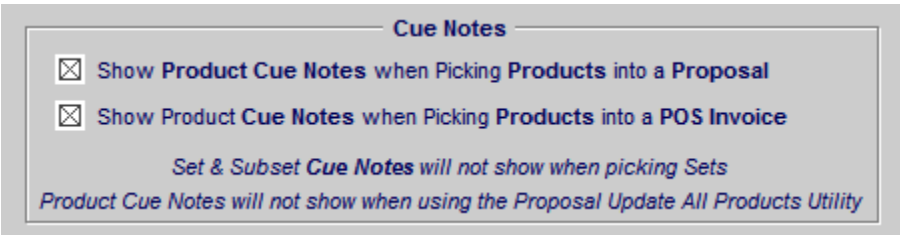
Enhancement – Proposal+POS: Show Cue Notes when picking products

Product Cue notes are indicated by the yellow ! icon next to a product and you can manually click on this icon to show the cue note. You can also set preferences to show these cue notes automatically when picking products.



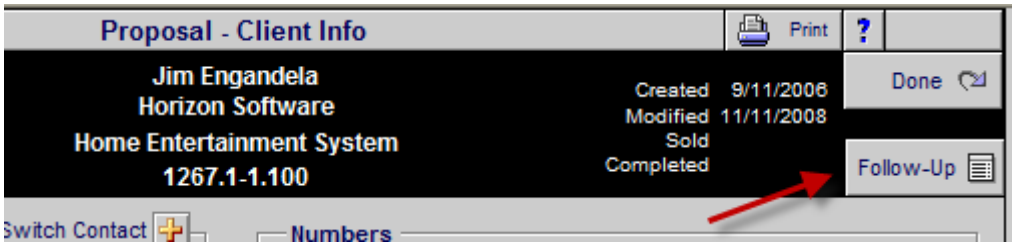
In the Master Prefs/Other/Product 1 screen you can choose the preferences for showing Cue Notes when picking products. You can choose to Show the cue notes when picking products into a Proposal or a POS invoice. Please note these special conditions.

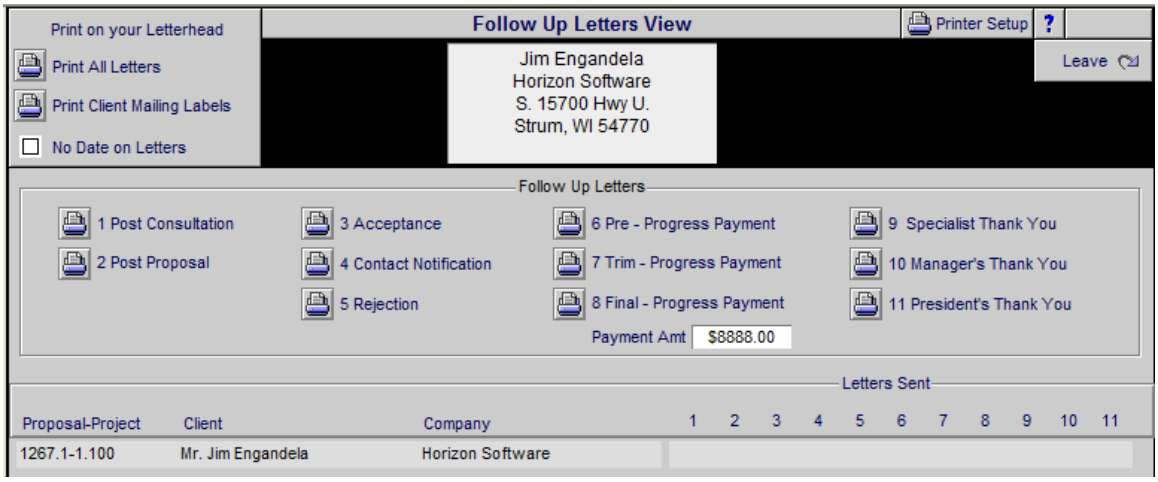
1. *Set & Subset Cue Notes will not show when picking Sets*
2. *Product Cue Notes will not show when using the Proposal Update All Products Utility*



Enhancement – Proposal/Client Screen: Follow Up Letters

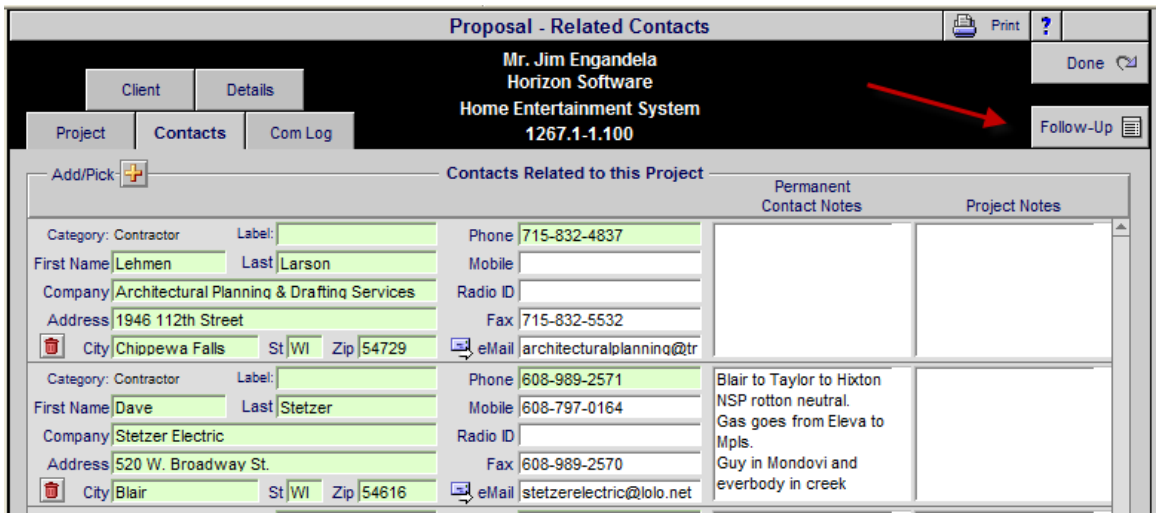
Clicking the Follow-Up button on this screen enables you to print Follow-Up Letters directly for this client.





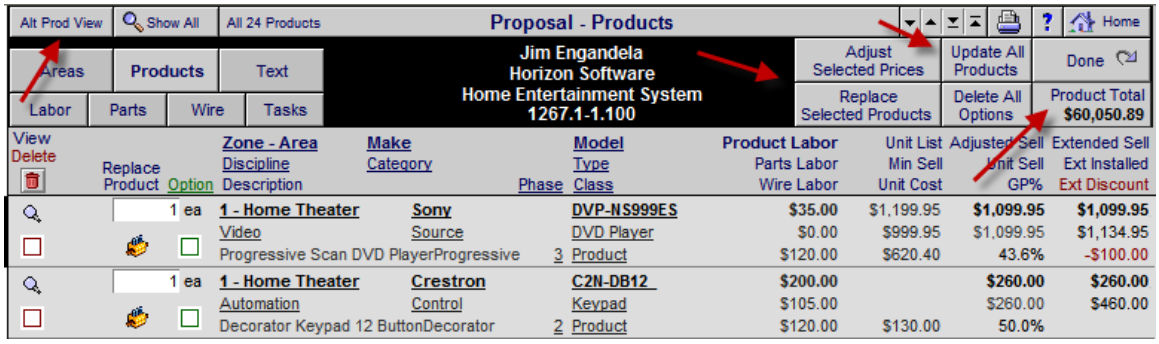
Enhancement – Proposal / Related Contact Screen: Follow Up Letters

Clicking the Follow-Up button on this screen enables you to print Follow-Up letters for all of the Related Contacts on this screen.



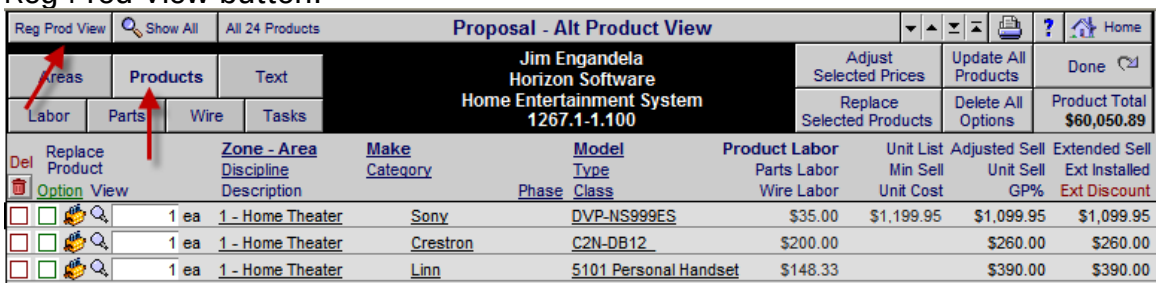
Enhancement – Proposal/Products: Consolidate Product Utilities

All 4 Product Utilities are now consolidated on this screen instead of having to go to a separate Utilities screen. Also the Total Product Price is now displayed at the top of the screen and this price reflects all of the products on this screen so you can click on any underlined button and get a total for any group of products you select.



Enhancement – Proposal/Products: Alt Product View

This new screen provides an alternate view of all of the Products in your Proposal in a condensed list. All Utilities and buttons are fully functional. You can return to the regular Product List screen by clicking on the Product tab or the Reg Prod View button.

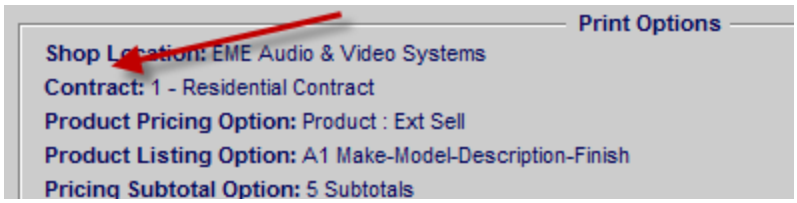


Enhancement – Proposal/Print Options: Show Option Prices

A new option for Option Prices has been added that will override the Print Option Pricing settings and always show the Price of the Option products in the Product Description.

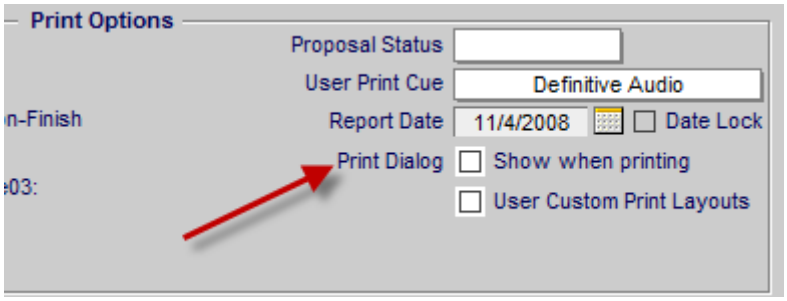
Enhancement – Proposal/Print Menu: Show selected Contract

At the bottom of the Proposal Print Menu the Selected Contract in Print Options is displayed.



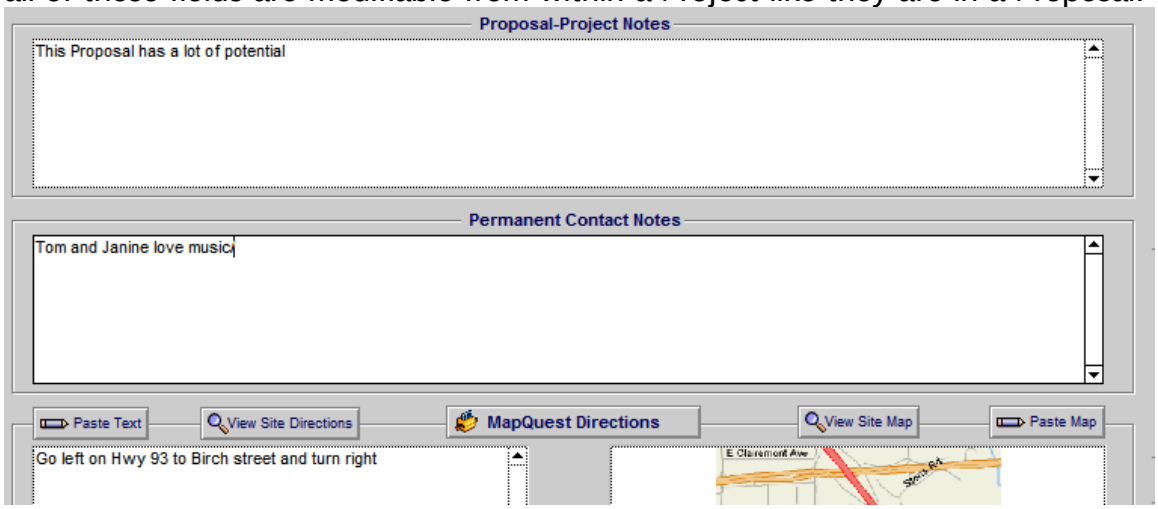
Enhancement – Proposal/Print Menu: Show Print Dialog when printing

You can now check the Print Dialog box if you want to show the Print Dialog window when printing your documents.



Enhancement – Project/Details: Project/Contact and Site Map

The size of the Project Contact Notes and the Site Map have been increased and all of these fields are modifiable from within a Project like they are in a Proposal.

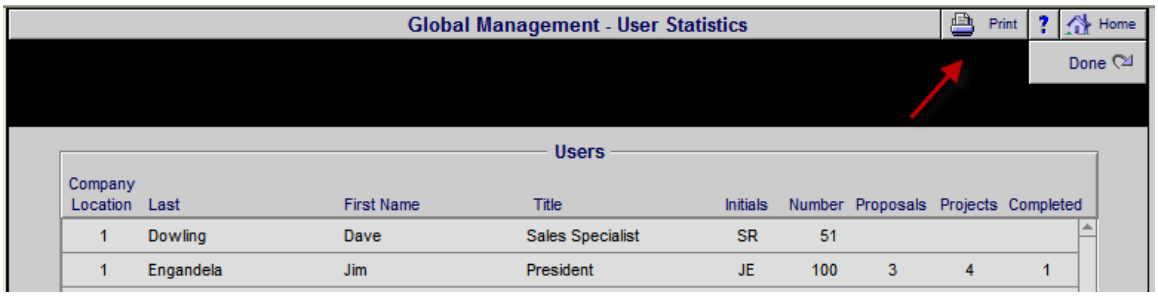


Enhancement – Project/Work Order: Site Directions

The Site Directions on the Project Work Orders has been increased to accommodate more text.

Enhancement – Project Manager/User Statistics: Print Report

You can now print a report of the Users Statistics. We are interested in adding more user statistics to this screen and report. Please email your suggestions to Horizon.



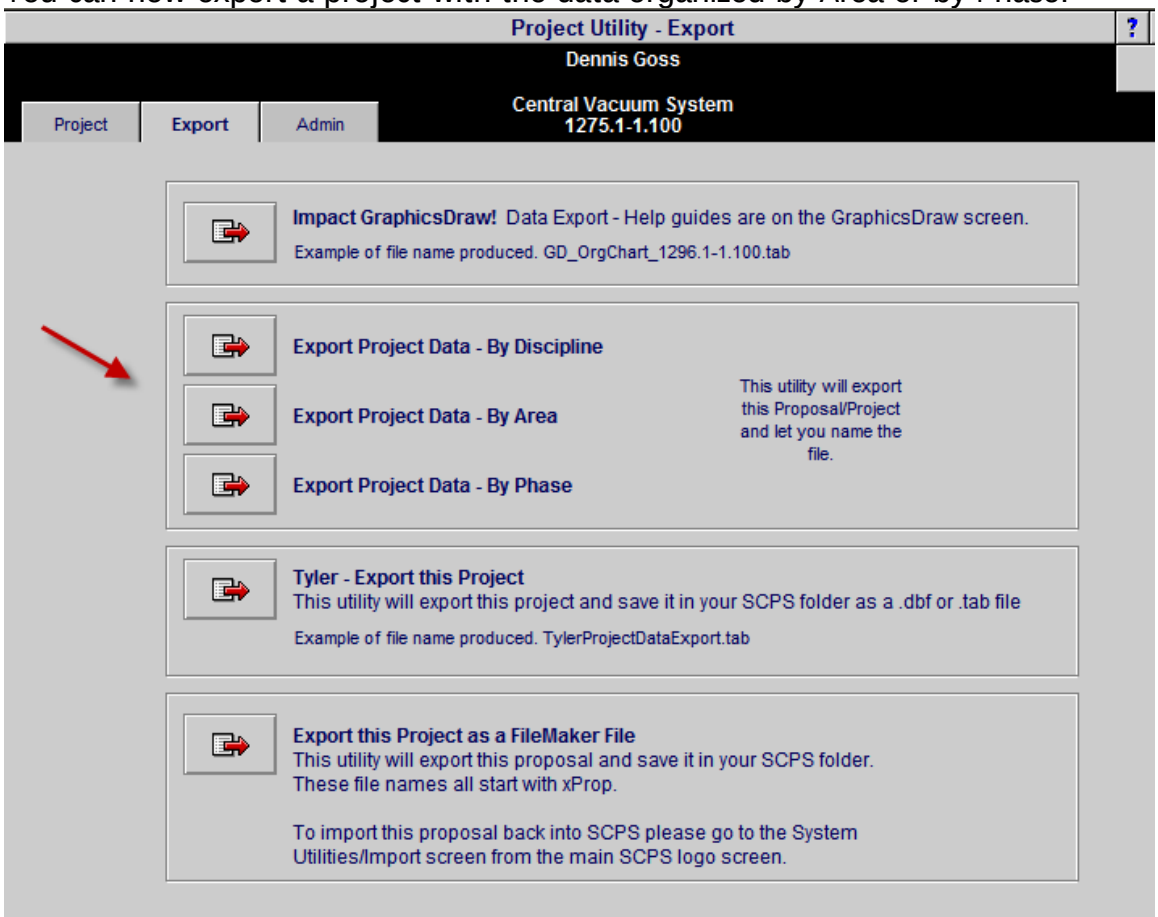
12/8/2008

User Statistics

Company Location	Last Title	First Name Initials	Number	Proposals	Projects	Completed
1	Dowling	Dave				
	Sales Specialist	SR	51			
1	Engandela	Jim		3	4	1
	President	JE	100			

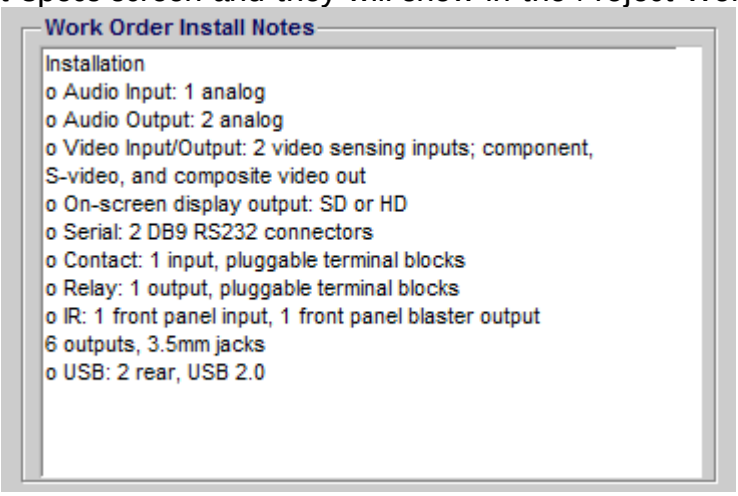
Enhancement – Project / Pricing / Export: Export by Area or Phase

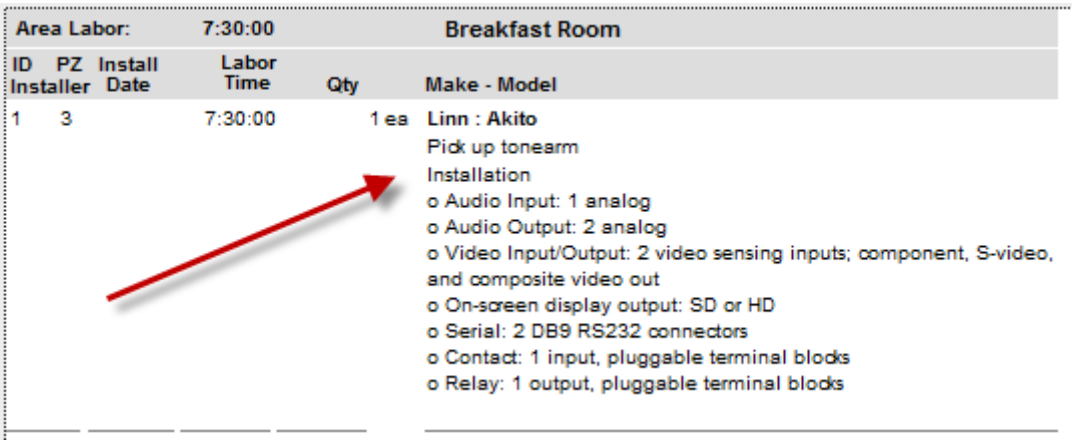
You can now export a project with the data organized by Area or by Phase.



Enhancement – Product Library/Specs/WO Install Notes

You can now enter Work Order Installation Notes into a field in the Product Library/Product Specs screen and they will show in the Project Work Order.





Enhancement – Product Library/Product Specs: Product Spec Notes

You can now enter Product Specification Notes into a field in the Product Specs screen and these notes will appear in your Proposal Product Spec screen and on the Print Menu/Shop: Product Specifications Report.

Replace Data | **Product Library - Specifications** | 1 of 344 | ? | Home

Created: 1/8/2002
Modified: 11/10/2008
By: Jim Engandela
Product ID 2592

Linn
Akito
Pick up tonearm
Audio : Source : Phono

Done
Return to List
Prev Next

Product | **Specs** | Pix | PDF | Labor | Parts | Wire | Tasks

General

Finish: Black
Weight:

Warranty

Factory Warranty: 5 years Parts & Labor
Extended Warranty:

Dimensions

○ HWD ○ WHD

	Height	Width	Depth	Diameter
Product Dimensions				
Cut Out Dimensions				

Rack Spaces: 1
Box Type:

Power Consumption

	Consumption	Amp Draw
AC Power		
DC Power		

Power Output

Power Output watts per channels @ ohms
Power Output watts per channels @ ohms
Power Output watts per channels @ ohms

Installation Issues

Mounting Height: Distance from floor

Work Order Install Notes

Product Specification Notes

Connections
o Audio Input: 1 analog
o Audio Output: 2 analog
o Video Input/Output: 2 video sensing inputs; component, S-video, and composite video out
o On-screen display output: SD or HD
o Serial: 2 DB9 RS232 connectors
o Contact: 1 input, pluggable terminal blocks
o Relay: 1 output, pluggable terminal blocks
o IR: 1 front panel input, 1 front panel blaster output
6 outputs, 3.5mm jacks
o USB: 2 rear, USB 2.0

11/10/2008

EME Audio & Video Systems - Confidential Report

Product Specifications

Jim Engandela

Home Entertainment System

1327.1-1.100

Page 1

AUDIO

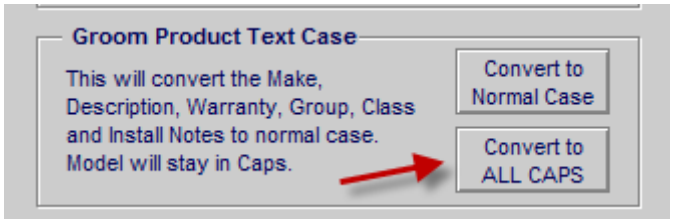
1 ea	Linn - Akito - Pick up tonearm		
Finish	Black		
Dimensions			
Cut Out Size			
Rack Spaces	1	Box Size	1
Mount Height			
Weight		Amp Draw	
AC Power			
DC Power			
Spec Notes	Connections o Audio Input: 1 analog o Audio Output: 2 analog o Video Input/Output: 2 video sensing inputs; component, S-video, and composite video out o On-screen display output: SD or HD o Serial: 2 DB9 RS232 connectors o Contact: 1 input, pluggable terminal blocks o Relay: 1 output, pluggable terminal blocks o IR: 1 front panel input, 1 front panel blaster output 6 outputs, 3.5mm jacks o USB: 2 rear, USB 2.0		

Enhancement – Product Library & Proposal: Product Spec Notes

The Product Spec Notes field has been expanded to accommodate more text.

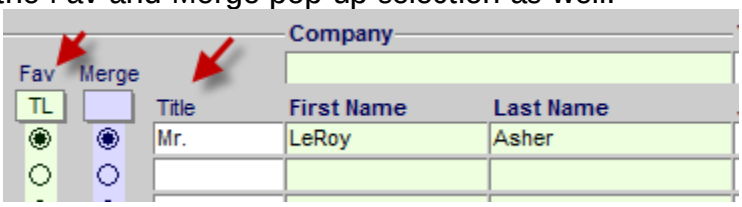
Enhancement – Product Library/Utility/Utility 1: Convert Text

This utility now properly converts all products in your product library to Upper case including the product Groups.



Enhancement – Contact/Contact Detail: Fav and Title

The label Salutation has been changed to Title on all screens and this new label is reflected in the Fav and Merge pop up selection as well.



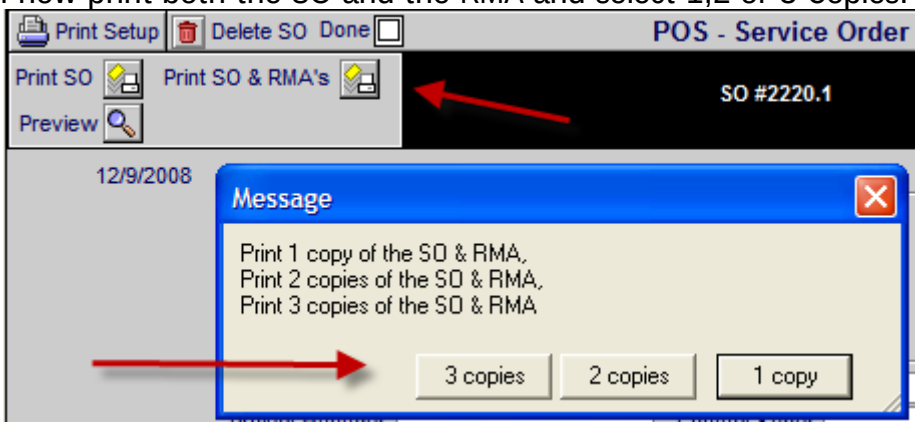
Enhancement – Contact/Detail: Increase Phone Field length

Increase the size of the phone fields on all screens

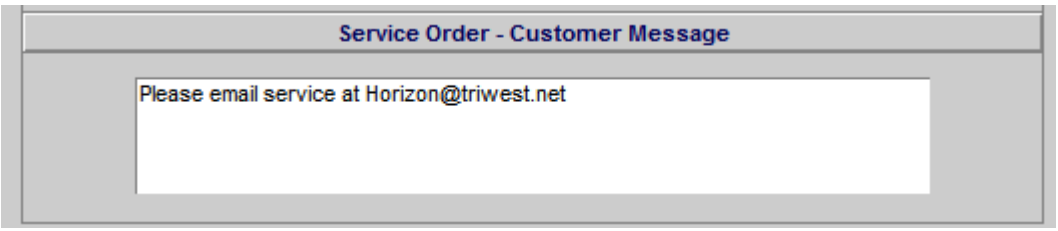
Enhancement – POS/Service Orders and RMA's

-Date now shows on the Printed Service Order and RMA.

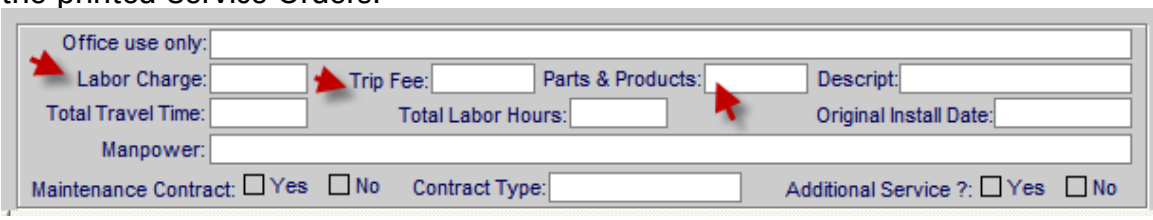
-You can now print both the SO and the RMA and select 1,2 or 3 Copies.



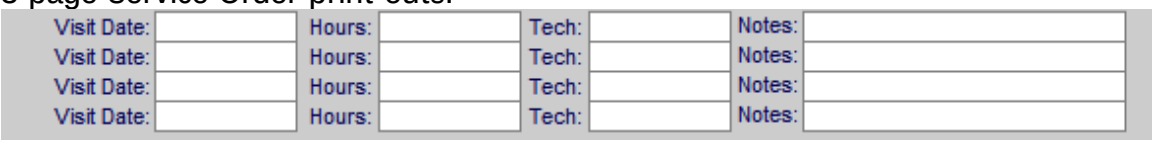
-A message can be added to your Service Order as a default for newly created POS SO's in Master Prefs/POS screen and modified in the POS SO/Setup screen.



-These labels have been changed at the bottom of the Service Order screen and the printed Service Orders.



-These fields have been added to the Service Order screen and both 1 page and 3 page Service Order print outs.

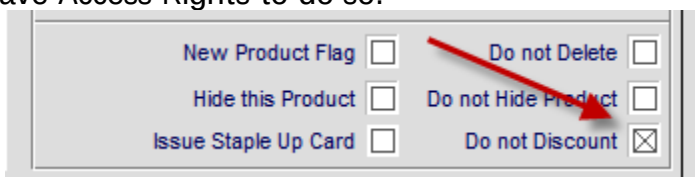


Enhancement – Mac Users – Optimize Windows

Mac Users using OSX will now have all of the SCPS database windows optimized when they open SCPS. This prevents multiple database windows from opening in separate positions on their desktop. There is also an Optimize All Windows button on the Master Prefs/FileMaker screen to run manually at any time.

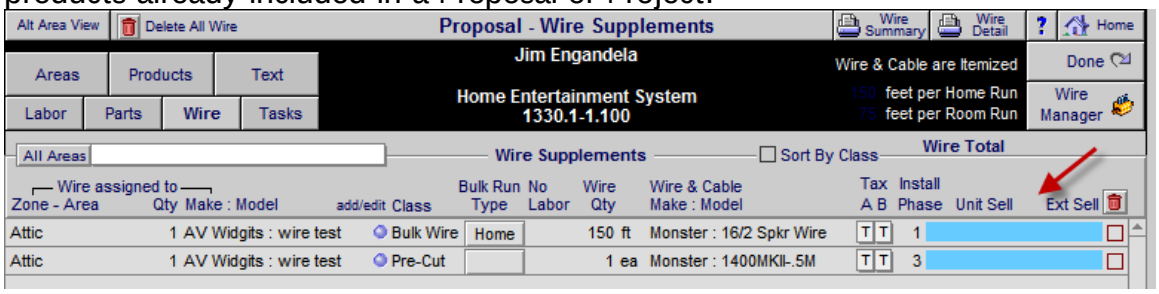
Enhancement –Proposal/Product Detail: Do not Discount

If the "Do Not Discount" box is checked then this product cannot have its Sell Price changed. In addition the Global Proposal discount Utility will not change the price on this product. The check box can be set in the Product library on a product if you have Access Rights to do so.



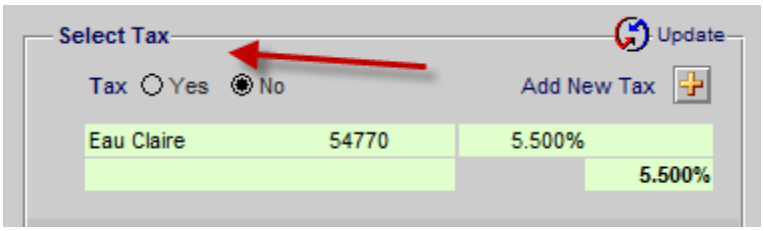
Fix – Proposals/Areas & Products: Adding Phantom Products with Wire

When adding a Phantom Product that has Wires, to a Proposal the price of that wire becomes the Product Price and is removed from the Wire Supplement Price. This will happen to all newly picked Phantom products and not Phantom products already included in a Proposal or Project.



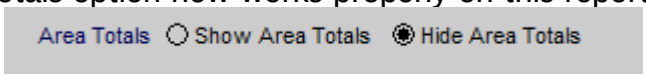
Fix – Proposal/Duplicate: Retain Proposal Tax Setting

Duplicating a Proposal now retains the Tax "yes/no" Option of the Original Proposal.



Fix – Proposal/Print Options: Hide Area Totals on AP report

Hiding the Area Totals option now works properly on this report.



Fix – Horizon Screen from Horizon Logo's

Accessing the Horizon Screen from the Login screen, the Main Logo screen and the Alternate Logo screen now takes you to the proper screen and returns you to the proper screen.

Fix – RCMS: Master Prefs/Auto Product Import

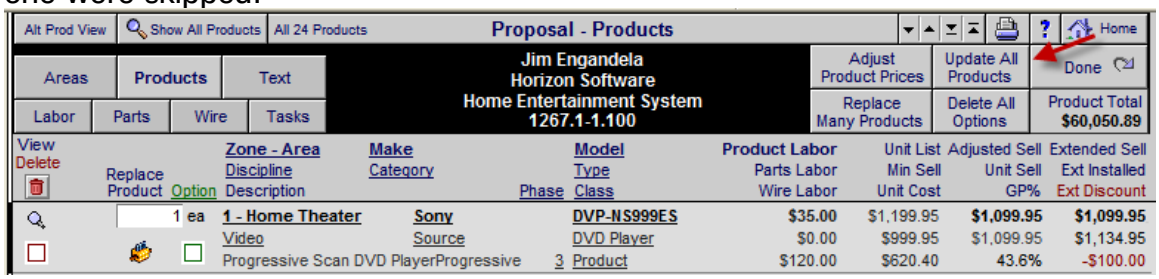
Change the script call to run the Auto Product Import from the RCMS bookkeeping system.

Fix – RCMS: Product Library/Import Products: Do not delete

Checking the “Do not Delete” flag on a product now takes precedence over the global Hide/Delete option in Master Prefs and will not delete this product during the importing routine from the RCMS database.

Fix – Proposal/Products/Update Product Utility: Fix

This utility was not updating all products if your Products contained Pure Supplements or if the Product longer existed in your Product Library or if the Product was renamed. This has been corrected. In addition, Products that are not updated are now flagged on this screen as “Not Updated” so you know which one were skipped.



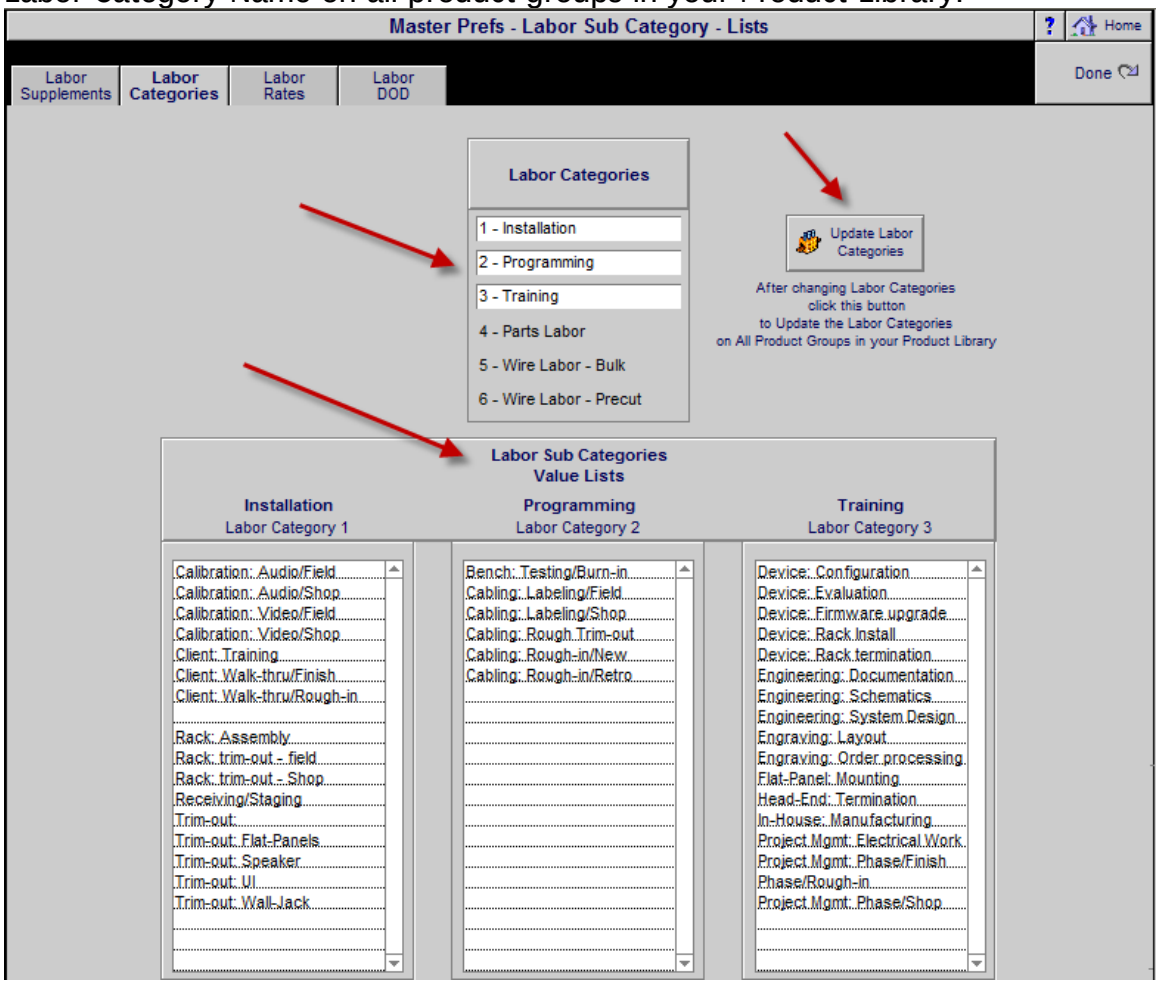
Fix – Logo Screen/Forms/Consultation Form: Adjust Margins

All of the left print margins on the Consultation and Blank Change Order forms have been increased making it easier to put these forms into binders.

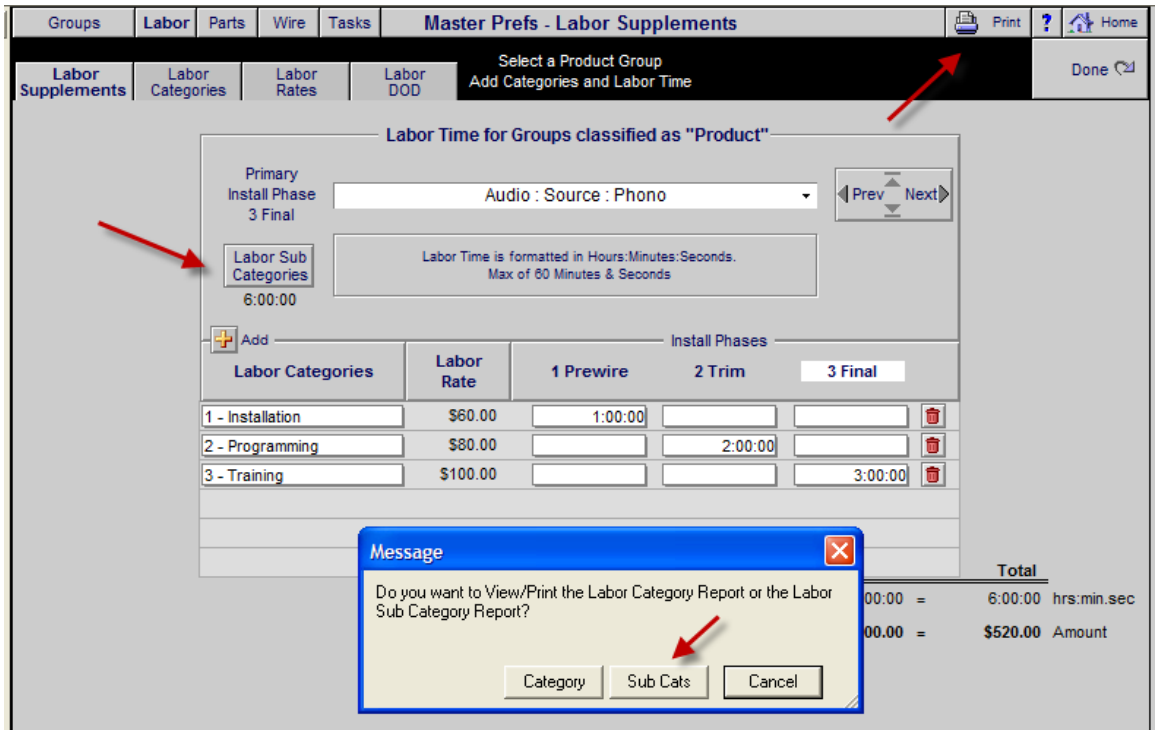
SCPS Version 7.1
Released: 11/3/2008

Enhancement – Prefs, Products & Proposals: Labor Sub Categories

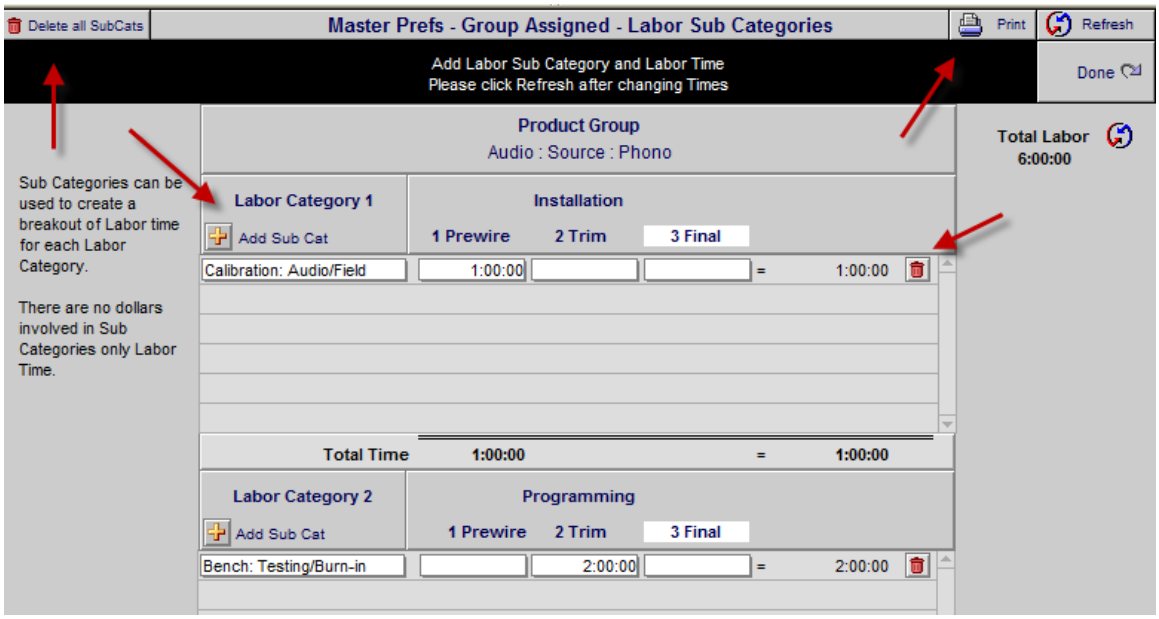
The SmartPartner software has 3 user assignable Labor Categories. You can now add unlimited Labor Sub Categories to these 3 Labor Categories. These Labor Sub Categories can be used for tracking labor for each Labor Category. The total time of each Labor Category is the sum of its Sub Categories. Sub Categories are intended for shop use and keep track of labor time, not labor dollar amounts.

- Create Pop Up Value Lists in Master Prefs/Lists/Labor
- This new screen enables you to define Labor Categories and Sub Categories.
- Use the "Update Labor Categories" button to automatically update the Labor Category Name on all product groups in your Product Library.
- 

- Add Labor Sub Categories to Product Groups in the Master Prefs/Labor screen.
- Use the Labor Sub Categories button to add Sub Category labor.
- You can Print All of the Labor Sub Categories for All Product Groups if you wish.



- You will only be able to add Sub Categories to existing Labor Categories.
- You can delete individual Labor Sub Categories or Delete All Sub Categories.
- You can print a report of just this Labor Category if you wish.
- When you click on the Done button the total Sub Category Labor times will be assigned to the Labor Categories.



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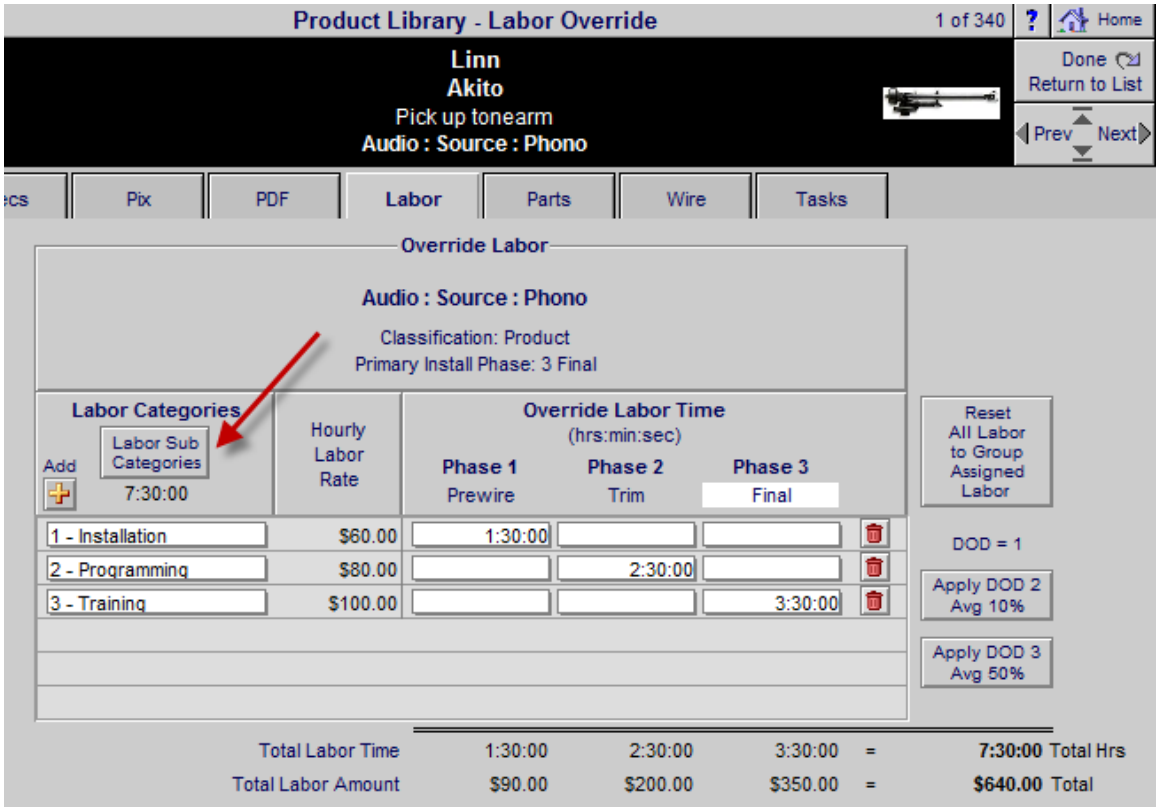
Labor Sub Categories by Product Group

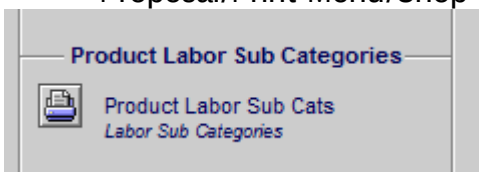
Audio - Amplifier - Surround Receiver				
Totals:	**1:00:00**	**4:00:00**	**6:00:00 =**	**11:00:00**
1 - Installation				
Calibration: Audio/Field	1:00:00			**1:00:00**
Calibration: Audio/Shop		2:00:00		**2:00:00**
Client: Training			3:00:00	**3:00:00**
2 - Programming				
Cabling: Labeling/Shop		2:00:00		**2:00:00**
3 - Training				
Project Mgmt: Phase/Shop			3:00:00	**3:00:00**
Audio Multi-room Keypad				
Totals:	**7:00:00**	**2:00:00**	**3:00:00 =**	**12:00:00**
1 - Installation				
Calibration: Audio/Shop	1:00:00			**1:00:00**

- In the Product Library you can view Sub Cats assigned to a Product Group.
- You can also change Add or Change Sub Cats on Products using the Engage Manual Override Labor button.



- In a Proposal you can Add or Change Labor Sub Cats for an individual Proposal by clicking on the Lab Sub Cats button on the Labor Detail screen of a Product.

- A Labor Sub Category Report can be printed for a Proposal from the Proposal/Print Menu/Shop screen.



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Labor Sub Categories by Product

Home Entertainment System
for LeRoy Asher
1306.1-1.100

Linn : Akito

Total Product Qty		Prewire	Trim	Final		Total
2	Totals	3:00:00	5:00:00	7:00:00	=	15:00:00
1 - Installation						
Calibration: Audio/Field		3:00:00				3:00:00
2 - Programming						
Bench: Testing/Burn-in			5:00:00			5:00:00
3 - Training						
Device: Configuration				7:00:00		7:00:00

Linn : Classik Music-B

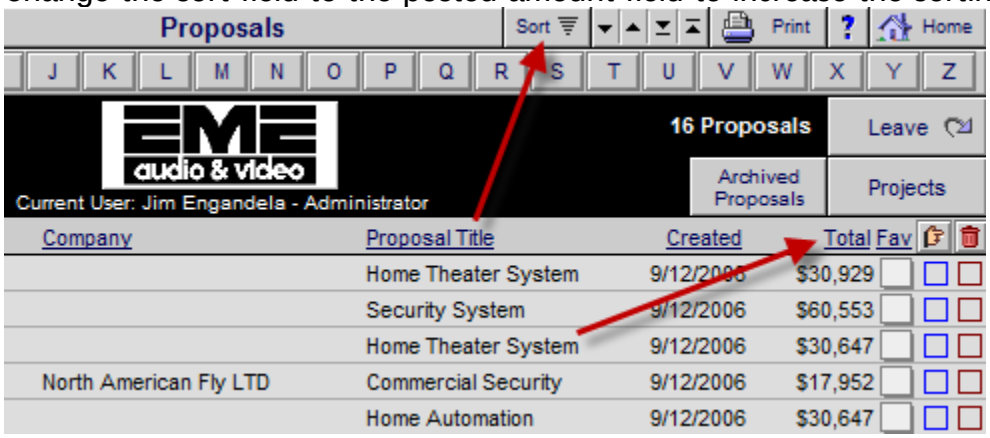
Total Product Qty		Prewire	Trim	Final		Total
1	Totals	4:00:00			=	4:00:00
1 - Installation						
Calibration: Audio/Field		4:00:00				4:00:00

Enhancement – Proposal List: Move Duplicate button to left side.

Moved the Duplicate button to the left side of the screen. Changing all View buttons in the SmartPartner software improves screen comprehension.

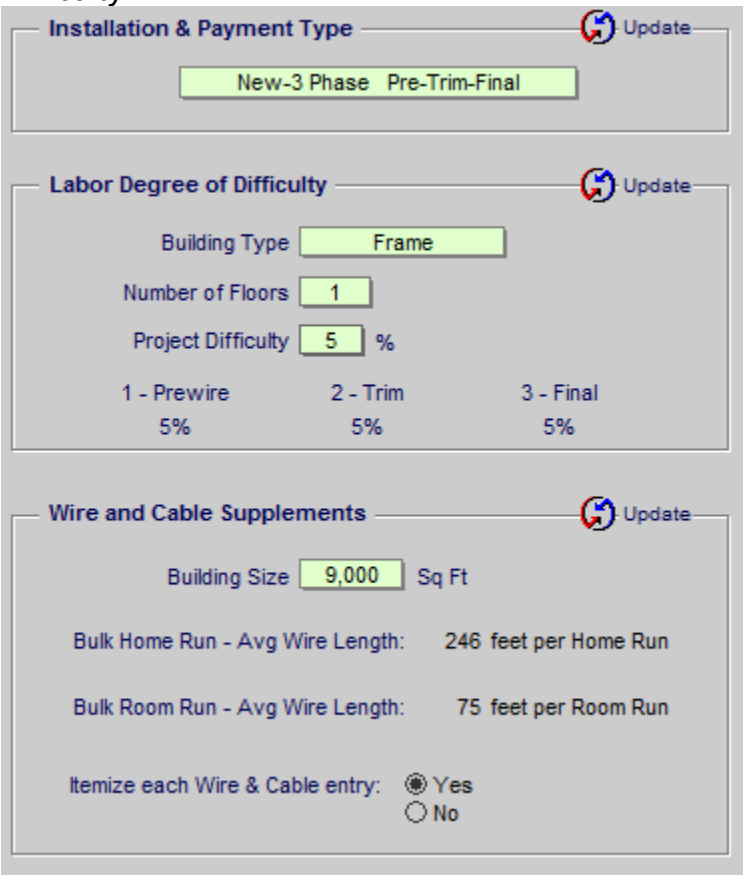
Enhancement – Proposals Sort

Change the sort field to the posted amount field to increase the sorting speed.



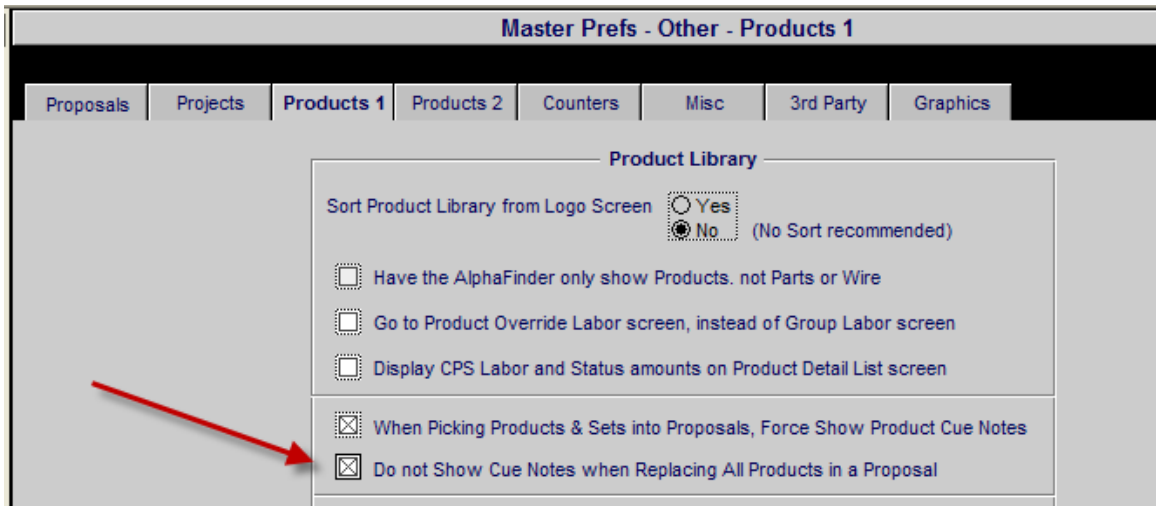
Enhancement – Proposal/Project screen: DOD & Wire layout

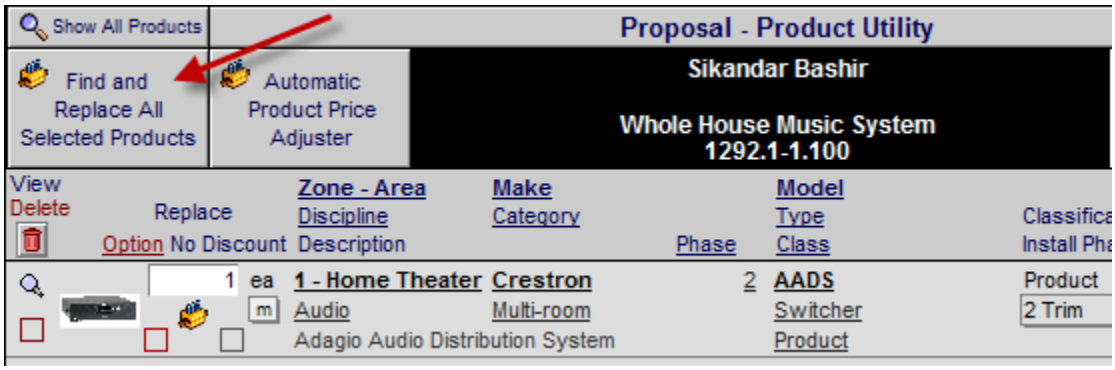
Move the Building Size into the Wire Supplements section and consolidate the Building Type, Number of Floors and Project Difficulty into the Labor Degree of Difficulty.



Enhancement – Proposal/Products/Replace All: Suppress Cue Notes

You can now choose to not show Product Cue notes when using the Proposal/Product Utility "Find and Replace All Select Products" button. To Suppress Cue Notes please check this box in the Master Prefs/Other/Products 1 screen.



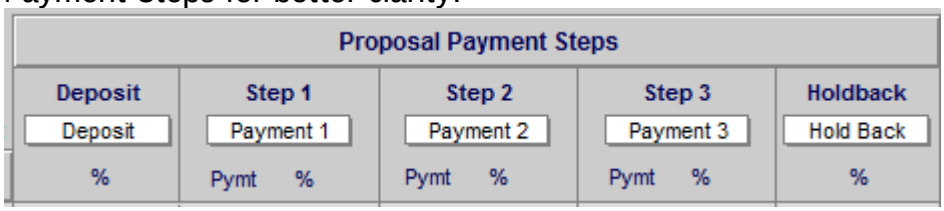


Enhancement – Proposal/Product List: Replace Product

When using the Replace Product feature you will now go to the Product Library and be in the List of Products with the same Make as the one you are Replacing.

Enhancement – Proposal/Payments: Payment Steps

Change the terminology used for Payment Steps from Payment Phases to Payment Steps for better clarity.

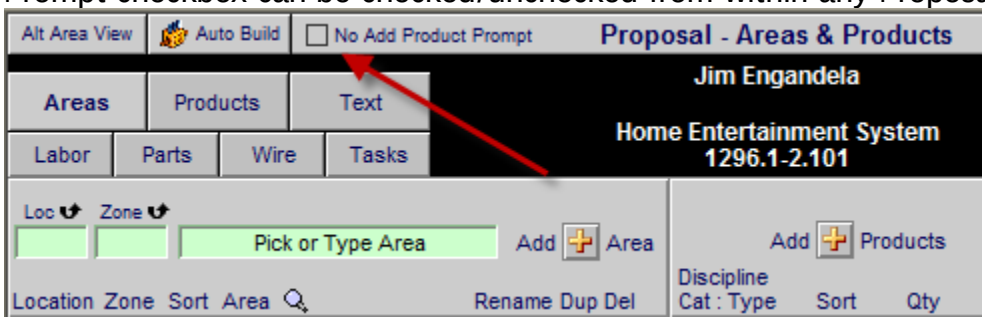


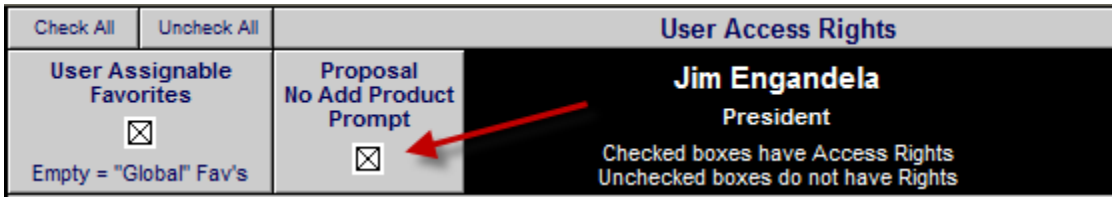
Enhancement – Proposal: User Defined - No Add Product Prompt

When you Add an Area to a Proposal you are automatically prompted to Add Products/Sets/Supplements, unless this box is checked.

You can now set each Users Preference for this in the Master Preferences/User/Access Right screen, so each User can have his own Preference for this feature.

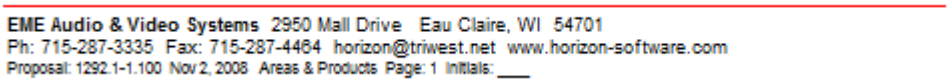
When a User Logs into SCPS his Preference will be set for all Proposals and the Prompt checkbox can be checked/unchecked from within any Proposal as well.





Enhancement – Proposal/Print Menu: Regular & Custom Footers

All Regular and User Custom Layouts (version 7.1) and footers now have the name of the report and the Initial line added to them. The date has also been formatted to Dec. 3, 2008.

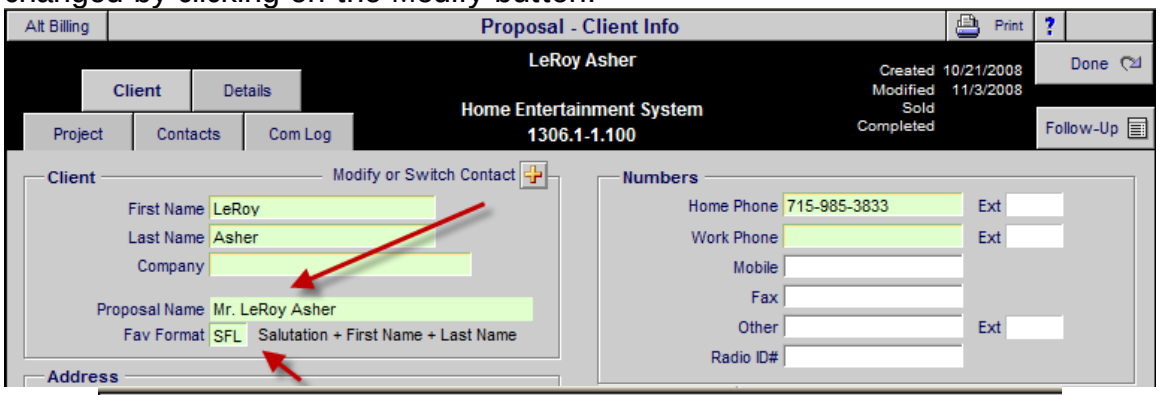


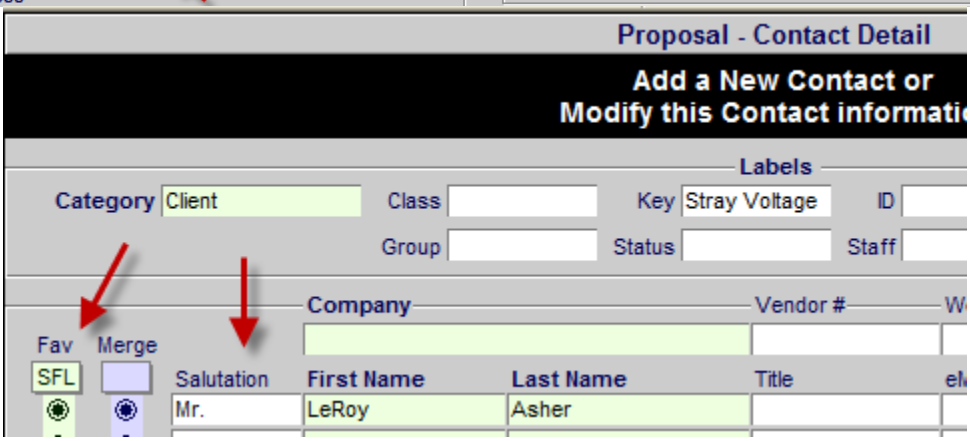
Enhancement – Proposal Printed Sections: Footer

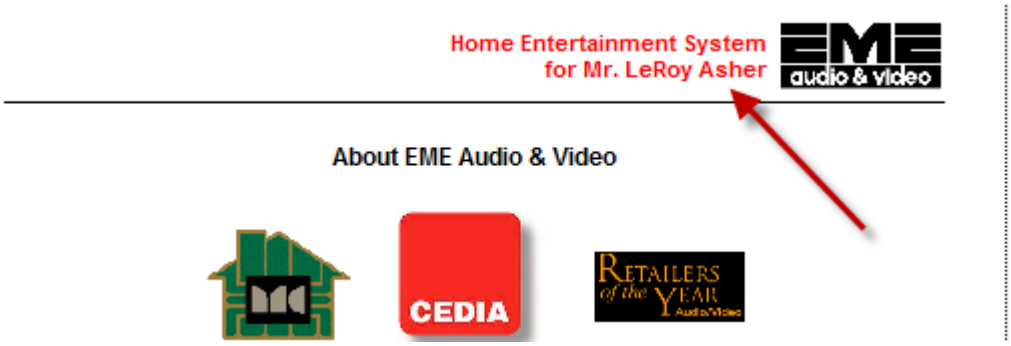
The Footer on all Proposal sections now displays the date formatted as Month, Day and Year and includes the section name instead of section number so that you can print and pdf all sections in any order you choose. Page numbers mark pages within each section. This footer is now consistent on all Main and User Reports (7.1) Proposal sections.

Enhancement – Proposal/Client: Add Proposal Name and Fav Format

The way the clients name will be printed on all Proposal reports, now shows on the Client screen. The Contact Fav Format setting is also shown. This can be changed by clicking on the Modify button.

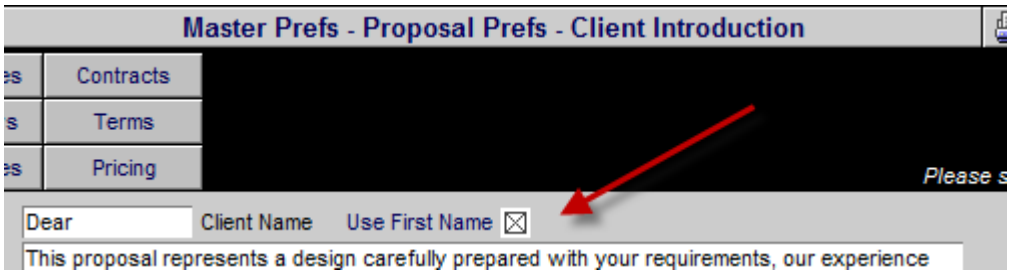


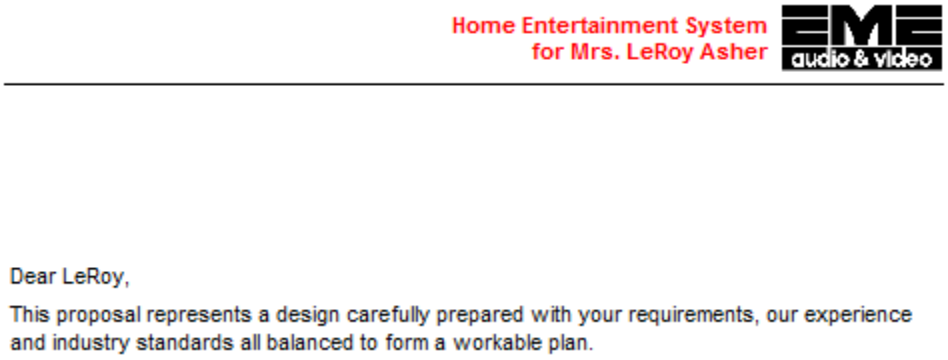




Enhancement – Proposal/Print Menu/Client Intro: Use First Name

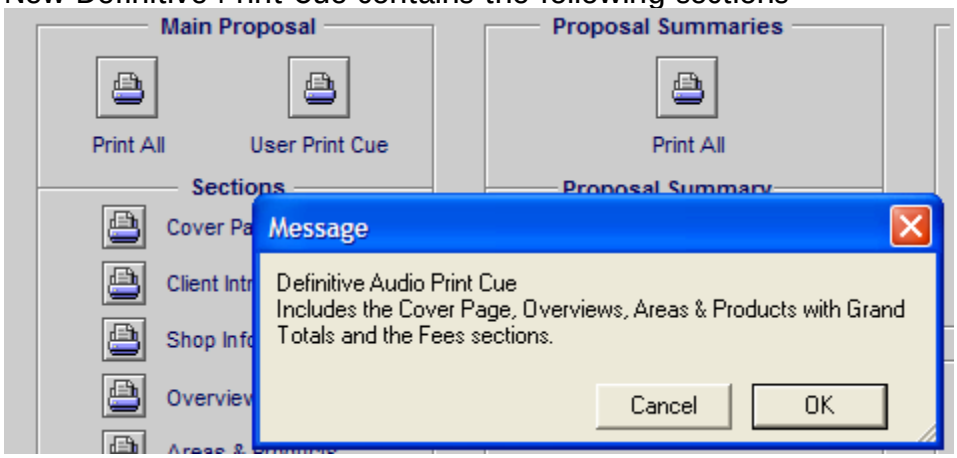
You can now choose to show the clients first name on the Proposal Client Intro page. The option for this is on the Master Prefs/Proposal/Client Intro screen and on the Proposal/Print Menu/Preferences/Client Intro screen for existing Proposals.





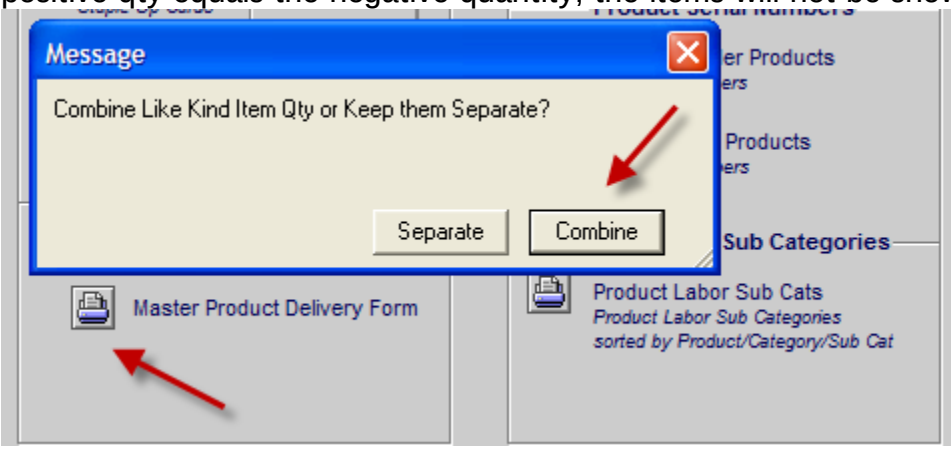
Enhancement – Proposal/Print Menu: Definitive Print Cue

New Definitive Print Cue contains the following sections



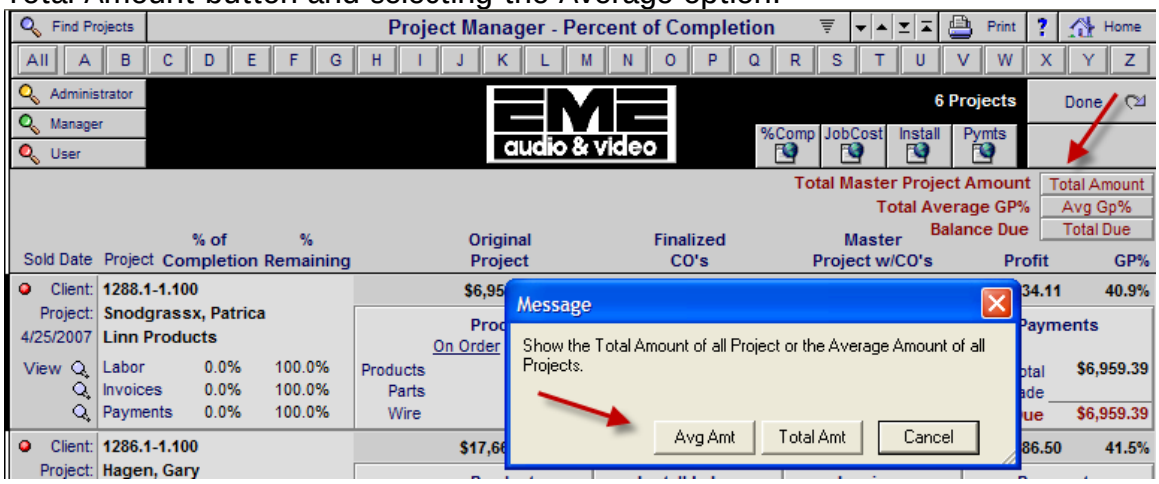
Enhancement – Project/Print Menu/Shop: Combining Qty Option

When printing the Master Product Delivery Form you now have the Option to show the report with items that have positive and negative quantities combined together or all items shown separately. In the Combined mode, when the positive qty equals the negative quantity, the items will not be shown.



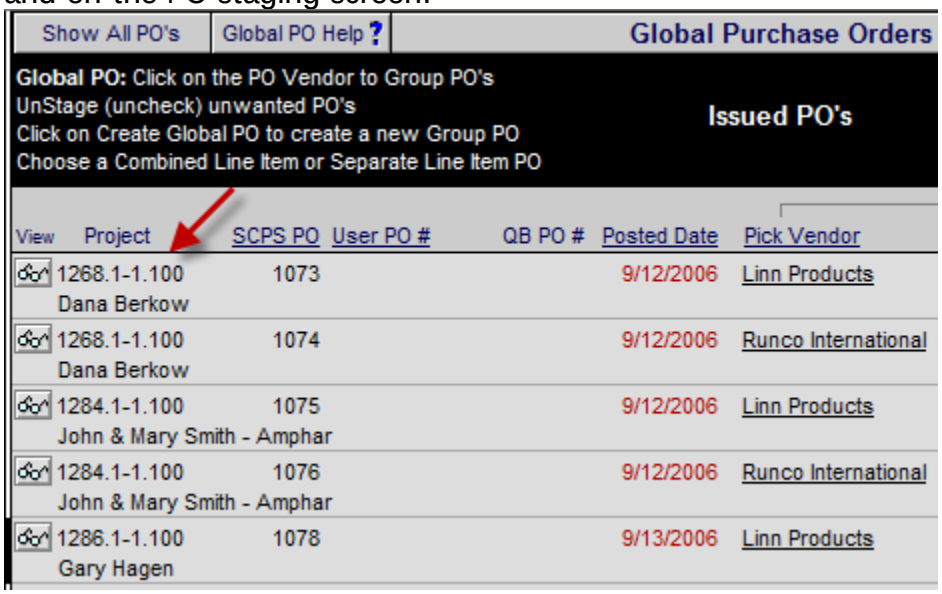
Enhancement – Project Manager/Percent of Completion: Average Amt

You now can get an average amount of all of your Projects by clicking on the Total Amount button and selecting the Average option.



Enhancement – Project Manager/Purchase Orders: Project Info

Add Project Contact Name and Company to the Project Number on this screen and on the PO staging screen.



Enhancement – Reports 7.1

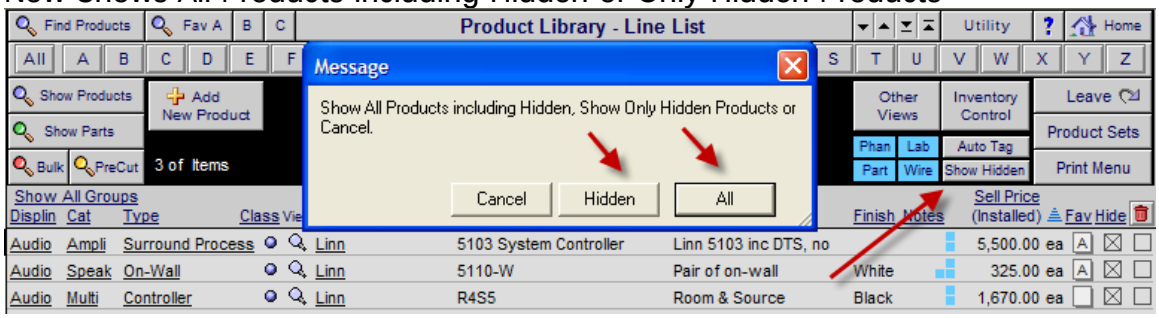
Several enhancements have been made to the Reports file as indicated in these rev doc notes.

Enhancement – Upgrade Utility: Add Upgrade Messages

Optional Upgrade routines that run during the upgrade process now display the routine name so that it is easier to see where the process is at.

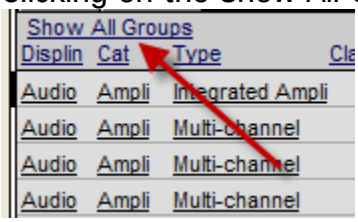
Enhancement – Product Library/Show Hidden: New option

Now Shows All Products including Hidden or Only Hidden Products



Enhancement – Product Library: Show All Groups

Clicking on the Show All Groups

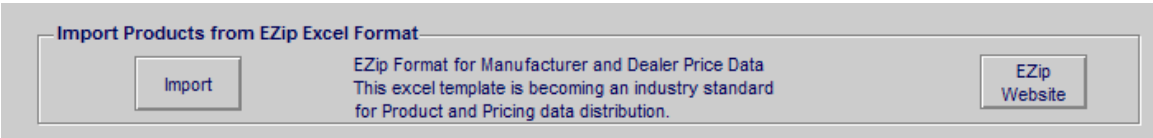


Enhancement – POS/Sales Invoice & Quotation: Increase Comments

Increase the size of the Printed Comments field on POS Sales Invoices and Quotations to 700 pixels to accommodate more text.

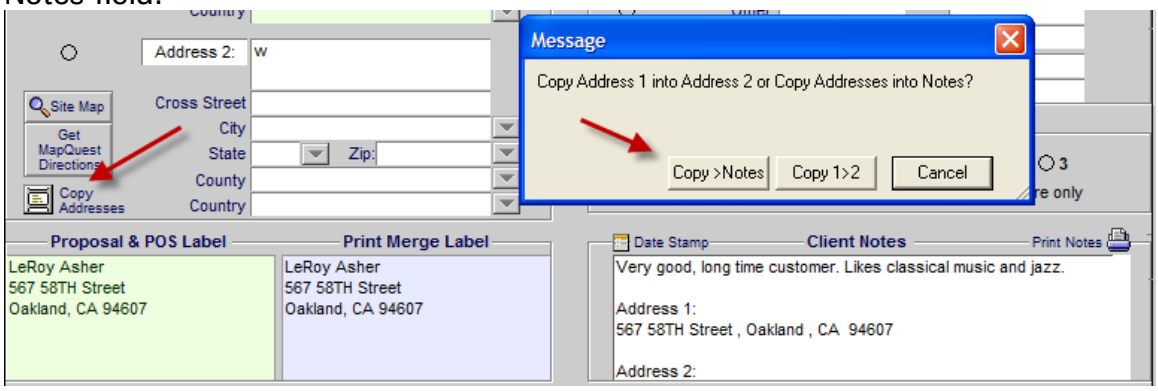
Enhancement – Product Library/Utility/User Data Import: EZip Import

This new Excel format is rapidly becoming an industry standard for Manufacturers. Please check out their website and encourage your vendors to use this new format.



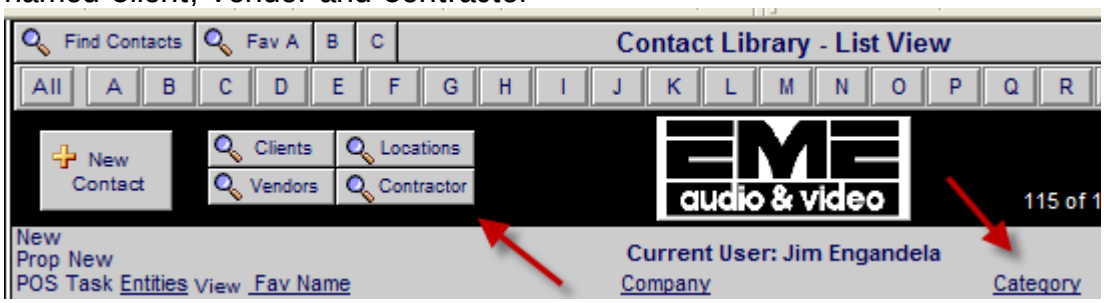
Enhancement – Contacts/Contact Detail: Copy Address Button

Move Copy button and add the ability to Copy both Addresses into the Client Notes field.



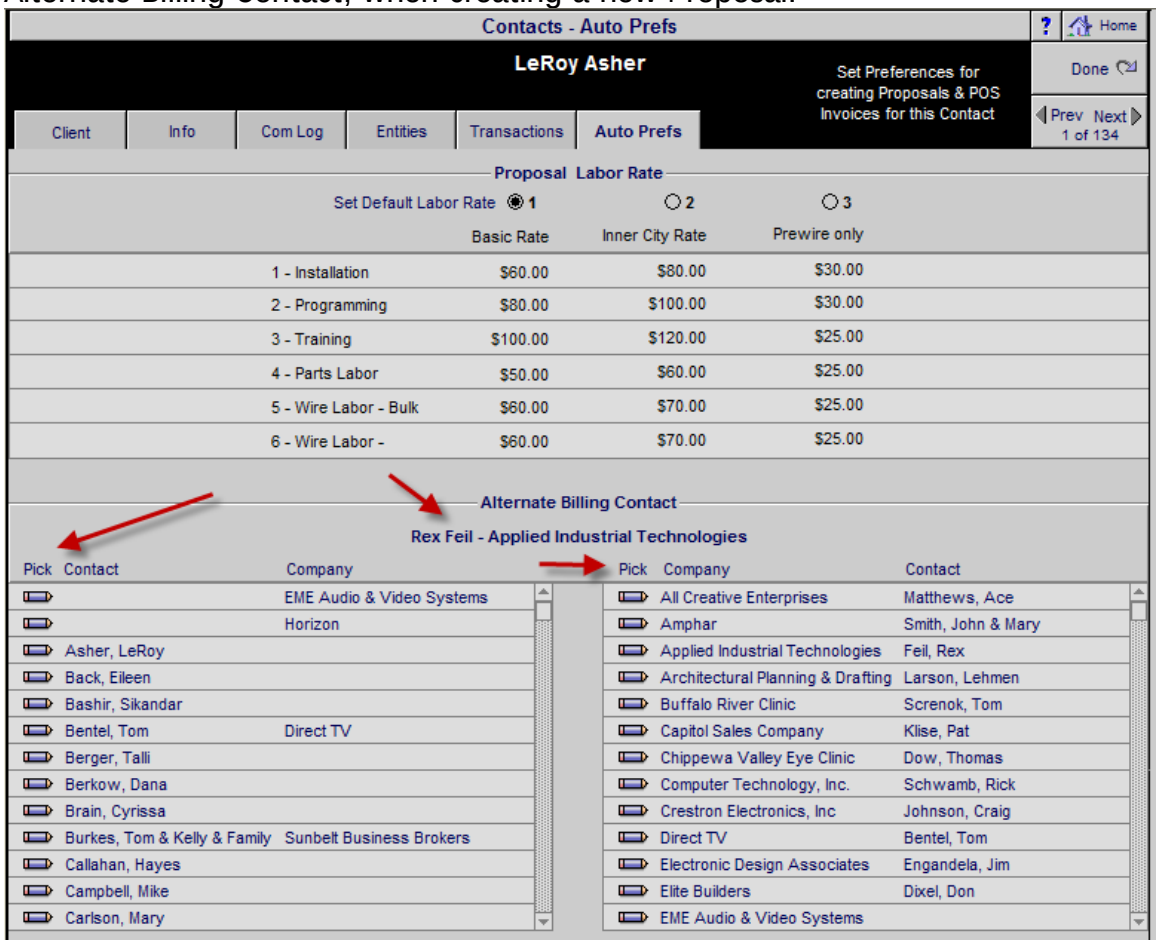
Enhancement – Contacts/Quick Find Clients, Vendors, Locations, Contractors

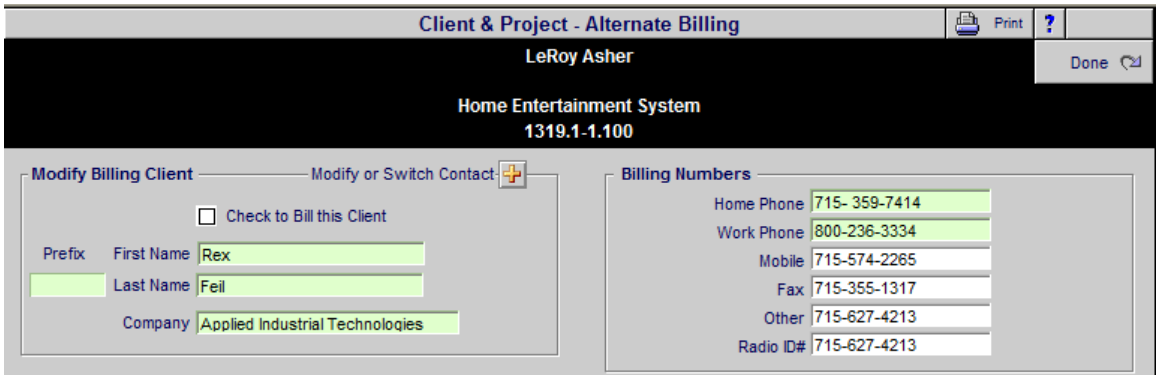
These buttons will quickly find Contacts that have been assigned Categories named Client, Vendor and Contractor



Enhancement – Contact/Auto Prefs: Alternate Billing Contact

Assigning an Alternate Billing Contact for a Contact, will Automatically use this Alternate Billing Contact, when creating a new Proposal.



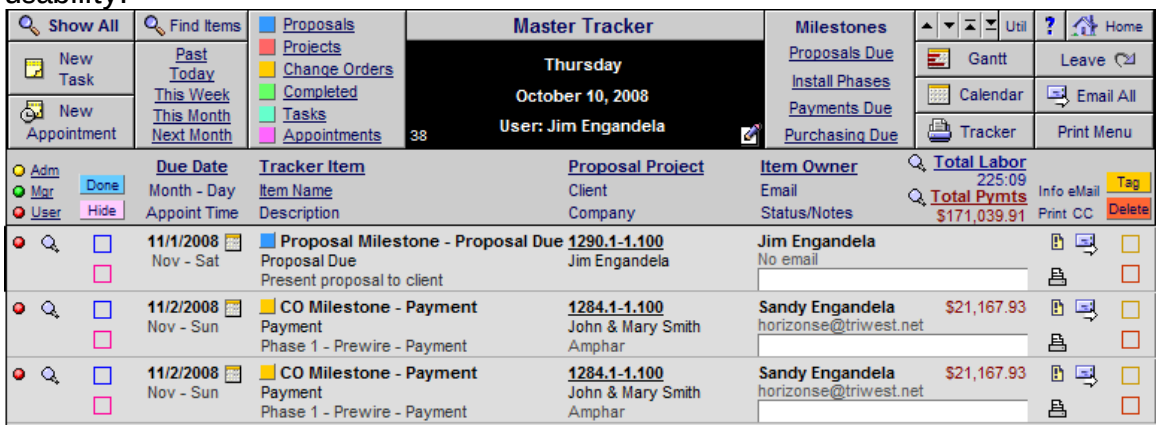


Enhancement – Master Tracker: Speed up entering Tracker

Index "find fields" for faster entrance into the Master Tracker.

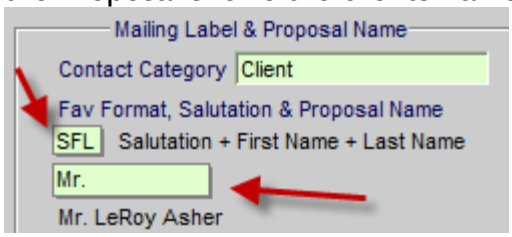
Enhancement – Master Tracker: Redesign User interface

Redesign the Master Tracker User Interface for improved comprehension and usability.



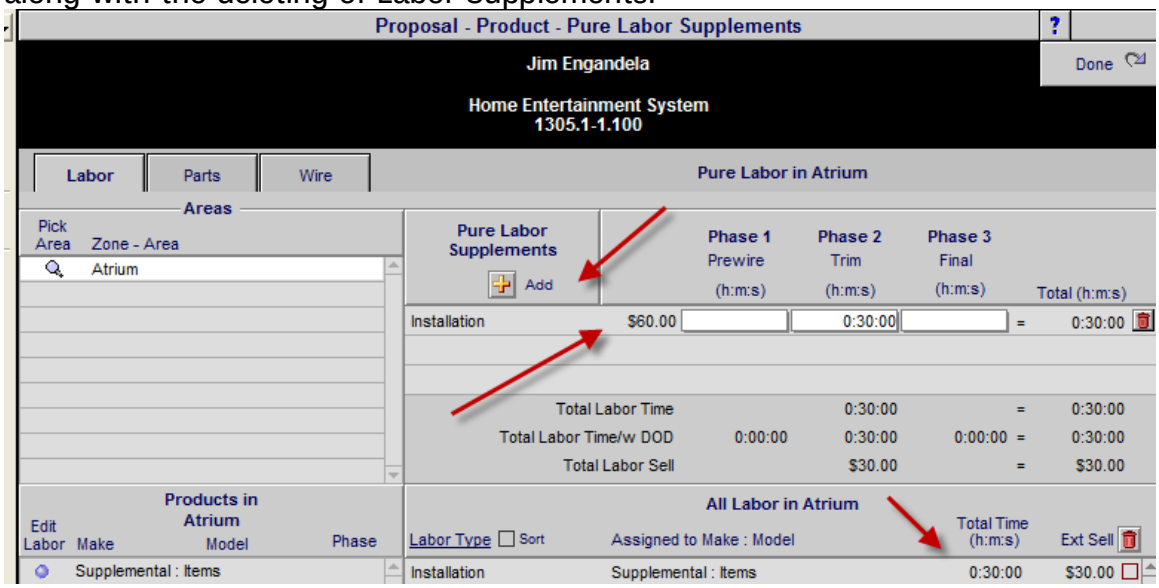
Enhancement – RCMS Users/Proposal/Contact: User Fav Format 7 Salutation

RCMS users can now change the Fav format and the Salutation to change how the Proposal shows the clients name.



Fix – Proposal/Areas & Products: Adding Pure Labor Supplements

Adding a Pure Labor Supplement to a new Proposal was not working properly. Existing Proposals functioned fine but new ones did not. This has been corrected along with the deleting of Labor Supplements.

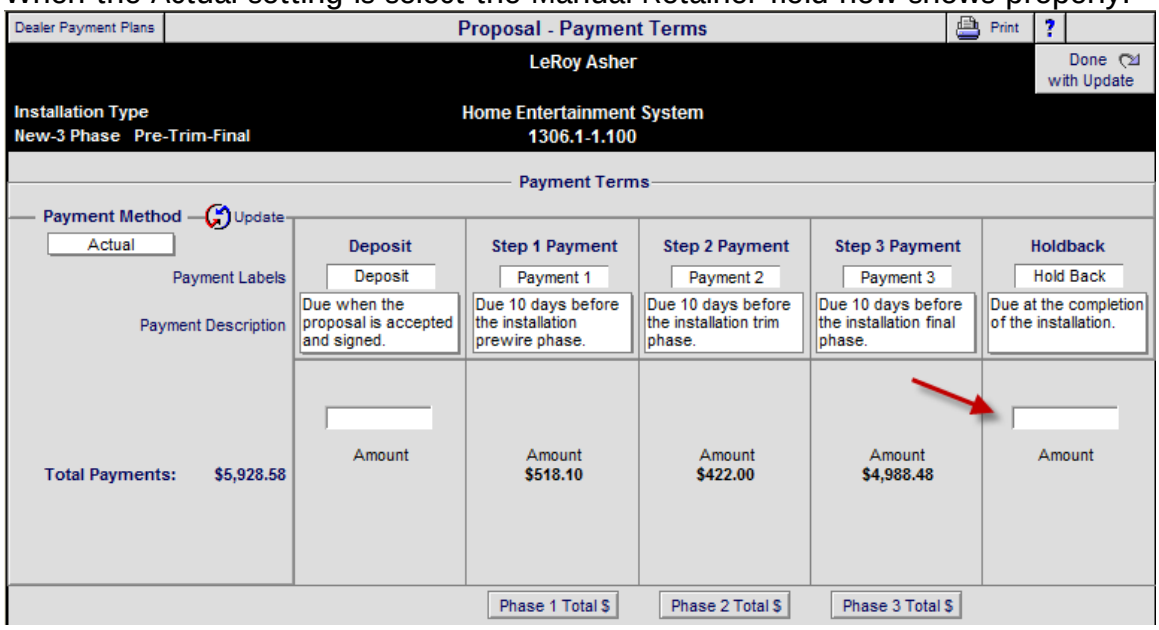


Fix – Proposal / Pricing / Tax: Remove Labor Tax

This feature now clears all labor tax

Fix – Proposal / Payment Screen: Enable Retainer for Actual Payments

When the Actual setting is select the Manual Retainer field now shows properly.



Fix – Proposal / Adding Set Area Text

No longer doubles the text entry

Fix – Proposal / Client / Alt Billing: Bill to Client

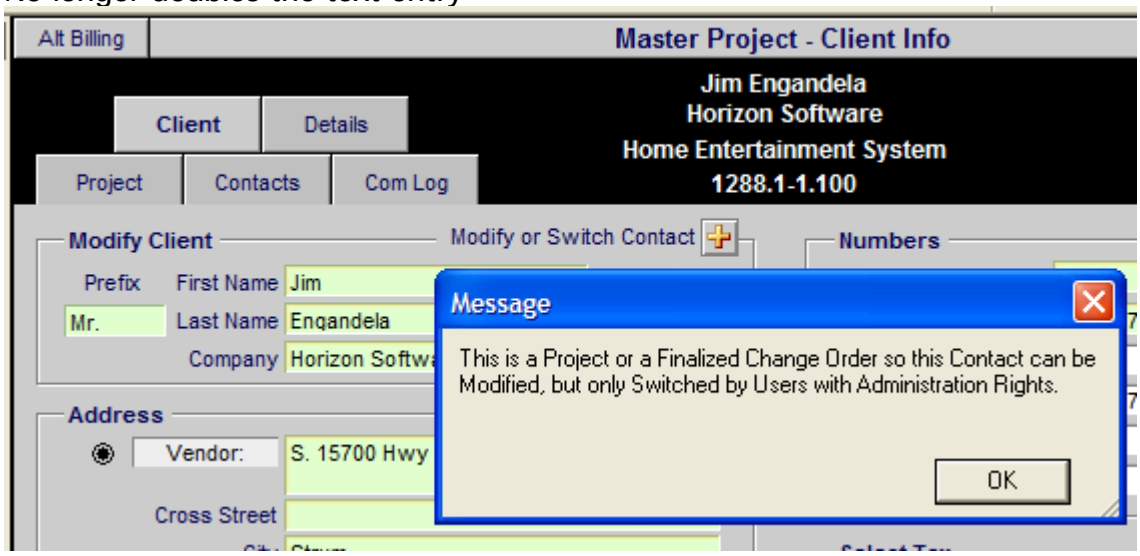
The “Check to Bill this Client” checkbox now works properly and you can click on it if you wish this contact to be the billing contact.

Fix – Proposal / Adding Products, Sets, Supplements to Areas that have been deleted

No longer allows these to be added if the area is deleted.

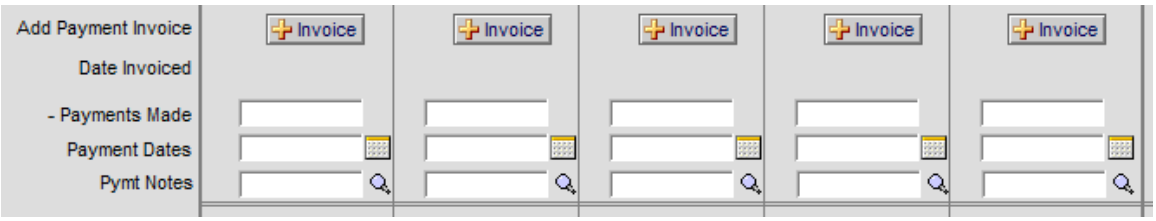
Fix – Proposal / add message when switching in a project

No longer doubles the text entry



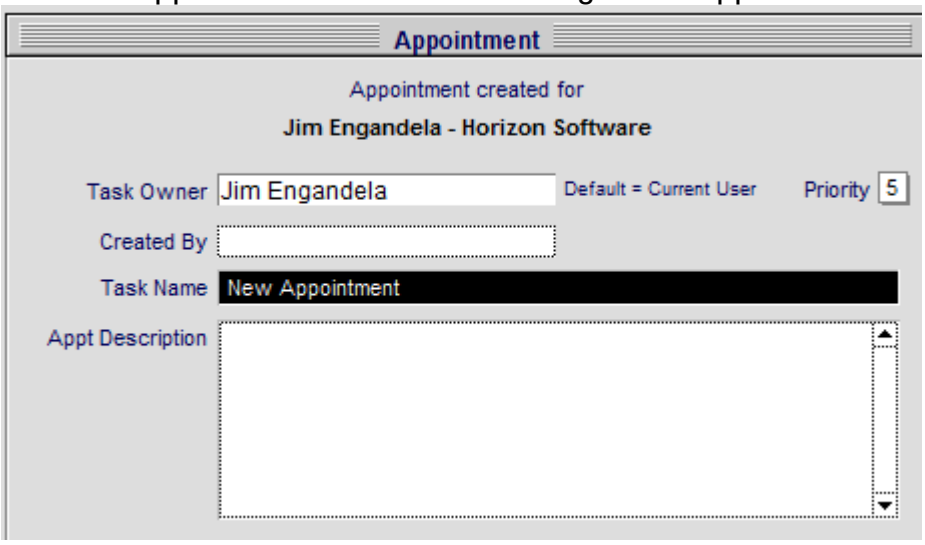
Fix – Change Order / Clear Payment Note fields

Clear all Payment Note fields on new Change Orders when converting to Final CO.



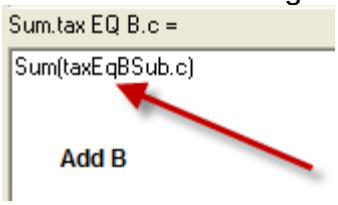
Fix – Master Tracker/Appointment Tasks: Clear Appointment Descript

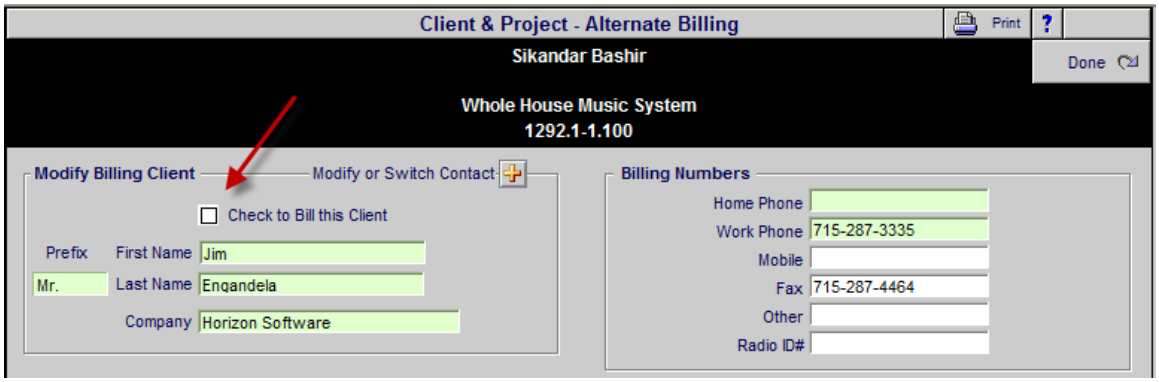
Clear the appointment field when creating a new appointment



Fix – POS/Quotes & Invoice Tax: Fix double Tax

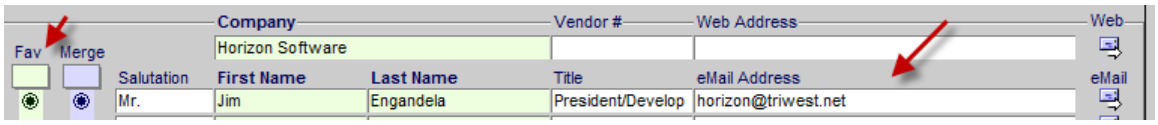
POS Invoices no longer double the tax amount.

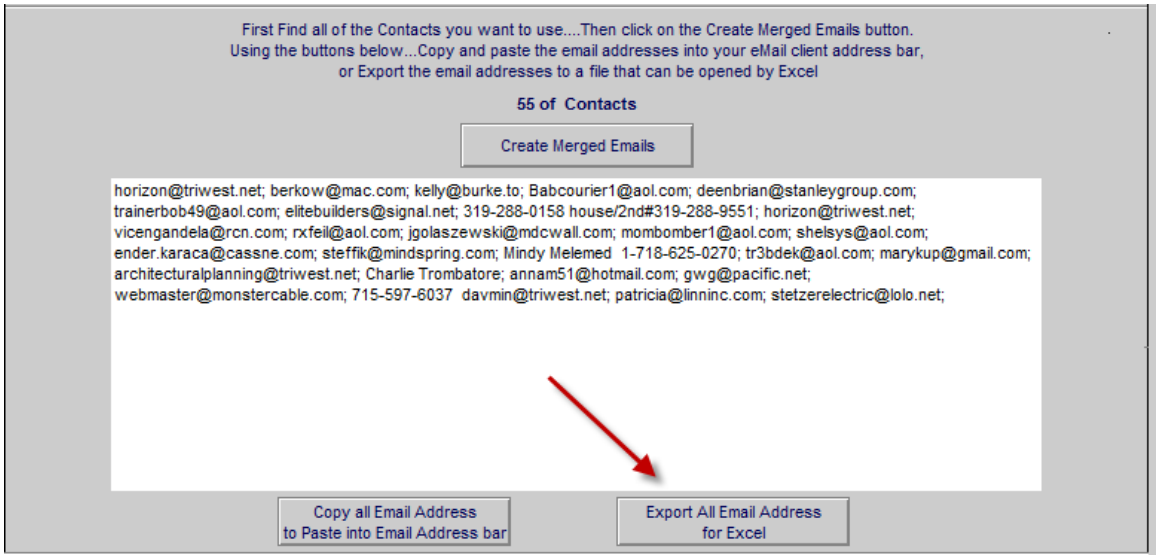




Fix – Contact/Utility/Export Contacts: Export to Excel

This routine now finds only the Contacts that have an email address for Fav Contact settings. It then will create a File named “Contact_Prime_Emails.dbf” that will be stored in your SCPS folder and this file can be opened with Excel. The export data also now inlucde the contact name along with the email address.





Fix – Product Library/Utility: Import Utility Clear Updater

Clear all records from Prod Updater file so that records don’t get imported if the routine is cancelled.

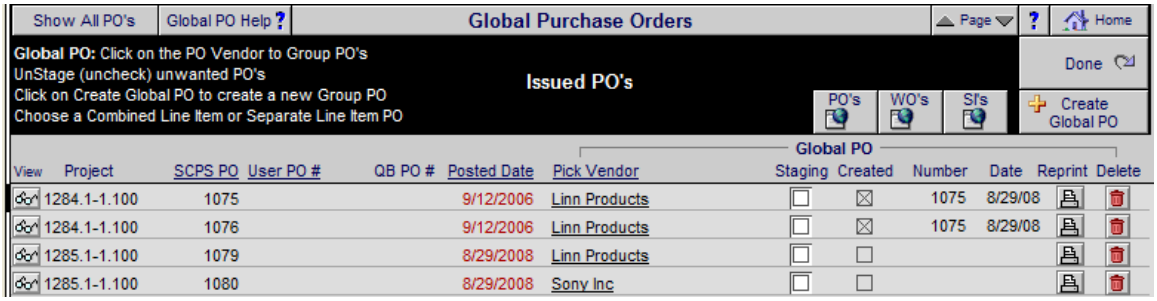
SCPS Version 7.0
Released: 9/15/2008

Enhancement – Project Manager/Purchase Orders: Global PO’s

You can now create Global PO’s that will combine selected individual PO’s into one Global PO. Clicking on a Vendor name will automatically select all of the ungrouped PO’s for that vendor. You can unStage any of selected PO’s that you don’t want to Group by deselecting the checkbox. Then click on the Create Global PO button to create the Global PO.

You will have the option to Print a Global PO with like kind items combined into single line items with the total Qty or Print each item on the PO separately displayed.

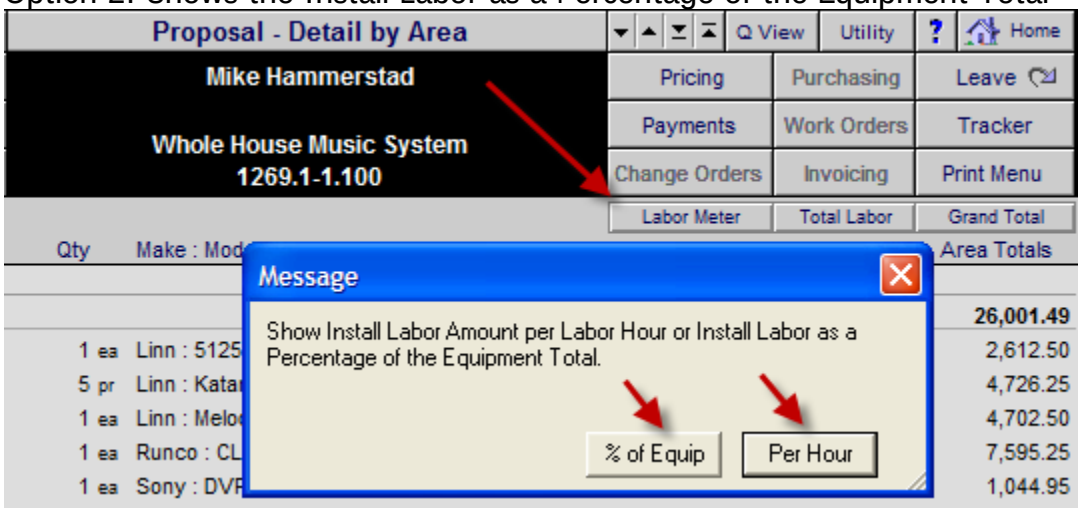
Global PO's show the original PO numbers that they are made of. You can also Reprint a Global PO or Delete it. You receive items from the Global PO on the Original PO's. There are also onscreen help instructions on using the Global PO feature.

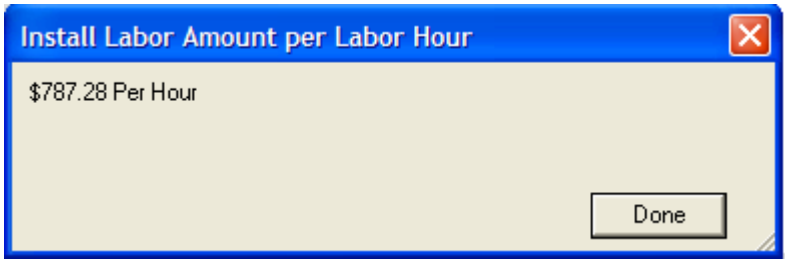


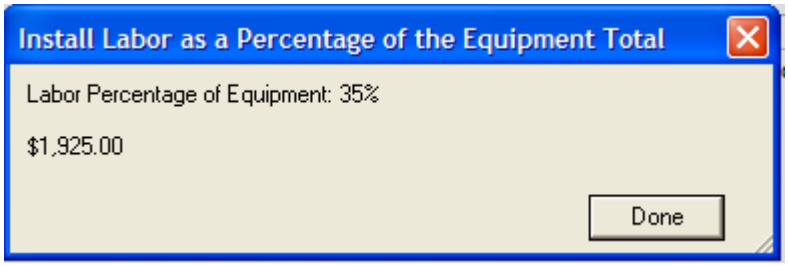
Enhancement – Proposal/Labor Meter

Clicking on the Labor Meter button in a Proposal now gives you two options to provide you with a quick analysis of the amount of labor in your Proposal.

Option 1: Shows the Install Labor Amount per Labor Hour
Option 2: Shows the Install Labor as a Percentage of the Equipment Total



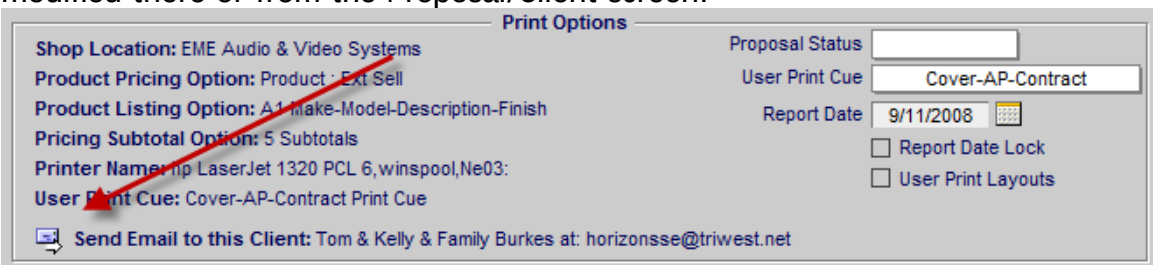




You can set the Labor Percentage of Equipment Default in the Master Prefs/Other/Proposals screen for all new proposals or in the Proposal/Pricing/Labor Rates screen from within a specific proposal.

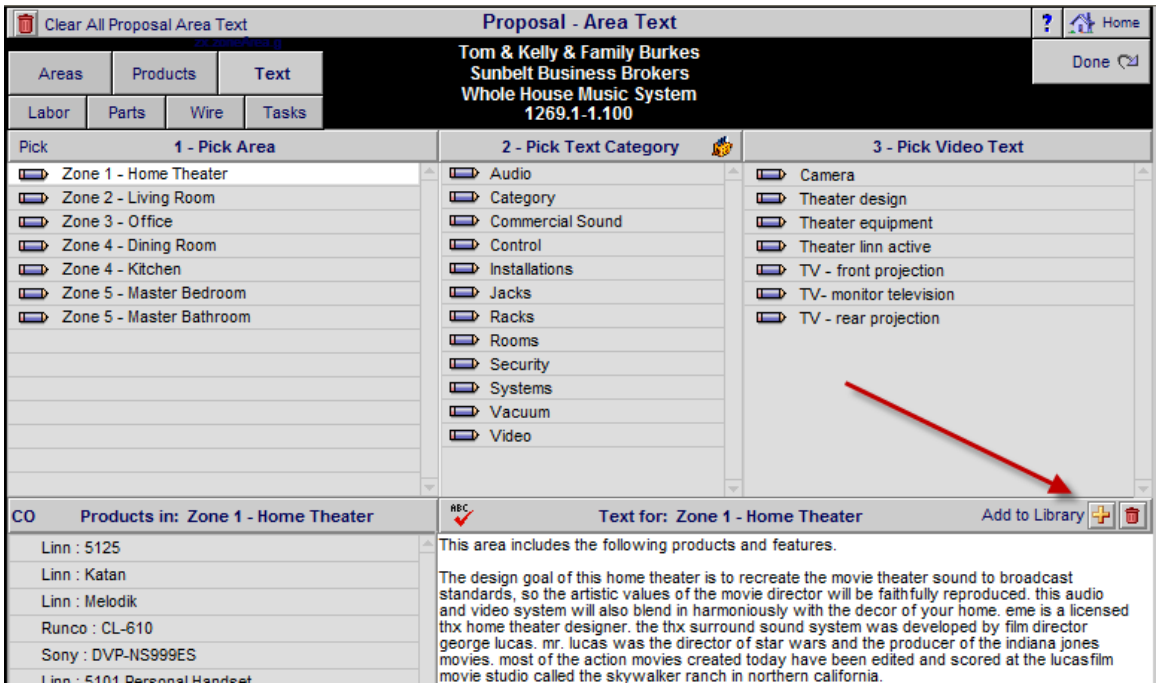
Enhancement – Proposal/Print Menu: Email Client Utility

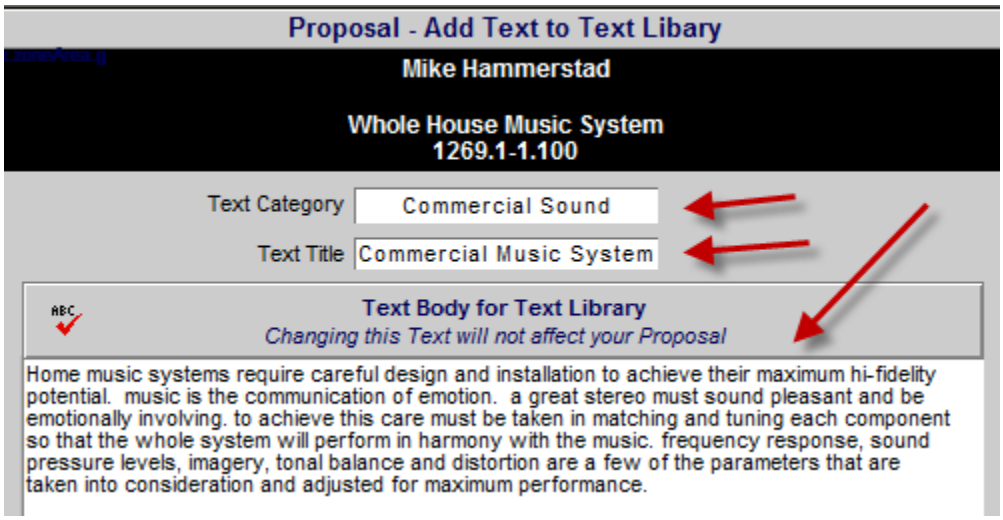
You can now email the Proposal Client directly from the Print Menu. This is handy if you use the PDF creator to bundle a Proposal into a single PDF document and then attach the PDF to the email and send it to your client. This email address is stored in the Contact Module for this client and can be modified there or from the Proposal/Client screen.



Enhancement – Proposal/Area Text: Add Text to Text Library

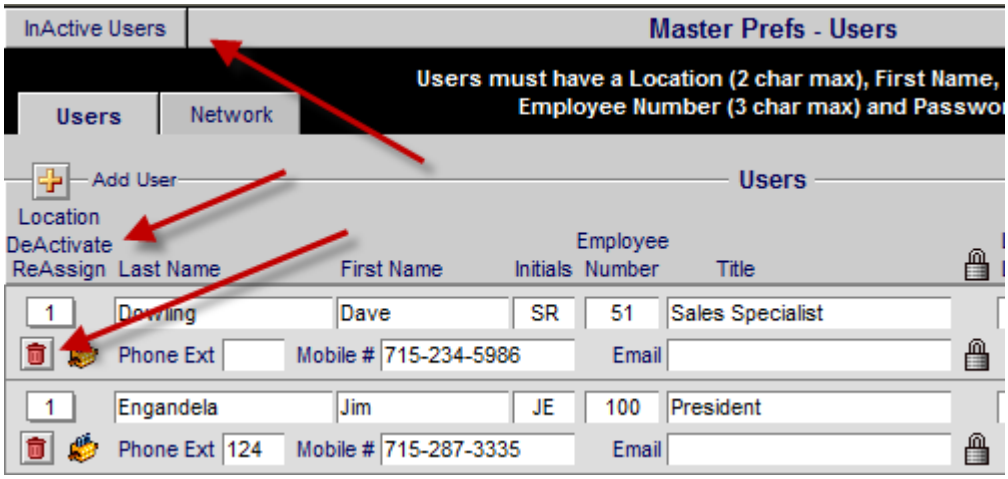
When adding Proposal Text to your Text Library you can now enter a Text Category and Text Title. You can also change or modify the Text Body prior to adding it to the Text Library and these changes will not affect your Proposal.

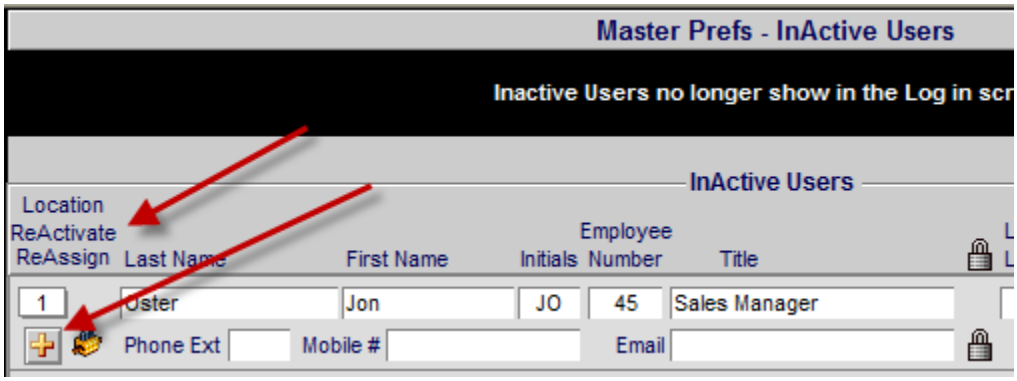




Enhancement – Master Prefs: DeActivate and ReActivate Users

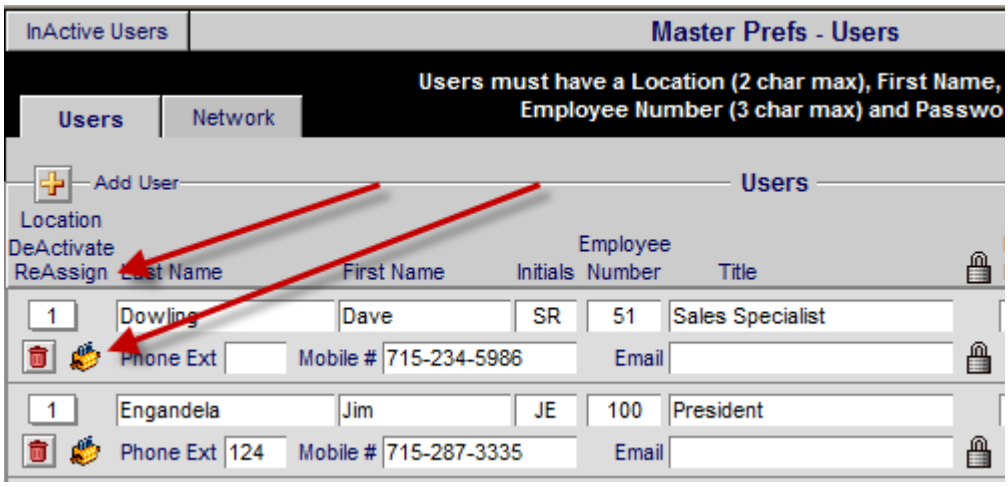
Users that you no longer want in the system can be DeActivated. Their names will no longer show up in the Log In screen. You can ReActivate any of these Users from the InActive Users screen.

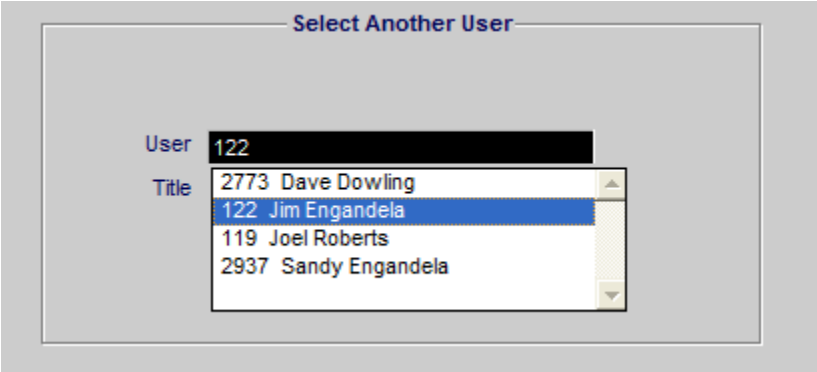




Enhancement – Master Prefs: ReAssign Proposals & Projects

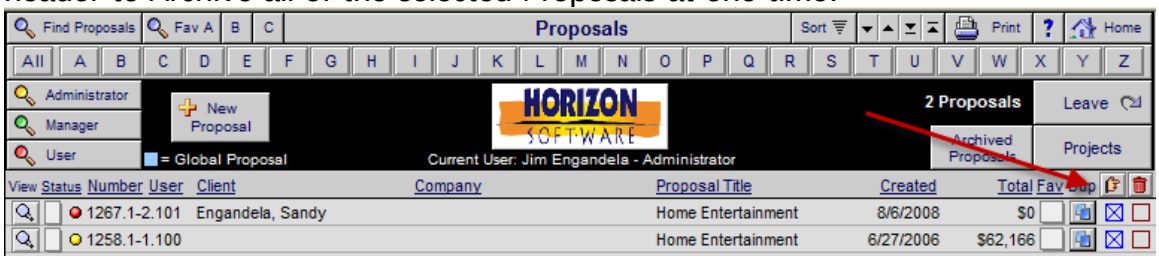
You can now ReAssign all of the Proposals & Projects from one User to another User by clicking on the ReAssign Utility button and selecting another User.





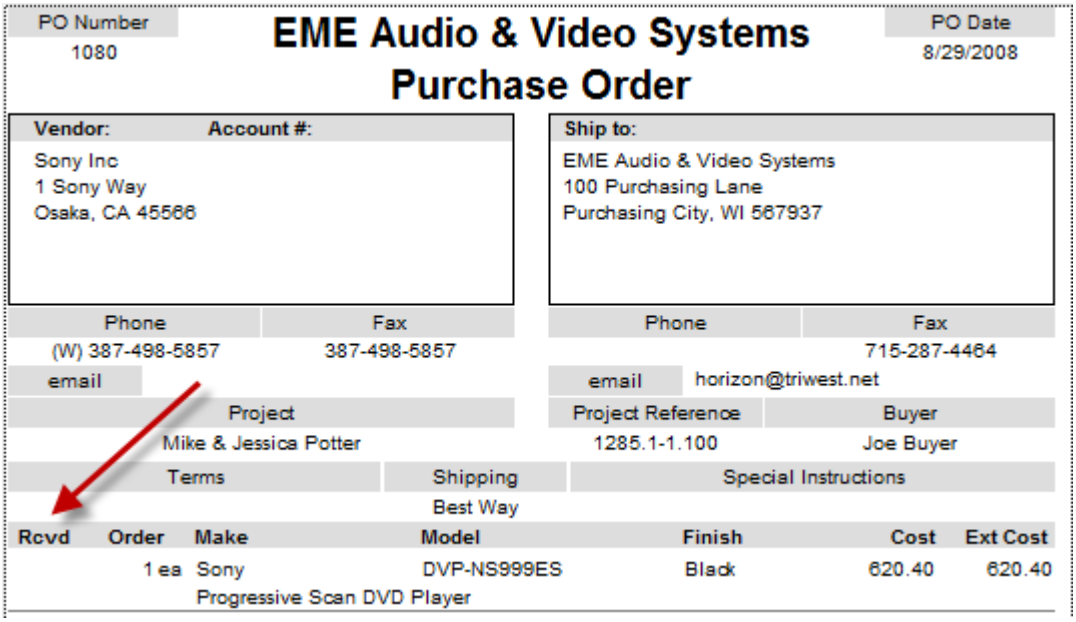
Enhancement – Proposal List: Multiple Archive Utility

You can now check multiple Proposals and then click on the Archive button in the header to Archive all of the selected Proposals at one time.



Enhancement – Project/Purchase Orders: Add Receiving space

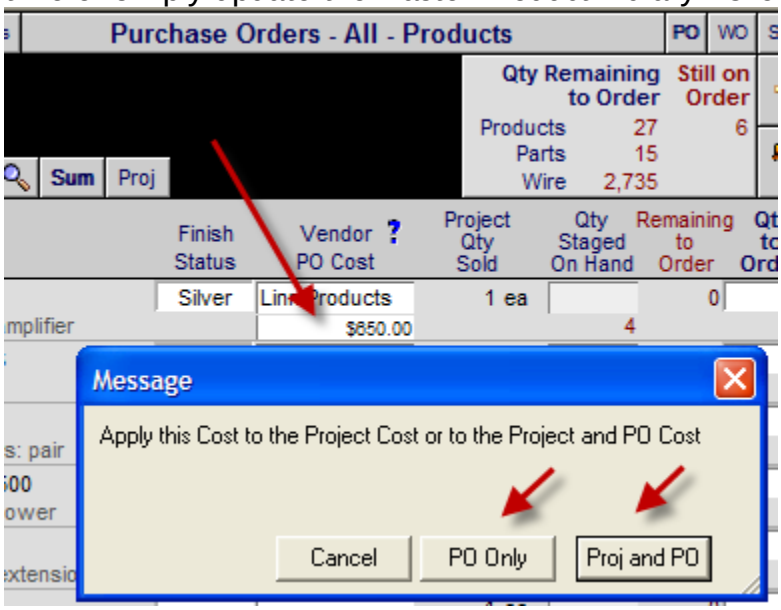
A new Item Receiving line has been added to the PO to record received items.



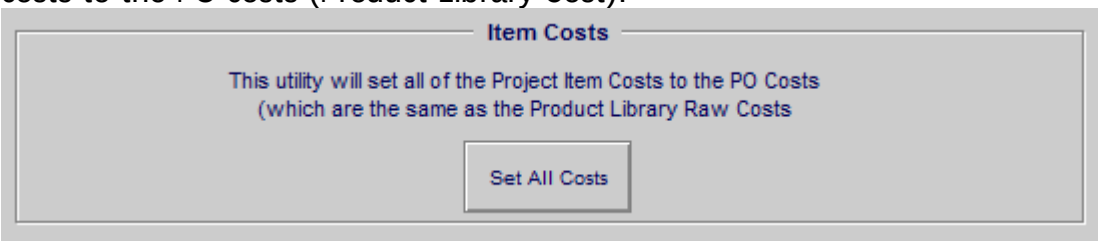
Enhancement – Project/Purchase Order/PO Costs:

You can now change the Product Costs for Products on your Purchase Orders to reflect current Prices. When doing this you will be given the option to update

the Master Product Library PO Cost as well as the Project Item Cost at the same time or simply update the Master Product Library PO Cost.

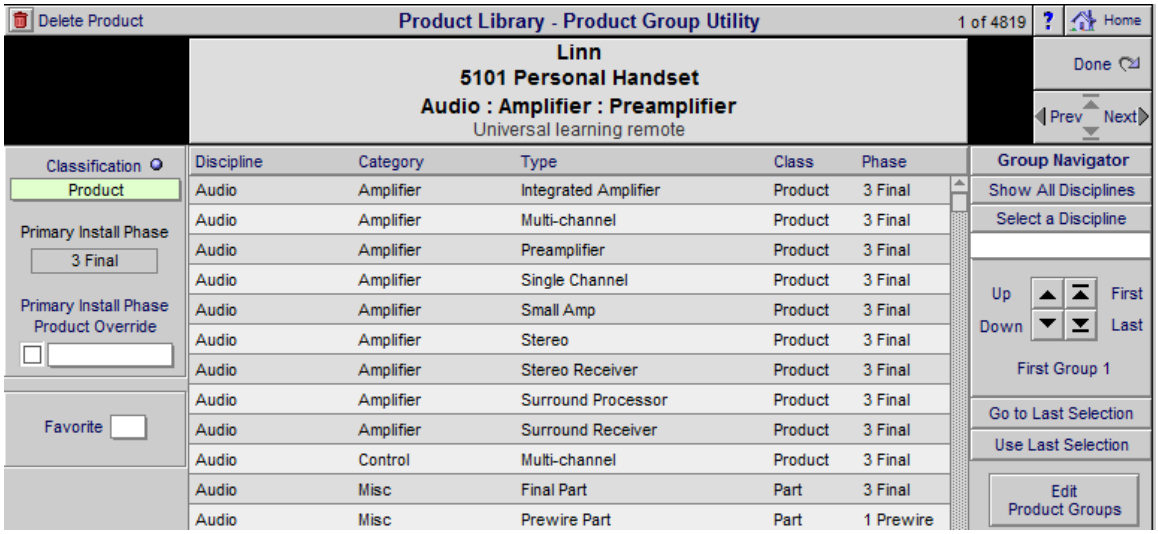


You also can use the Purchase Order Utility to Update ALL of the Project Item costs to the PO costs (Product Library Cost).



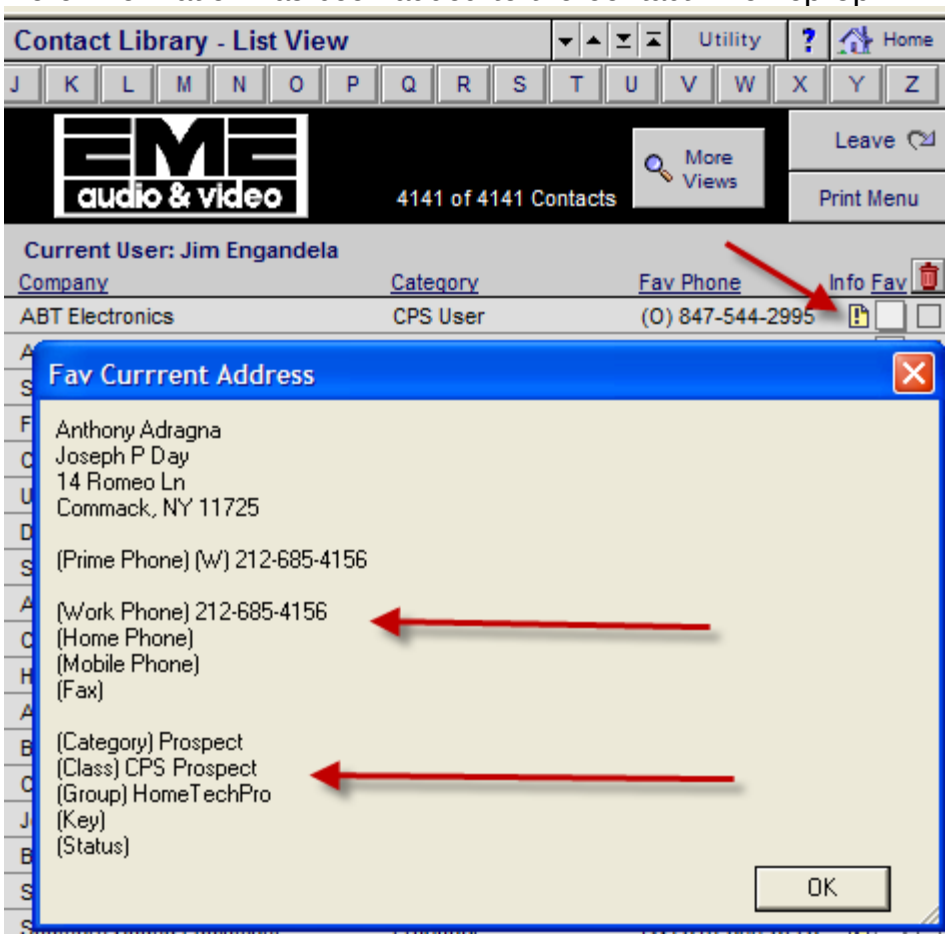
Enhancement – Product Library/Product Detail/Group Assignment

This Group Assignment portal now includes Phase and when you click on a Group to assign it to the product the Phase will be assigned to the product and you will automatically return to the Product Detail screen.



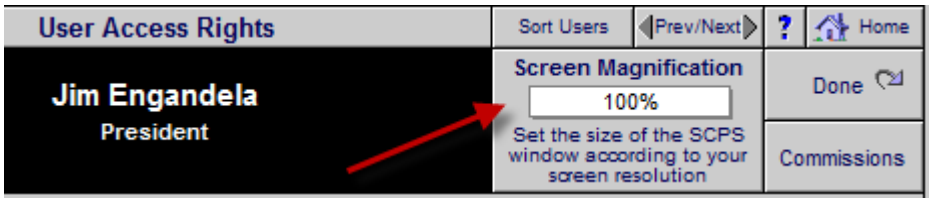
Enhancement – Contact: Info button more info

More information has been added to the Contact Info Pop Up



Enhancement – SmartPartner Screen Size: For Each User

Each user can now set the SmartPartner screen size according to their individual needs and monitor resolution. Set this in the Preferences/Users/Access Rights screen. If this field is blank the default is 100%.

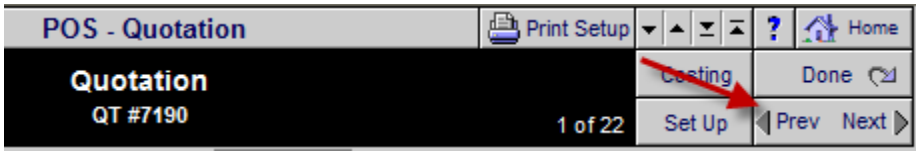


Enhancement – POS/PO: AlphaFinder picks up Client Name

The AlphaFinder now finds Client Names as well as Company names

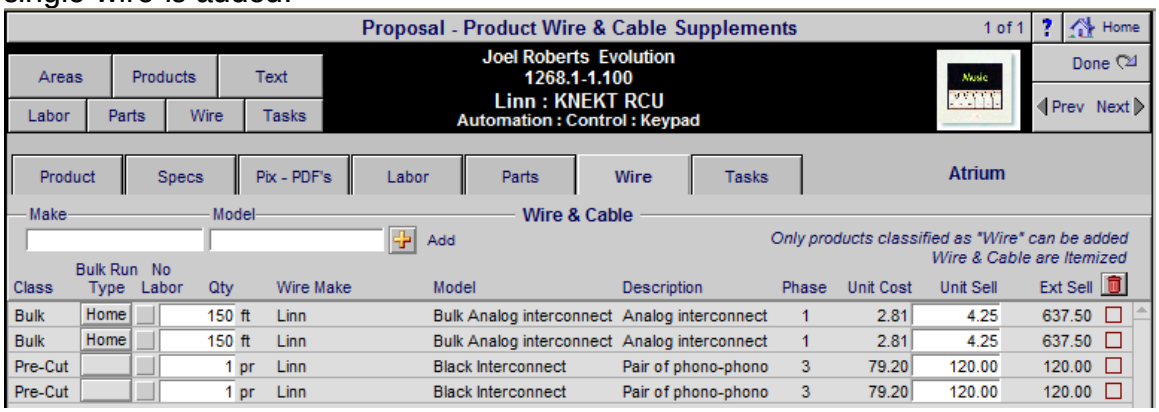
Enhancement – POS/All Invoices: Prev Next button

You can now cycle through Quotations, Sales Invoices, PO's and WO's using the Previous/Next button.



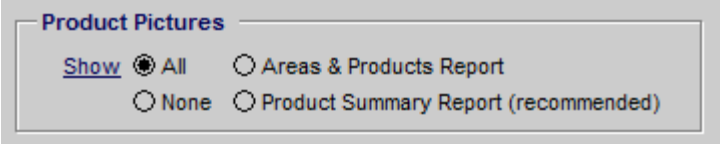
Fix – Proposal/Areas & Products/Product Wire Detail: Add Wire Supplement for Multiple Products

When adding a Wire or Cable to a Product SCPS now looks at the Itemized Wire option and adds multiple wires automatically, based on the Product Qty). If the Itemize option is "yes", then multiple wires are added. If it is set to "No", then a single wire is added.



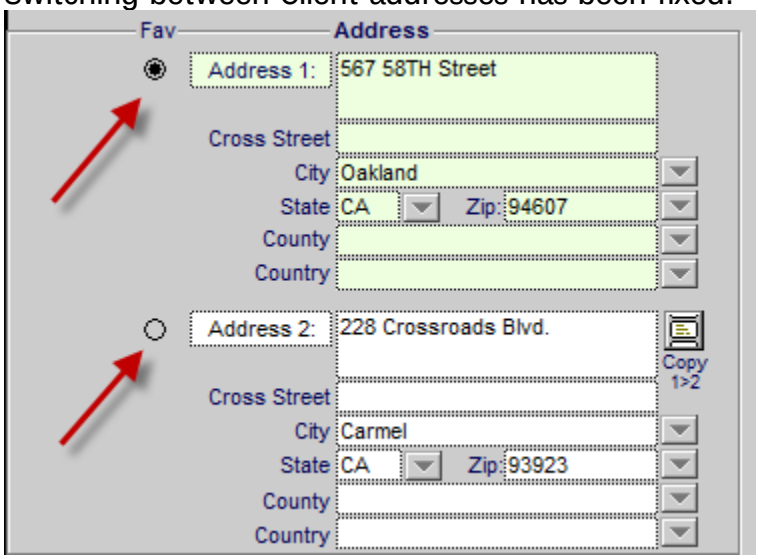
Fix – Proposal/Print Menu/Print Options: Product Pictures

The option to not show Pix on the Product Summary Report by selecting the "None" option now works properly.



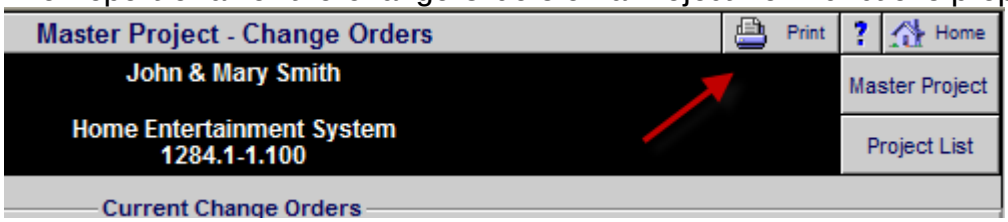
Fix – Proposal/Product/Product Features: Change to Lookup field
The Proposal Product Features field has been changed to a lookup field so you can now change the features text on a specific Proposal Product without changing the Product Library Features text and/or any other like kind product in other Proposals/Projects.

Fix – Proposal/Client
Switching between Client addresses has been fixed.



Fix – Proposal List: Duplicating Proposal: Do not dup rev number
Duplicating a Proposal with a New Full Proposal number no longer also duplicates the Revision number.

Fix – Project CO list Print
The Report of all of the Change Orders on a Project now functions properly.



Fix – Project Manager/PO's, WO's, SI's: Delete with Project Deletion
All PO's, WO's and SI's associated with a Project will now be deleted when the Project is deleted. A warning message, to this effect, has also been added to the

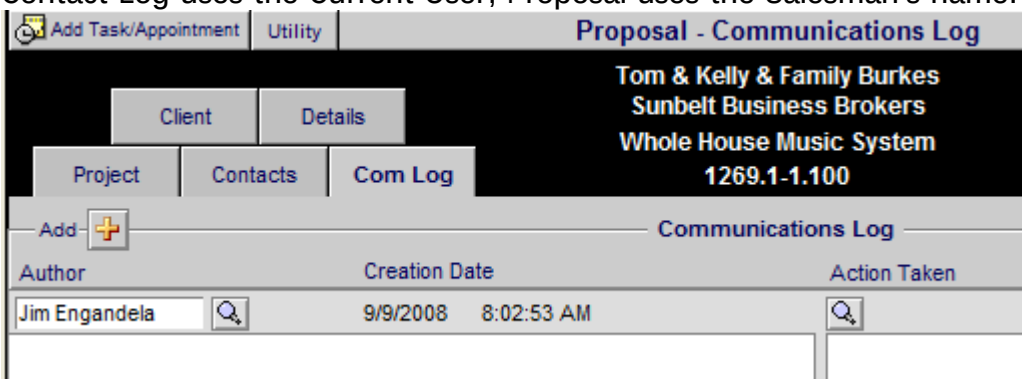
deletion button and the upgrade routine automatically deletes orphaned Invoices.

Fix – Project/Invoice: QuickBooks Estimates match Sell Price
Rounded sell price field and added error checking so that the SCPS Sell Price matches the QuickBooks Estimate sell price.

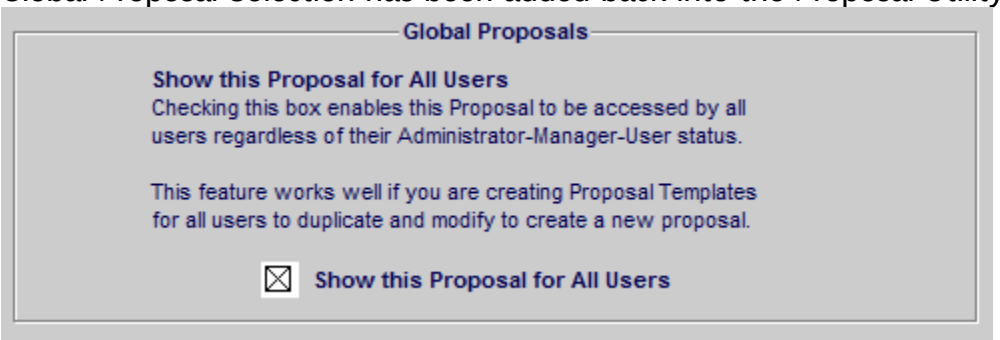
Fix – Product Library: Blue Labor Indicator Display
Only show Blue Labor indicator if Time on a Product, Part or Wire labor is greater than 0 and not if there are labor records present.

Fix – Product Library/Parts & Wire Labor
Enable Parts & Wire Labor Time to be set to "Blank" which picks up the Default Labor time or to 0 which does not add a Part or Wire Labor record to the Proposal.

Fix – Contact & Proposal/Com Log: Author stamps on all records
Adding new communication log records now stamps the Author on all records. Contact Log uses the Current User, Proposal uses the Salesman's name.



Fix – Proposal/Utility/Admin: Global Proposals
Global Proposal Selection has been added back into the Proposal Utility screen.



Fix – Project/Invoice/QuickBooks Estimate
-Added the QB Link Utility to the Client & Terms routine.

-Fixed the Project Fees portal to only show checked Project Fees.

-Changed the Product Library QB SKU label to QB Item label to indicate that this field should match the QB Item values.

-Sorted the QB Invoice portal including the Item Description.

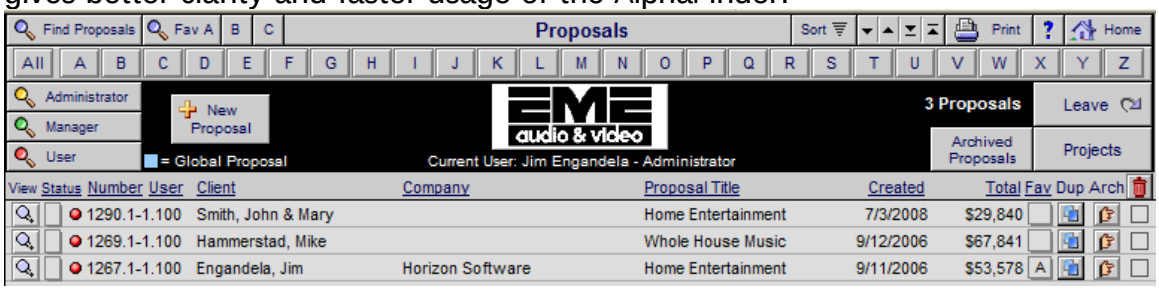
-Fixed the Auto Set feature to include Auto Setting Fees.

SCPS Version 6.9
Released: 7/14/2008

Enhancement – GUI New Screen Colors & AlphaFinder position

All SCPS screen text is now Dark Blue and all data entry text is black. This increases the screen comprehension and adds some nice pizzazz to our 4th order interface. Let us know how you like the new look.

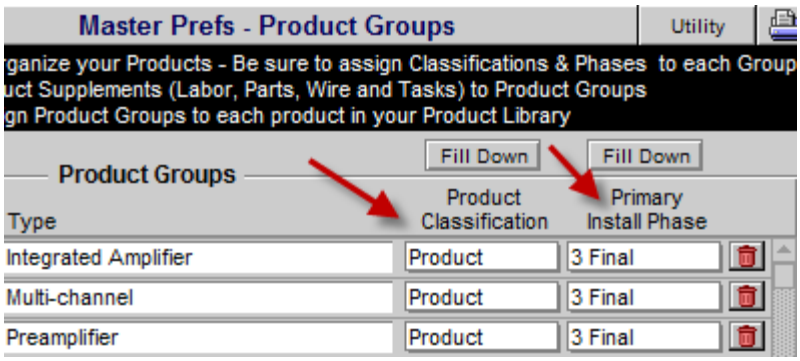
All AlphaFinder bars, on all modules, are now placed below the Header bar. This gives better clarity and faster usage of the AlphaFinder.



Enhancement – Preferences/Groups: Group Assigned Phase & Class

During the upgrade SCPS will Auto Set Phase & Class in your Product/Groups that do not have a Phase or Class assigned to them.

When adding new Product Groups a default Phase and Class is now auto entered.

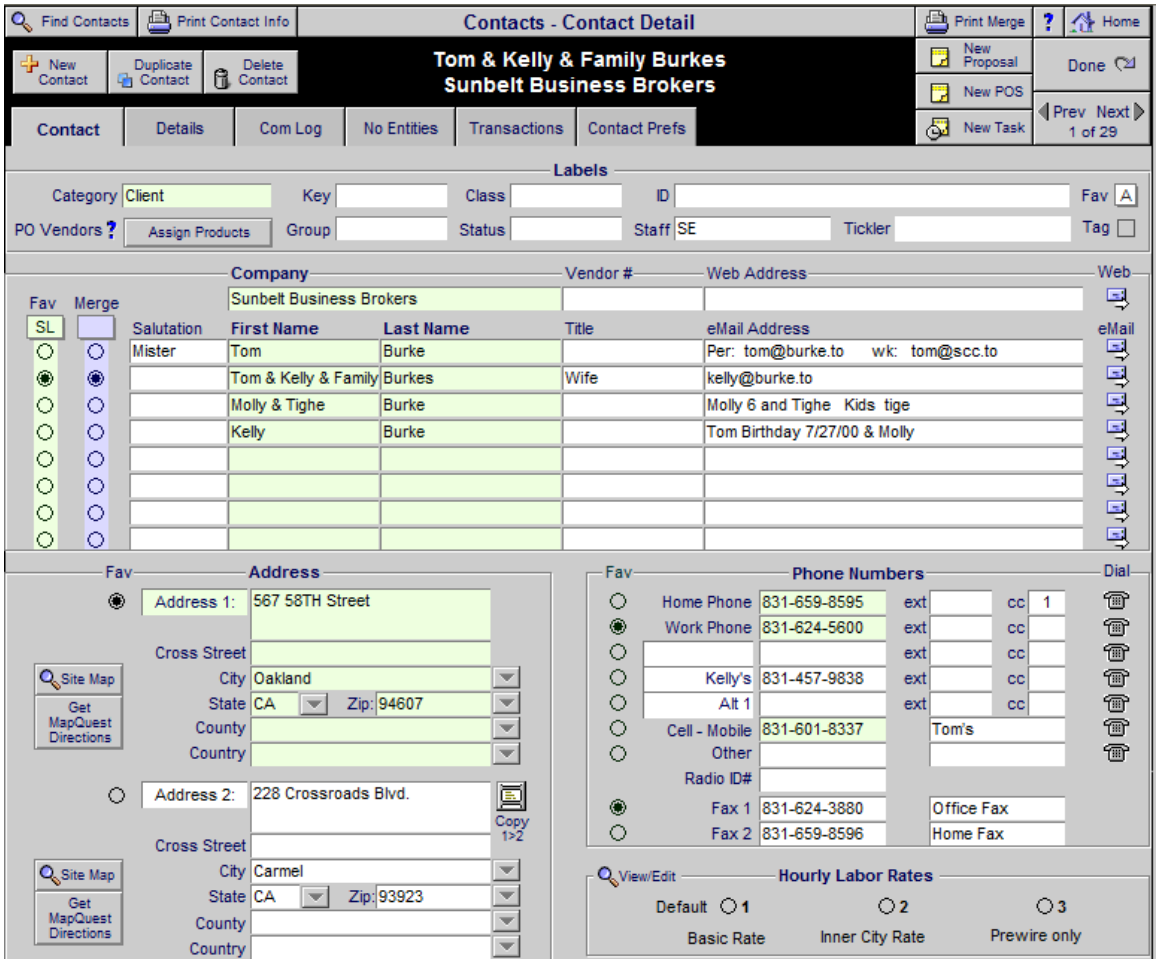


Enhancement – Preferences/Labor/Parts/Wire/Task Groups
The Pop Up Group list now only shows Groups that are Classified a "Product". Groups Classified as "Parts" and "Wire" automatically pick up the Default labor time for Parts and Wire and do not show up in the pop up list. This makes assigning Group Labor easier and simpler.

Enhancement – Preferences/Labor/Report: Show labor for all Groups
The Group Labor Report that you can print from the Preferences/Labor screen now shows all Labor Groups classified as Product, Parts and Labor and accurately shows all of the labor times and totals for each Group.

Enhancement –System Utilities/Unlock Entity: Speed
The speed of the Unlock Entity utility process has been improved and navigating from the Change Order List screen to the Project List no longer triggers the Entity Lock. Also navigating from the Project Tracker screen to the Master Tracker automatically unlocks the entity.

Enhancement – Contact Module: Improved GUI Layout
All Contact screen layouts have been improved for better clarity.

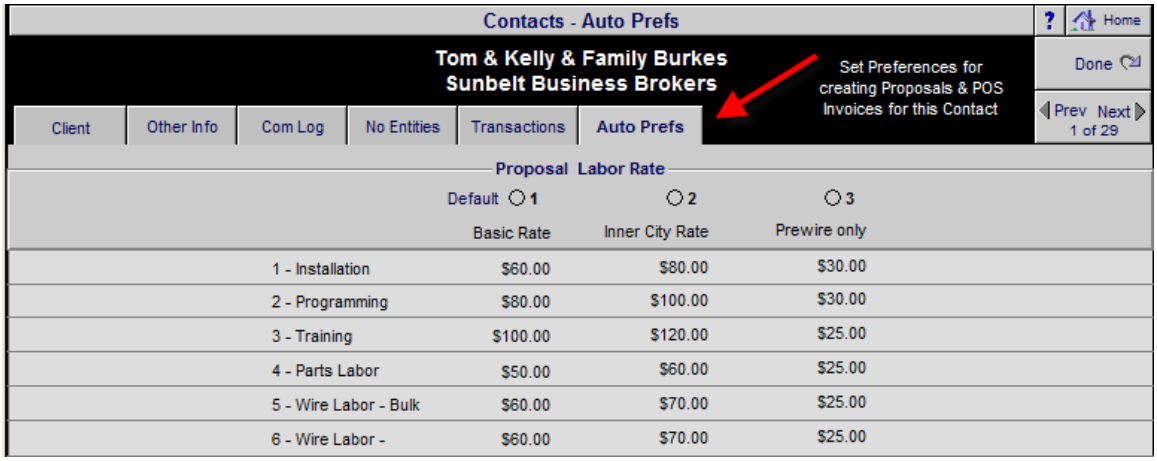


Enhancement – Contact / Detail: Labels

All Contact Labels now have self generating pop up lists (simply entering a value into a Label field will auto add it to the pop up list). All Labels are also now in the Find Contacts screen so you can easily find Contacts by Label.

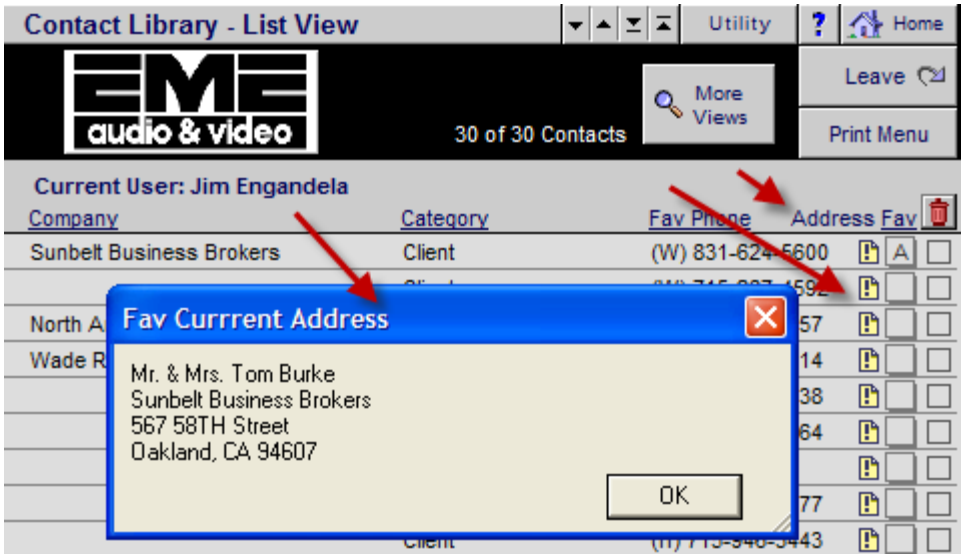
Enhancement – Contact / Detail / Contact Prefs: New Screen & Features

This new Contact Preferences screen enables you to set preferences for specific Contacts so that new Proposals will automatically take on these settings. More Prefs like Proposal Discounts, etc will be added based on SmartPartner input. Let us know what you would like.



Enhancement – Contact/Lists: Address Pop Up field

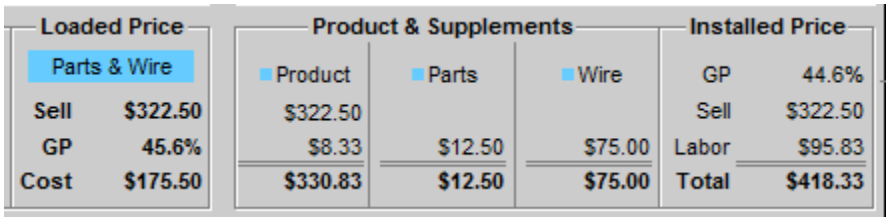
All Contact List screens now have a pop up field that displays the Contact Favorite Current Address



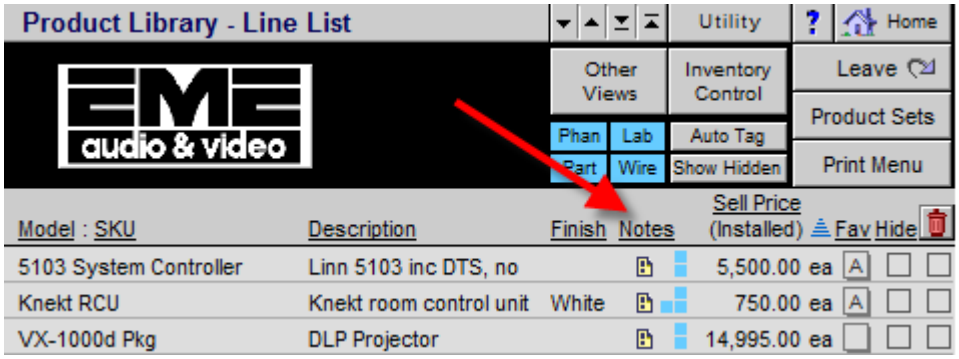
Enhancement – Product Library: Phantom Products, Parts & Wires

You can now create Phantom Products that consist of both Parts & Wires. Make sure that all of your current Phantom Products are Classified as a "Product" and not a "Part" or "Wire". New Phantom Products will automatically be Classified as "Product".

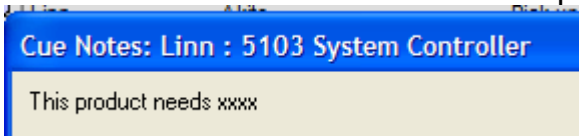
You can then assign both Parts and Wires to the Phantom Product and the Price of the Phantom Product will be the total of the all of the Parts and Wires.



Enhancement – Product Library: Add Notes header label
Clicking on the underlined Notes Header Label finds all Products that have a Note attached to them.



Enhancement – Product Library Cue Notes: Add Product Make:Model
Add Make and Model to the Cue Notes pop up message for easier reference.

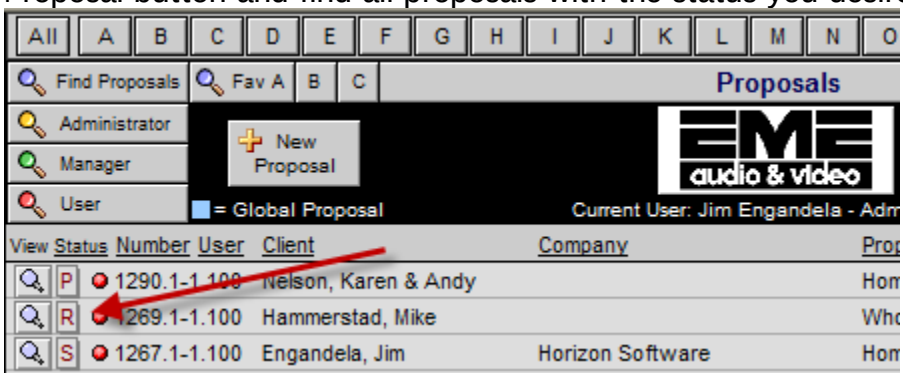


Enhancement – Logo Screen: Create New or View Existing Option
When you click on the Proposal button you now have an Option to create a New Proposal or View your existing ones. This speeds up the process of creating new proposals and is better when creating a new proposal front of a client.

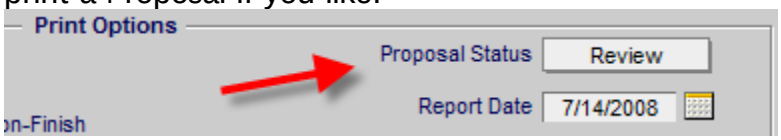
Enhancement – Proposal List: Proposal Status Flag
You can now set a Status flag on your proposals to indicate the status of each Proposal. Status: P = Progress, R = Review, S = Sent.

Setting the Status Flag to “Sent” will lock the Proposal and only allow you to View all Proposal screens, but not make any changes to the Proposal.

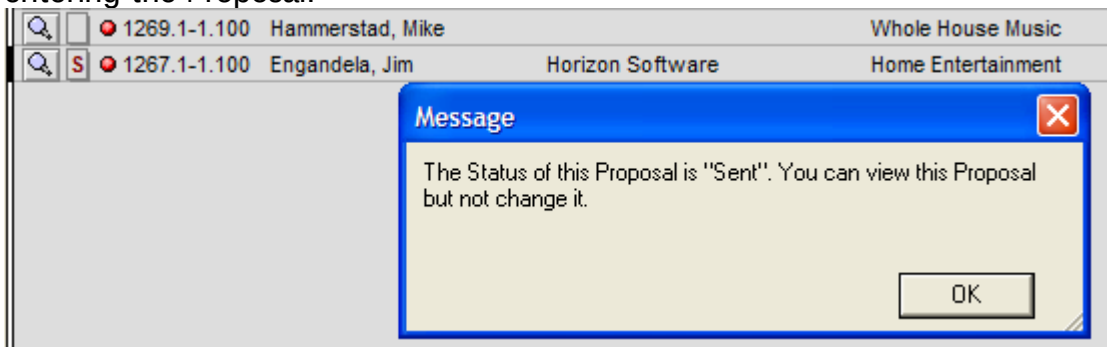
By clicking on the underlined Status header your proposal will be sorted in that order with the blank ones sorted at the bottom. You can also use the Find Proposal button and find all proposals with the status you desire.



The Proposal Print Menu also has the Status Flag that you can set when you print a Proposal if you like.

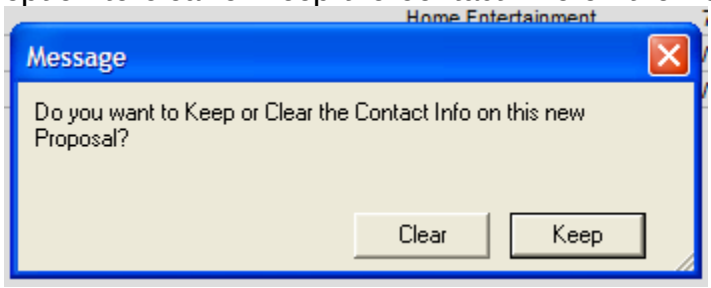


When the Proposal Status flag is set to "Sent" this message will pop up when entering the Proposal.



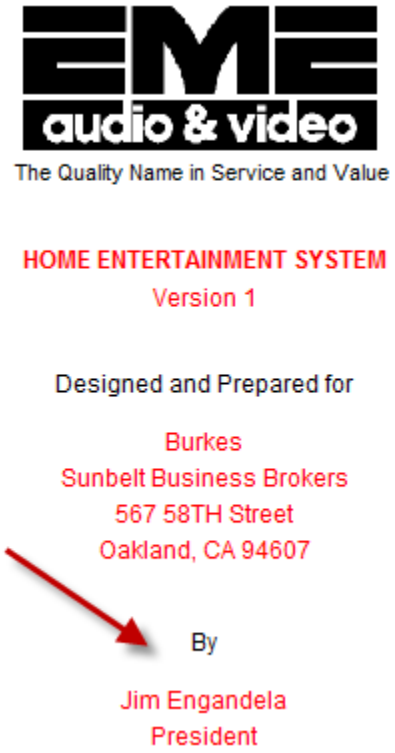
Enhancement – Proposal List/Proposal Duplication: Clear Contact Info

When Duplicating a Proposal with a New Proposal Number you now have the option to Clear or Keep the Contact Info on the Duplicated Proposal.



Enhancement – Proposal/Print Menu: Cover Page Salesman's Name

You can now show the Salesman's Name and Title on the Proposal Cover Page.



You can set this Preference on the Master Prefs/Proposals/Cover Page screen. Check "Yes" if you wish to show it and enter text (By) if you wish.

This name will only appear on New Proposals. You can, however, go into the Proposal/Print Menu/Preferences/Proposal Cover Page screen and set this feature for each proposal.

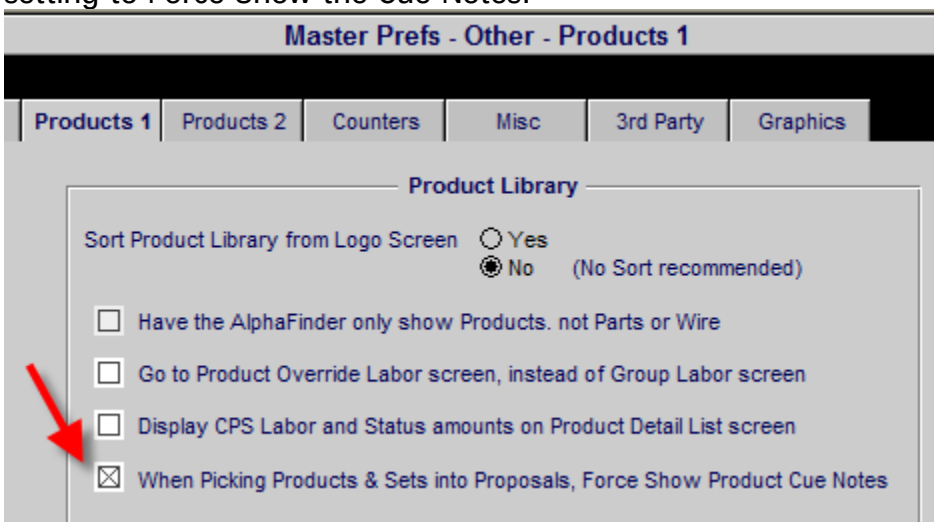
You can also click on the "Update All Proposals" button, in the Master Prefs/Proposals/Cover Page and update all of your existing Proposals and Projects.

Enhancement – Proposal and POS Pick Product / Force Cue Notes
When Picking Product or Sets into a Proposal you can now specify in your Master Preferences/Other/Product 1 screen to Force Show the Cue Notes to pop up when you click on the Pick Products/Sets button.

Each Cue Note has a Next Note and a Pick Products option that enables you to simply see the next note or select more products that may be specified by the Cue Note.

Once you have looked at each Cue Note all of the products that you have selected will be added automatically to your Proposal.

This option also works for Picking POS products, by setting the Master Prefs/POS setting to Force Show the Cue Notes.

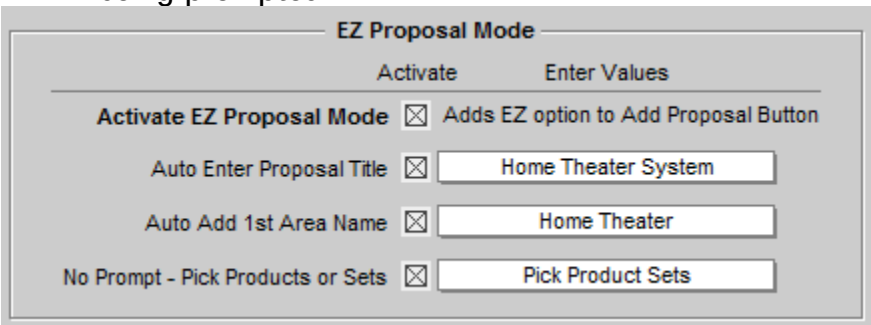


Enhancement – Proposal/EZ Proposal Mode

The EZ Proposal Mode lets you choose a fast method of creating your proposal in front of your client. The EZ mode takes you directly to Pick/Add a Contact, then EZ adds the 1st Area to your Proposal with a default area name, then EZ takes you directly to either Pick Sets or Pick Products screen, depending on your default preference. Then all you have to do is add more Areas/Sets/Products or Print the Proposal for your client.

Setup the EZ Mode in the Master Preferences/Other/Proposals screen.

- Check Activate the EZ Proposal Mode.
- Check Auto Enter Proposal Title and Enter the desired Proposal Title.
- Check Auto Add 1st Area Name and Enter the desired Area Name (blank will add "Rename Area").
- Check No Prompt - Pick Products or Pick Sets and Enter the type of Option to automatically enter the Pick Products or Pick Sets screens, without being prompted.

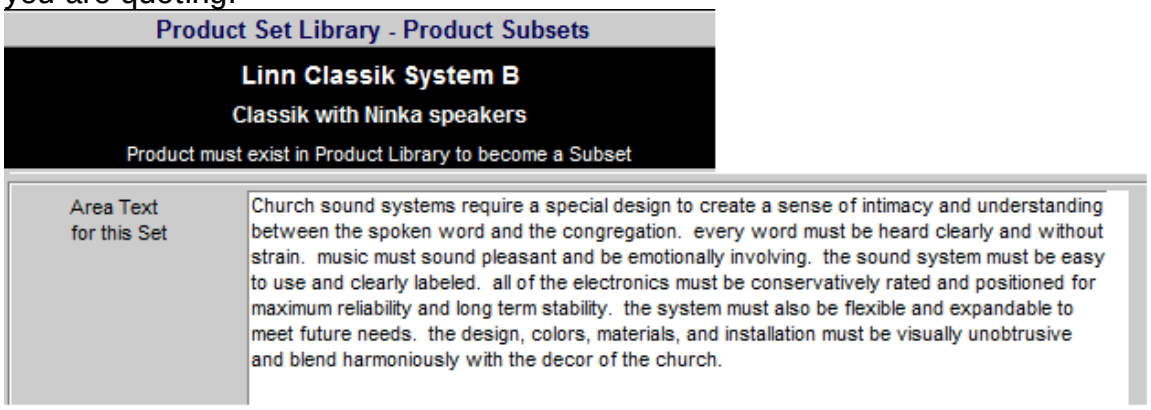


Enhancement – Proposal/Pick Sets with Area Text

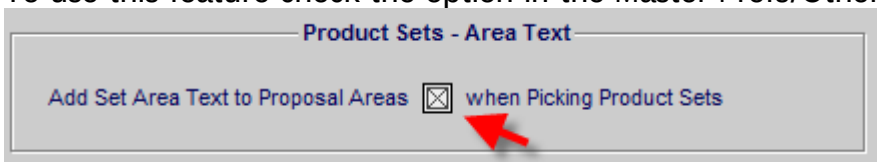
You can now add Area Text to your Product Sets, on the Set Detail screen in your Product Set Library.

When you Pick Sets to add to an Area in your Proposal, the Set Area Text from All of the Sets you are Picking, will merge together and be entered automatically into the Area Text of the Area you are Picking the Sets into.

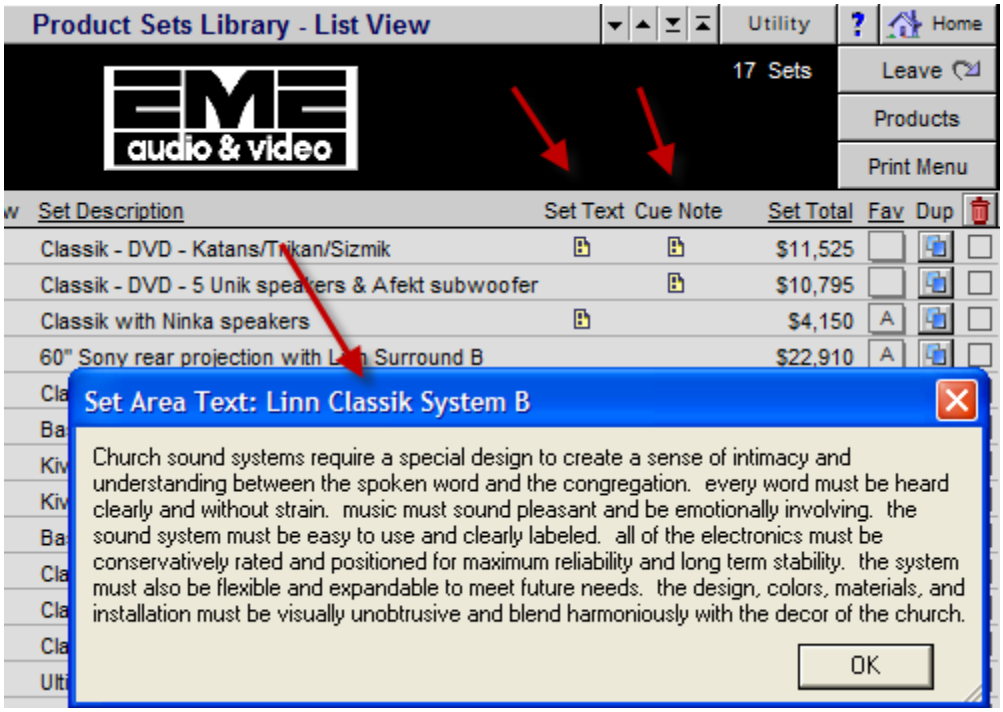
This Area Text will then Print on your Proposal reports to describe the Products you are quoting.



To use this feature check the option in the Master Prefs/Other/Proposals screen.

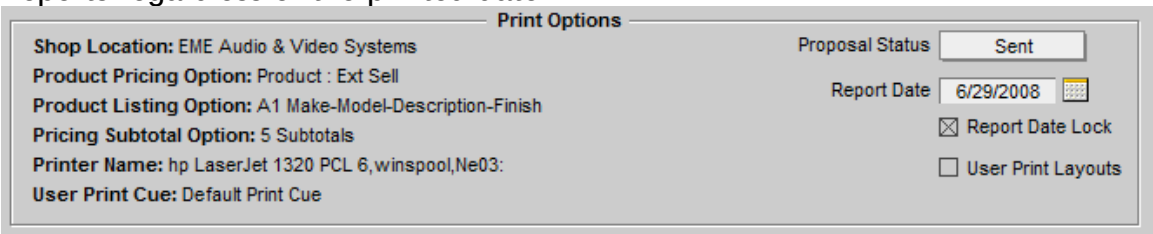


Clicking on the Area Text and Cue Note Icons, in the Sets Library will Pop Up Menus with Area Text and Cue Note info.



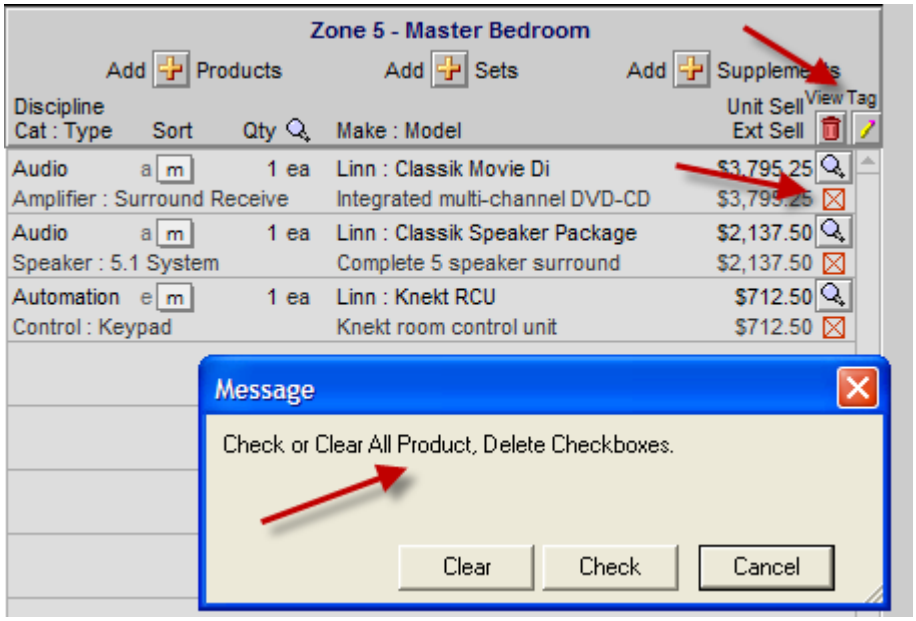
Enhancement – Proposal / Print Menu: Print Option Display

Improved display of primary print options and Proposal Status and Date Lock feature with Calendar pop up. Date lock with fix this date on all Proposal Reports regardless of the printed date.



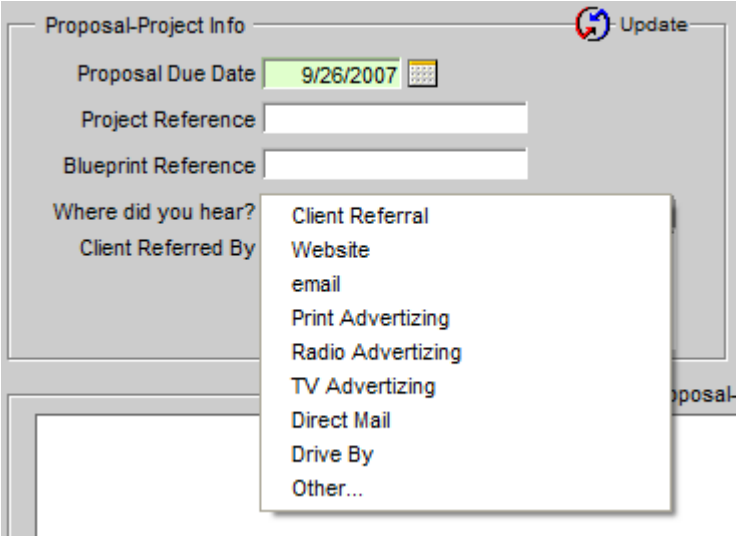
Enhancement – Proposal / Areas & Products: Tag Delete Check boxes

Clicking on the Tag button will give you the option to Tag or Clear the Delete Checkboxes on All of the Products in the Area Portal.



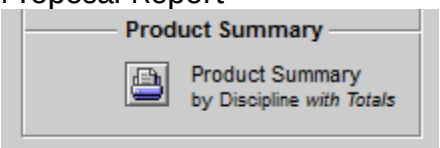
Enhancement – Proposal / Client Detail: Where did you hear?

A pop up field for entering where you client heard about your shop has been added.

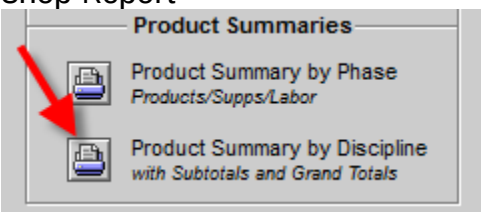


Enhancement – Proposal/Print Menu/Shop: Report Discipline-Totals
Two new Proposal and Shop reports have been added that are similar to the Proposal Product Summary report, with the addition of Discipline Subtotals and Grand Totals. The Shop report also includes Cost and Profit by Discipline.

Proposal Report



Shop Report



7/3/2008

EME Audio & Video Systems - Confidential Report

Product Summary by Discipline with Totals

John & Mary Smith
Home Entertainment System
1290.1-1.100

Page 1

Product Summary

AUDIO

1 ea Linn : 5125 : Five channel power amplifier (Black) : Silver
The Linn AV 5125 5-channel Class V modular power amplifier features the latest Linn switch mode power supply and amplification technology.

5 pr Linn : Katan : Bookshelf loudpeakers: pair : Black
The Katan loudspeaker is an attractive, compact, two-way bass reflex loudspeaker designed for multi-channel applications.

1 ea Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black

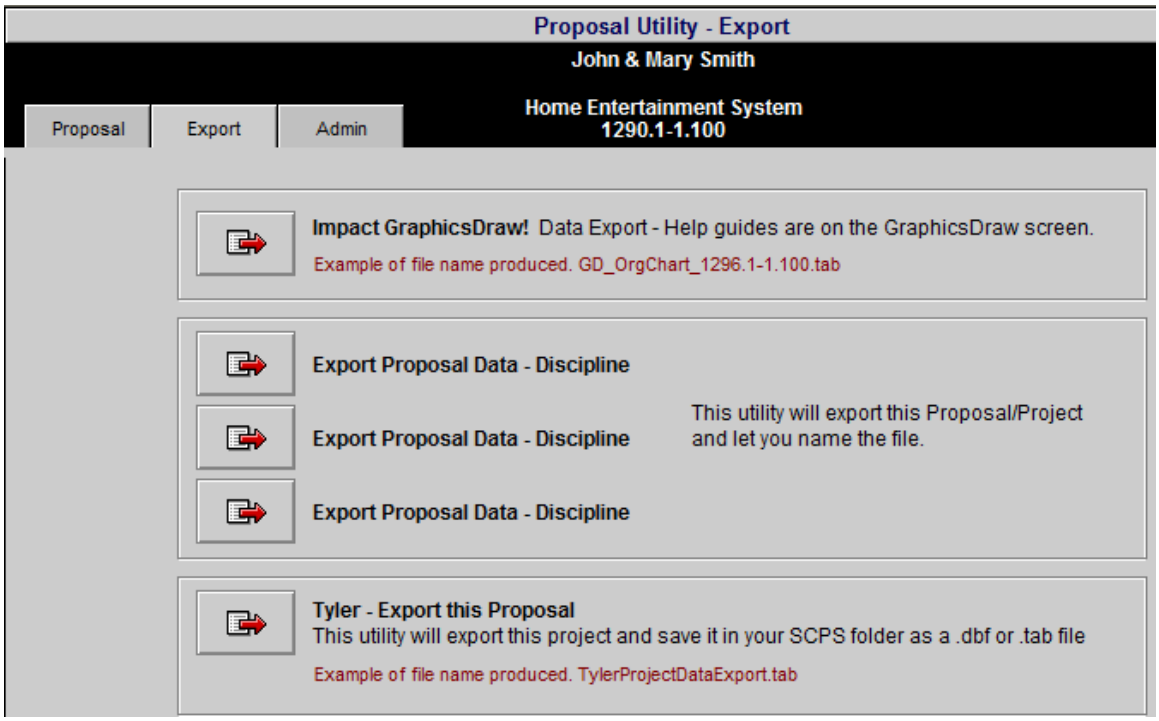
Equipment	12,675.00	7,605.00	40.0%	
Installation	497.50	272.08	45.3%	
Misc. Parts	95.00	57.00	40.0%	
Wire & Cable	1,826.25	1,094.25	40.1%	
Total	**15,093.75**	**9,028.33**	**40.2%**	**8:00:00**
Tax	830.16			
	15,923.91			

Enhancement – Proposal / Project / Utility: Export and Admin Tabs

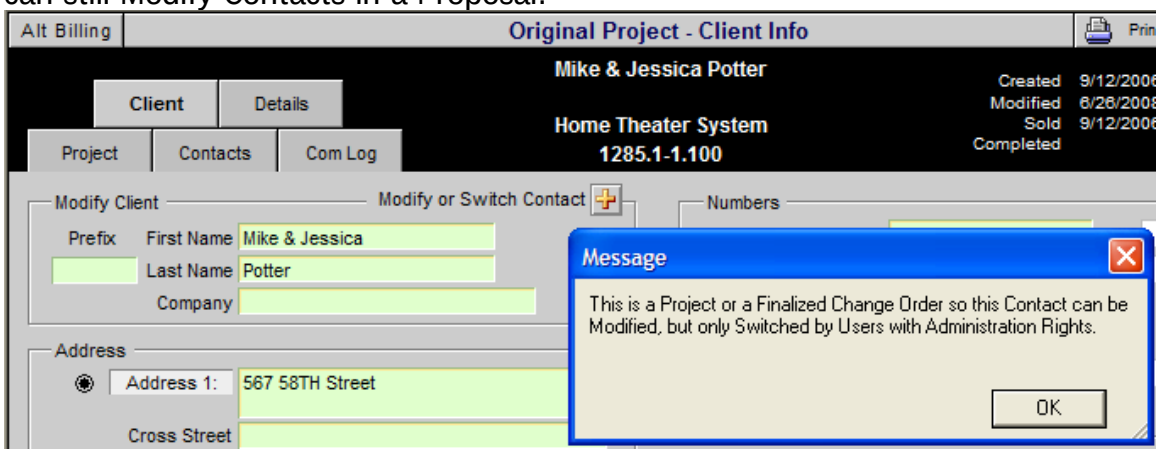
New separate screens in both Proposal and Project Utilities for Export and Administration Utilities.

Tyler Export Proposal

A utility to export the Proposal and Project data into a file that is stored in your SCPS folder and can be opened by Excel has been created. It contains proposal/client and area/product data.



Enhancement – Projects/Client: Switching Contacts by Administrators
Users with Administrator rights can now Switch Contacts in a Project. All users can still Modify Contacts in a Proposal.

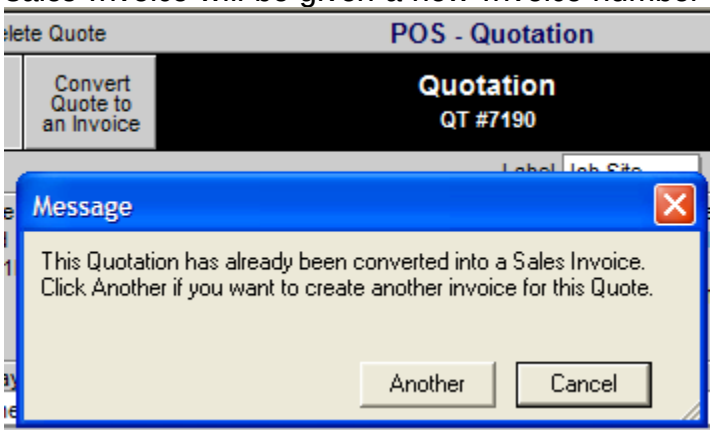


Enhancement – Projects/Client: Switching Tax Rate by Administrators
Users with Administrator rights can now Switch Tax Rates in a Project. All users can still Modify Contacts in a Proposal.

Enhancement – POS/Invoice/Setup: Add Contact Notes to all screens
The Permanent Contact Notes field has been added to all POS Invoice screens for quick reference and making notes that will be permanently stored in the Contact library.

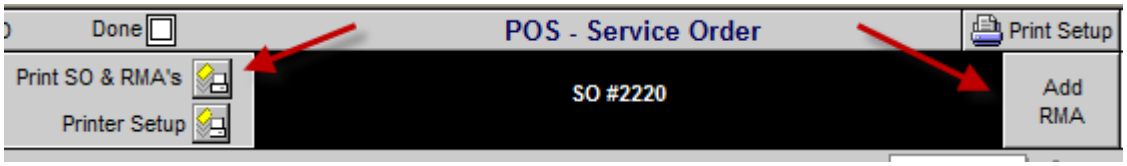
Enhancement – POS/Quotation: Create another Sales Invoice

When Converting a Quotation to a Sales Invoice you now have the option to create another Sales Invoice even if one has already been created. The new Sales Invoice will be given a new Invoice number as well.

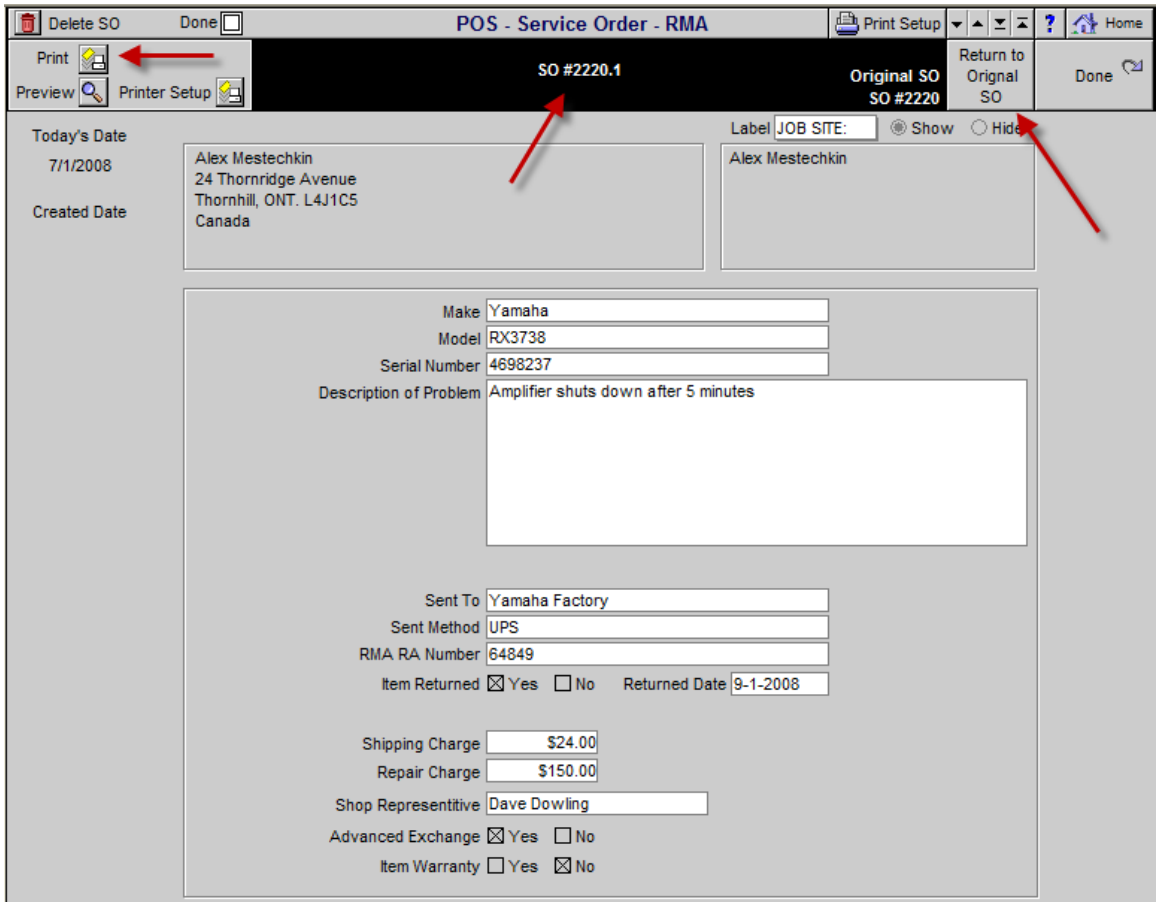


Enhancement – POS/Service Order: Add RMA invoices to Service Order

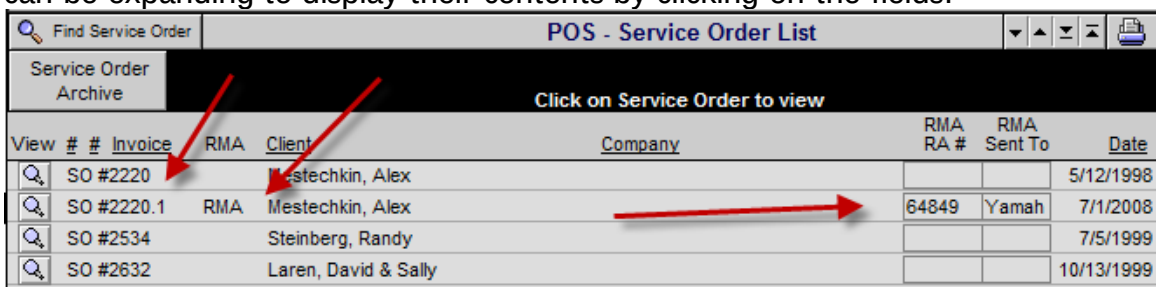
You can now add RMA invoices to your Service Orders by clicking on the Add RMA button. You can Print the SO and all of the RMA's at one time with the Print button.



RMA Invoices are created with sequential numbers referenced to the Original Service Order. You can print up to 3 copies of the RMA with the print button. You can return to the Original Service Order with the Return button.

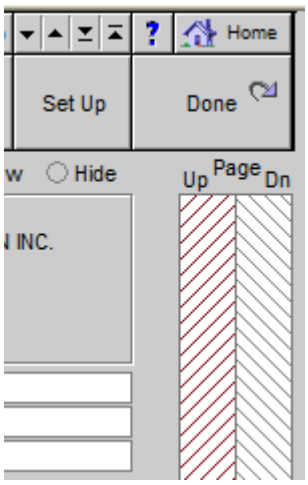


The Service Order list now shows the original SO with the SO RMA below it. The RMA RA# and the RMA Sent To fields are displayed on the SO List screen and can be expanding to display their contents by clicking on the fields.



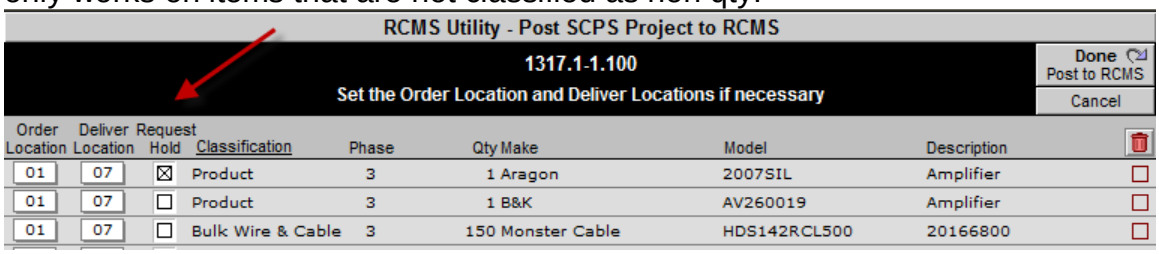
Enhancement – POS/Service Order: Page Up & Page Down Bars

When viewing a single record screen FileMaker does not enable you to use the Windows scroll bar or mouse scroll button, so we came up with this feature. Clicking on the Up or Down Strip will page your screen one page at a time.



Enhancement – RCMS: Inventory Request Hold
When Pumping up an SCPS Project into RCMS each item can be placed on Hold with an H code based on the qty available in stock.

You now have a Request Hold check box to make your selection. The checkbox only works on items that are not classified as non qty.

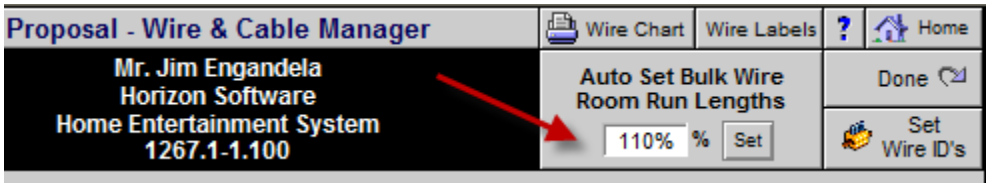


Fix – Preferences/Groups: Auto Populate blank Classes and Phases
During the upgrade process blank Group Classes and Phases are auto entered with default values. The Upgrade also removes Labor Times assigned to Groups classified as Parts or Wire.

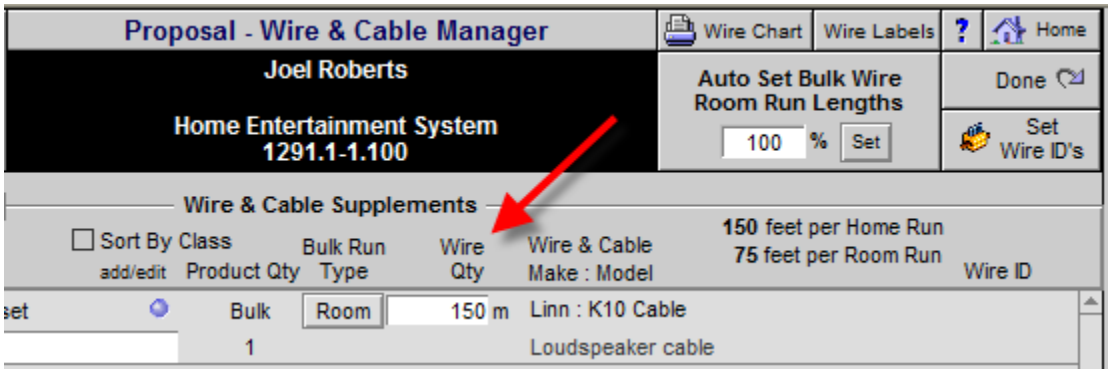
Fix – Contact/Contact Detail: Consolidate multiple Detail Screens
Consolidate these Add & Modify Contact screens for Proposals & POS into one new one screen for a more consistent GUI.

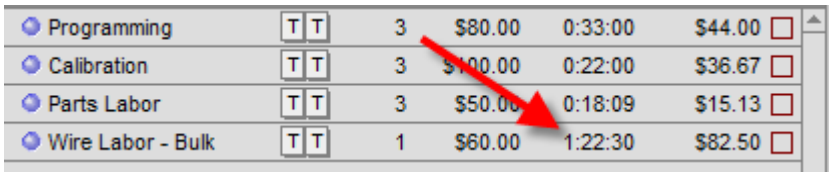
Fix – Proposal/Supplements/Wire: Wire Labor Time with DOD
When adding Wire Supplements to a Proposal the Degree of Difficulty was being added to the base Labor Time and this was, in effect, doubling the DOD on wire supplements. This has been corrected.

Fix – Proposal/Supplements/Wire/Wire Manager: Set Room Lengths
Using this feature now sorts the Wire portal properly and computes the correct increase or decrease to the Bulk Wire Room Run lengths.



Fix – Proposal/Supplements/Wire/Wire Manager: Labor Time
Changing the Wire Qty either by changing the Bulk Run Type from Home to Room or by manually changing the Wire Qty now automatically changes the Wire Labor Time.





Fix – Proposal/Product List: New Quantity cannot be zero.
When changing the Product Qty to Zero, a pop up message warns that this cannot be done, but fails to go away. This has been corrected.

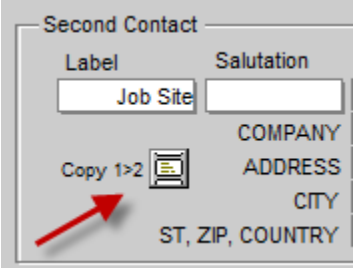
Fix – Proposal/Project Details: Get Map Quest Map
A new map routine and Map screens now properly connect to Map Quest Online. Larger Map fields display a larger map.

Fix – Project/Print Menu/Shop: Printing Staple Up Cards
Under some circumstances all of the Staple up card were being printed regardless if the "Issue Staple Up Cards" checkbox was checked on the Product or not. This has been corrected.

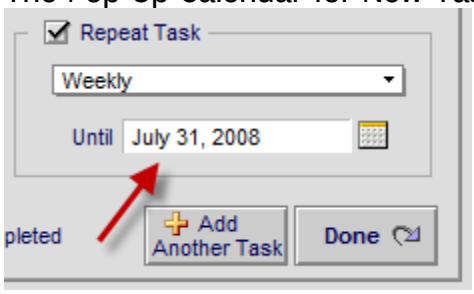
Fix – Project/Wire Supplements/View Only
The Project Wire Supplements – View Only screen now displays all of the Wire Supplements.

Fix – POS/Invoice/Setup: Fix Copy Address 1 to Address 2

This feature now properly copies the POS Invoice Address 1 into the Address 2 fields.

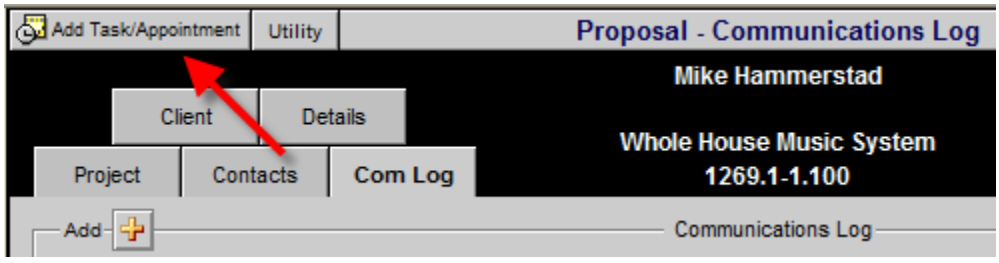


Fix – Master Tracker/New Task: Pop Up Date Calendar
The Pop Up Calendar for New Tasks now works properly.



SCPS Version 6.8
Released: 6/1/2008

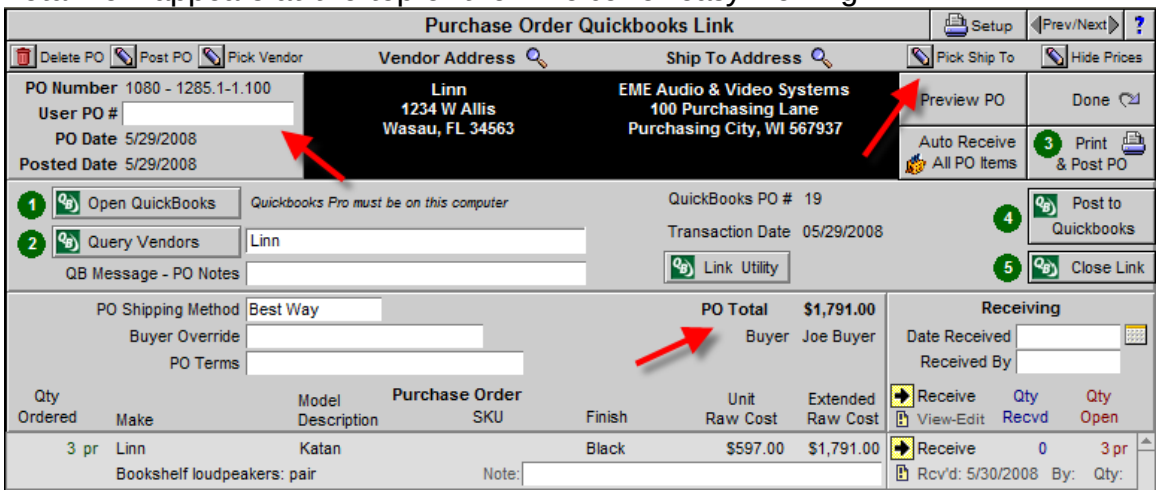
Enhancement – Proposal/Project Communications Log: Add Task
The Add Tracker Task/Appointment feature has been added to these screens so that you can add Tasks and Appointments directly to the Master Tracker and return to these screens.



Enhancement – Project/QuickBooks PO: Receiving Products Updating
Existing Purchase Order Product Quantities in QuickBooks are now automatically updated when they are received in SCPS.

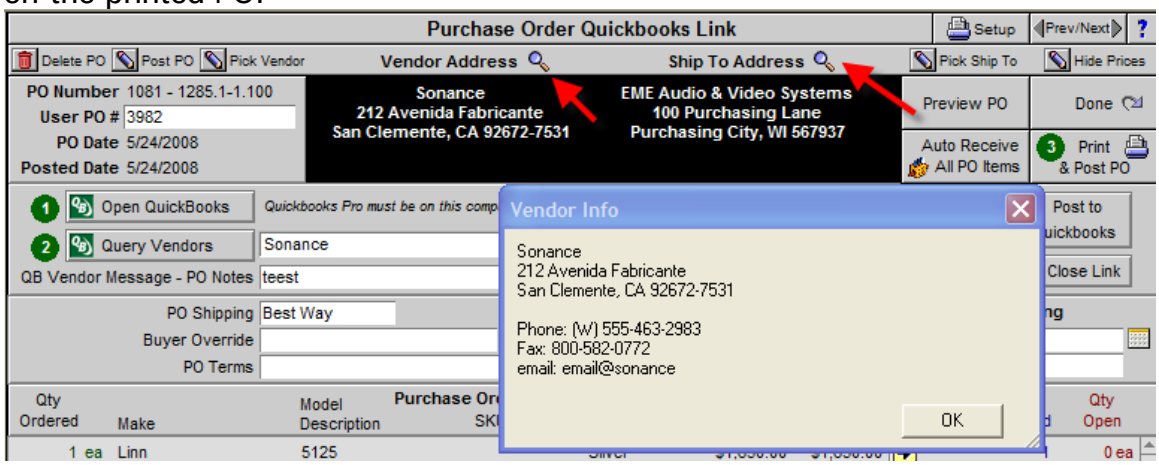
Enhancement – Project/PO: User PO Number
Users can now add their own PO number and this will override the SCPS assigned number for both regular and QuickBooks users. This user PO number

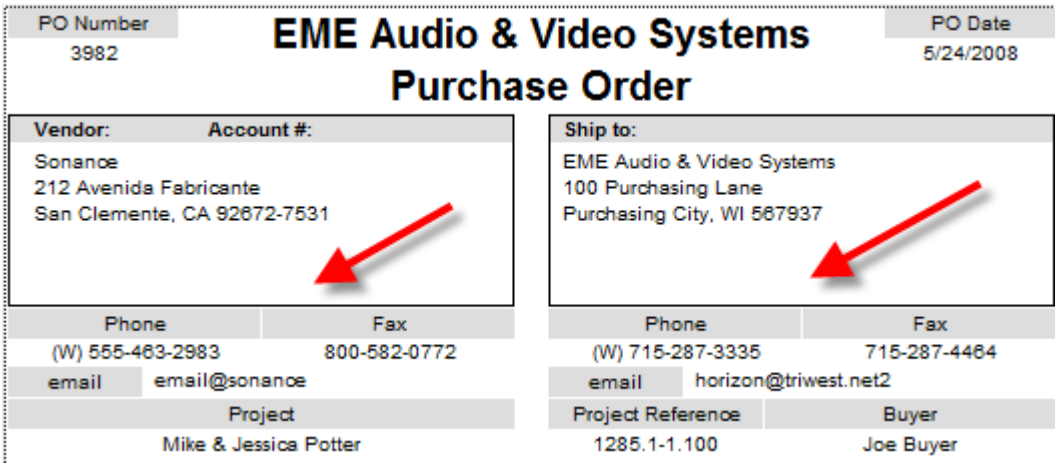
will also be automatically placed in the PO Message field in QuickBooks. The PO Total now appears at the top of the Invoice for easy viewing.



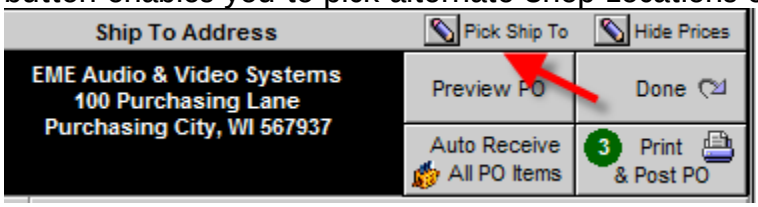
Enhancement – Project / PO: Address pop up's

Clicking on these icons will pop up the complete addresses with phone and fax numbers for easy reference. These phone and fax numbers also show up now on the printed PO.





Enhancement – Project PO/PO Invoice: "Pick Ship To" default
The Ship To Address now defaults to the Shop Location and the Pick Ship To button enables you to pick alternate Shop Locations or Vendors or Contacts.

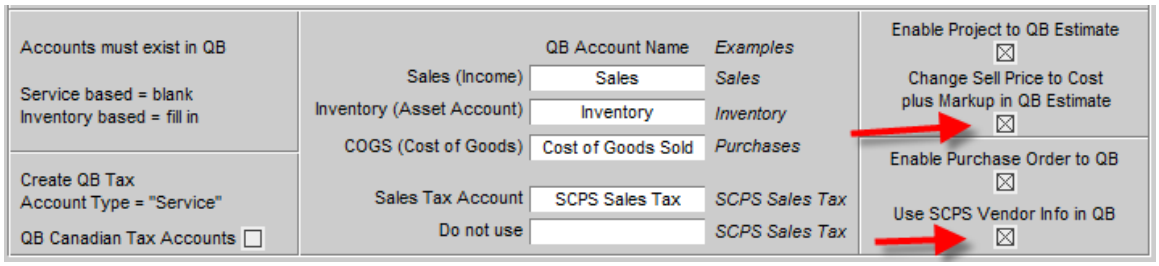


Enhancement – Project/PO/QuickBooks PO: Misc Enhancements

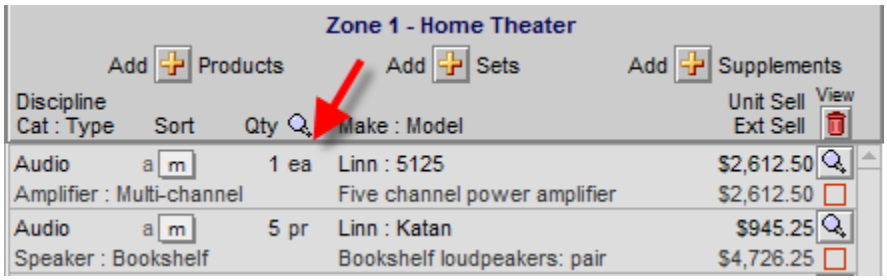
1. Add QB Test on the PO Receiving button to notify if QB is not open.
2. Add QB Trap and message if no qty is entered when receiving items.

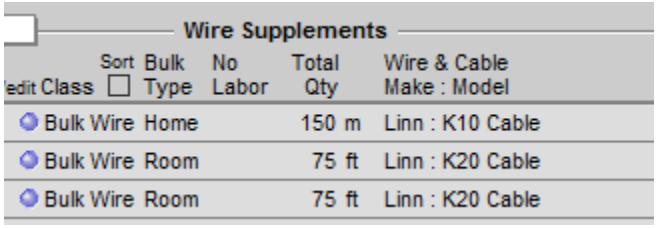
Enhancement – Project/QuickBooks Invoice: Estimate Cost & Vendor
Users can now select to show the Cost of items plus Markup instead of the Product Cost on their QuickBooks Estimate.

Users can now select to have the SCPS Vendor override the QB Vendor information.



Fix – Proposal/Product Qty: Adjust Wire when changing Product Qty
When you change the Quantity of a Product, the Bulk Wire length and Pre Cut Qty on all associated Wire supplements is now properly adjusted. This was not working properly for users who have selected the Itemized Wire option in their Preferences.



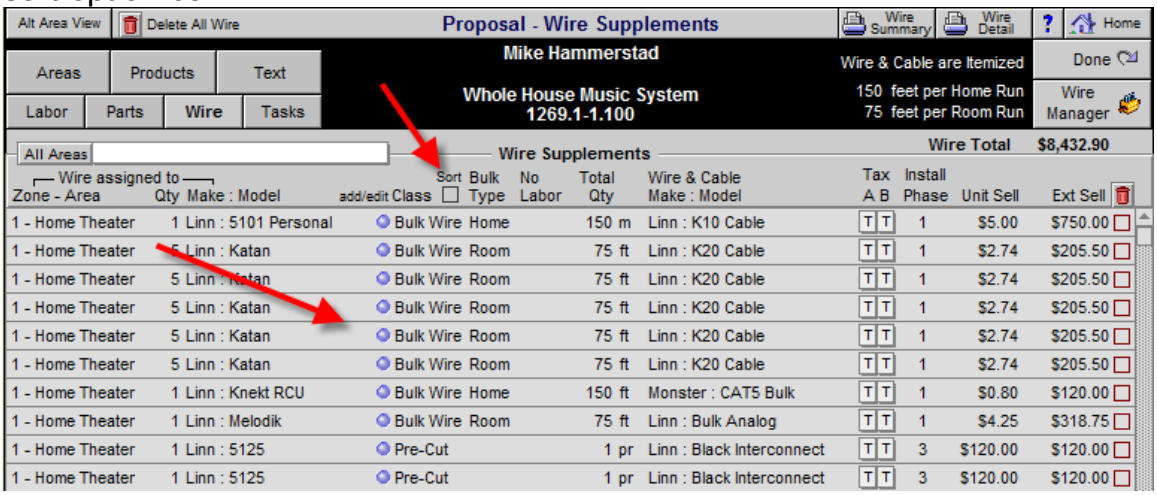


Wire Supplements

edit	Class	Sort ☐	Bulk Type	No Labor	Total Qty	Wire & Cable Make : Model
	Bulk Wire		Home		150 m	Linn : K10 Cable
	Bulk Wire		Room		75 ft	Linn : K20 Cable
	Bulk Wire		Room		75 ft	Linn : K20 Cable

Fix – Proposal / Wire Supplements: Advanced Wire Sorting

Wire Supplements now sort properly by Area/Bulk Wire/Pre-Cut Wire. Users can also sort by Bulk Wire/Make/Model the Precut Wire/Make Model by checking the Sort option box.



Alt Area View | Delete All Wire | Proposal - Wire Supplements | Wire Summary | Wire Detail | ? | Home

Areas | Products | Text | Labor | Parts | Wire | Tasks

Mike Hammerstad

Whole House Music System
1269.1-1.100

Wire & Cable are Itemized
150 feet per Home Run
75 feet per Room Run

Done | Wire Manager

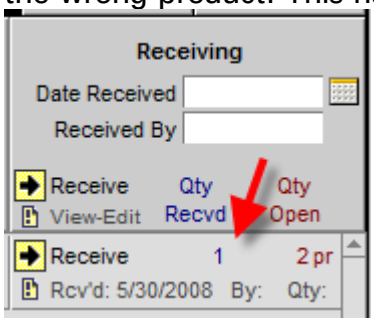
All Areas

Wire Supplements — Wire Total $8,432.90

Wire assigned to Zone - Area	Qty	Make : Model	add/edit	Class	Sort ☐	Bulk Type	No Labor	Total Qty	Wire & Cable Make : Model	Tax A	Tax B	Install Phase	Unit Sell	Ext Sell
1 - Home Theater	1	Linn : 5101 Personal		Bulk Wire		Home		150 m	Linn : K10 Cable	T	T	1	$5.00	$750.00
1 - Home Theater	5	Linn : Katan		Bulk Wire		Room		75 ft	Linn : K20 Cable	T	T	1	$2.74	$205.50
1 - Home Theater	5	Linn : Katan		Bulk Wire		Room		75 ft	Linn : K20 Cable	T	T	1	$2.74	$205.50
1 - Home Theater	5	Linn : Katan		Bulk Wire		Room		75 ft	Linn : K20 Cable	T	T	1	$2.74	$205.50
1 - Home Theater	5	Linn : Katan		Bulk Wire		Room		75 ft	Linn : K20 Cable	T	T	1	$2.74	$205.50
1 - Home Theater	5	Linn : Katan		Bulk Wire		Room		75 ft	Linn : K20 Cable	T	T	1	$2.74	$205.50
1 - Home Theater	1	Linn : Knekt RCU		Bulk Wire		Home		150 ft	Monster : CAT5 Bulk	T	T	1	$0.80	$120.00
1 - Home Theater	1	Linn : Melodik		Bulk Wire		Room		75 ft	Linn : Bulk Analog	T	T	1	$4.25	$318.75
1 - Home Theater	1	Linn : 5125		Pre-Cut				1 pr	Linn : Black Interconnect	T	T	3	$120.00	$120.00
1 - Home Theater	1	Linn : 5125		Pre-Cut				1 pr	Linn : Black Interconnect	T	T	3	$120.00	$120.00

Fix – Project / PO: Receive Products on correct item

When receiving products on a Purchase Order occasionally the qty was posted on the wrong product. This has been corrected.



Receiving

Date Received
Received By

Receive / View-Edit	Qty Recvd	Qty Open
Receive	1	2 pr
Rcv'd: 5/30/2008 By:	Qty:	

Fix – Project / Invoices: Misc Fixes

1. SCPS QuickBooks Invoices now accept "&" in contact name.
2. When deleting an Invoice the Qty on Main screens are now deleted.

Fix – Proposal / Print Menu / Add Pre-Cut Wires

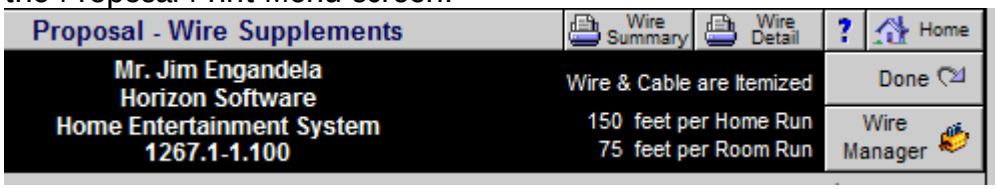
Master Proposal and Wire Supplement Reports now properly show Pre-Cut Wires.

Wire & Cable

Wire Type	Qty	Wire Make : Model Assigned to Make : Model	Unit Price	Ext Price
Bulk	150 ft	Monster : CAT5 Bulk Linn : Knekt RCU	$0.80 4 - Dining Room	$120.00
Bulk	150 ft	Monster : CAT5 Bulk Linn : Knekt RCU	$0.80 4 - Kitchen	$120.00
Bulk	150 ft	Monster : CAT5 Bulk Linn : Knekt RCU	$0.80 5 - Master Bedroom	$120.00
Bulk	150 ft	Monster : CAT5 Bulk Linn : Knekt RCU	$0.80 3 - Office	$120.00
Pre-Cut	1 pr	Linn : Black Interconnect Linn : 5125	$120.00 1 - Home Theater	$120.00
Pre-Cut	1 pr	Linn : Black Interconnect Linn : 5125	$120.00 1 - Home Theater	$120.00
Pre-Cut	1 pr	Linn : Black Interconnect Linn : 5125	$120.00 1 - Home Theater	$120.00

Fix – Proposal / Wire Supplements / Wire Detail: Print correct report

The Wire Detail report on this screen now prints the correct report as it does on the Proposal Print Menu screen.

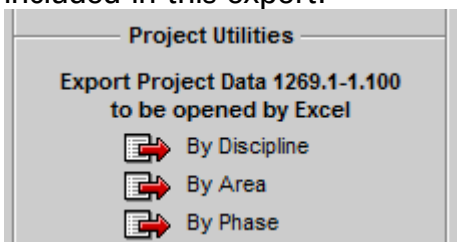


Fix – Project List / Change Order List: Release Entity Lock

When leaving he Change Order List screen and returning to the Project List screen the Entity Lock was not being released. This has been corrected.

Fix – Project / Print Menu / Shop: Data Export includes Pre-Cut wires.

Data export now includes pre-cut wires. Please note that Project Fees are not included in this export.



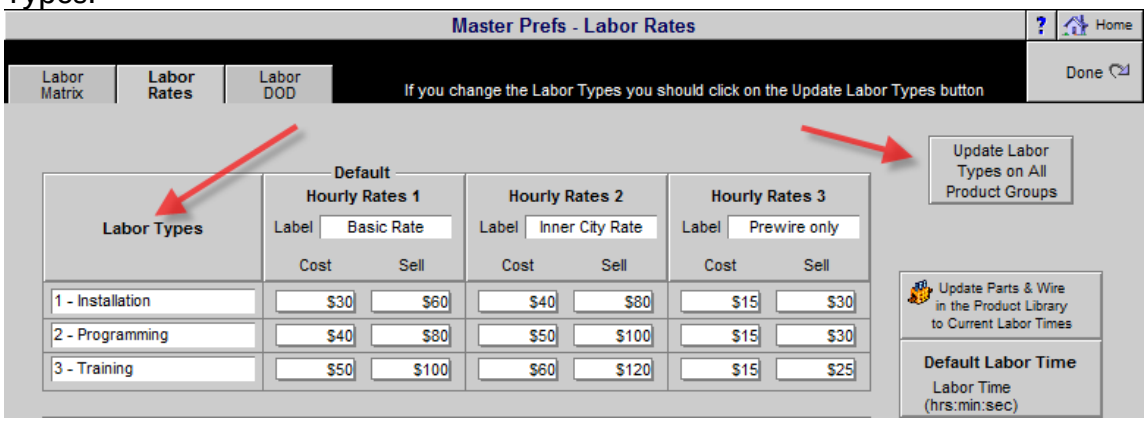
Fix – POS / Quotations & Sales Invoices: Hide Product Cost fields

Product Cost fields are now completely hidden so that any values in these fields will not show on the Invoice screen. Please click on the Invoice Cost button to view the Product Costs.

SCPS Version 6.7
Released: 5/13/2008

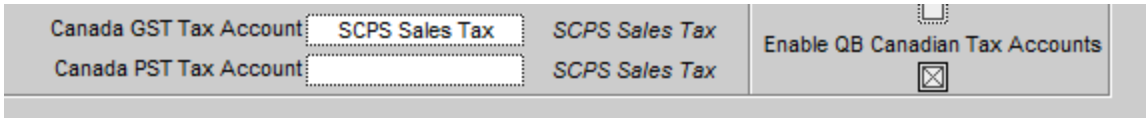
Enhancement – Master Prefs/Labor/Labor Rates: Update Labor Types

Changing the Labor Types no longer changes the labor types in your Existing Proposals & Projects (which is how it should be). You can now Update the Labor Types on all of your Product Groups in the Prefs and your Product Library with this utility and you should click on it, if you change the names of your Labor Types.

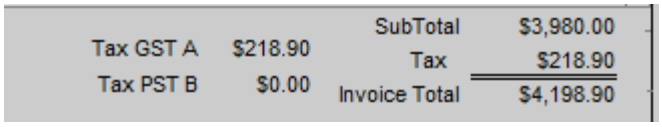


Enhancement – Master Prefs/Bookkeeping/Quickbooks Canadian GST PST (AB) Tax Accounts

Added support for Canadian GST PST taxes into Quickbooks Invoices and Estimates. Canadian users should go into Preferences/Bookkeeping/Quickbooks and check the QB Canadian Tax Accounts check box and then add their QB GST & PST Tax Account Names.

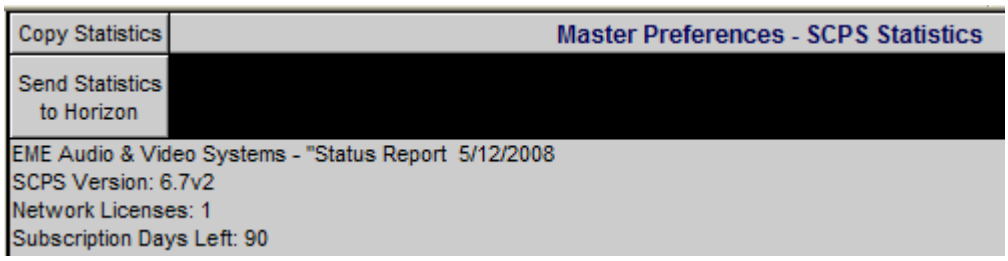


SCPS Project Sales Invoices now display the GST PST Tax breakout at the bottom of the screen.



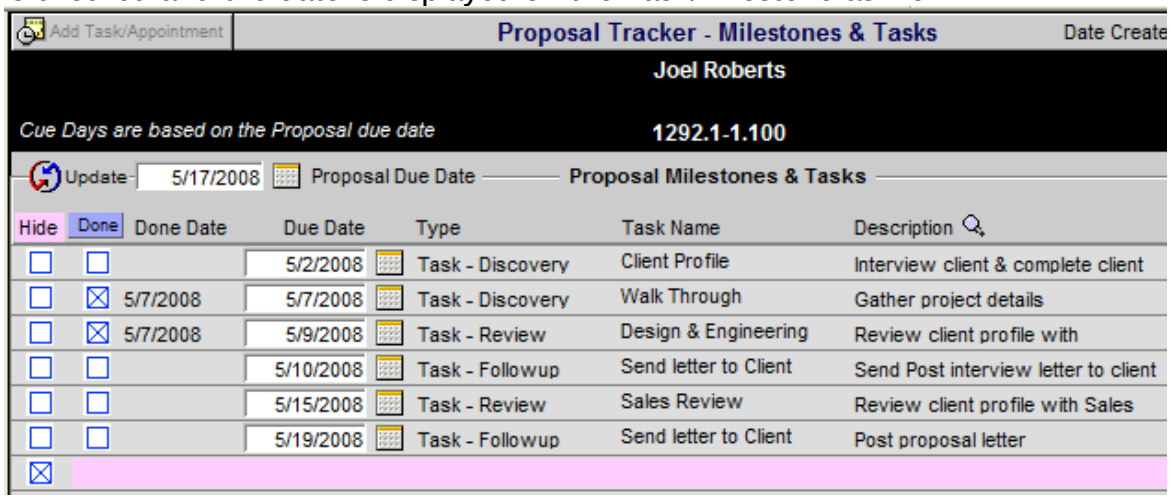
Enhancement – Master Prefs/Horizon/Statistics: Statistics Report

This screen displays many statistics about your SmartPartner software and can be viewed on screen, copied into Word or emailed to Horizon.



Enhancement – Proposal, Project, Completed/Trackers: Hide and Date
All Proposal, Project and Completed Trackers now enable you to Hide Tasks and Milestones. Hidden Tasks and Milestones will be sorted to the end of the list and be covered with a purple color. They can be reactivated by unchecking the Hide checkbox.

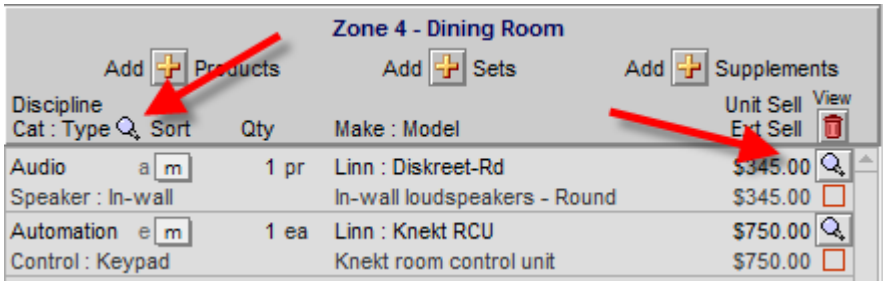
The Done Date is now stamped on the Task/Milestone when the Done checkbox is checked and the date is displayed on the Task/Milestone as well.



Enhancement – Proposal/Project: Changing info changes Tasks.
Changing the Project Manager, Salesman or Project Engineer on a Proposal or Project now automatically updates all of the Milestones and Tasks in the Master Tracker.

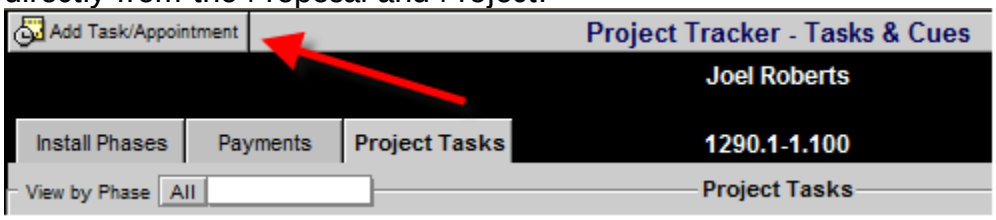
Enhancement – Proposal/Product Detail: Parts & Wire Labor
Adding Parts and Wire Supplements from the Product Detail screens now adds Parts and Wire **Labor** and removes this **Labor** when Parts & Wires are deleted.

Enhancement – Proposal/Areas & Products: New View buttons
Clicking on the Make : Model and Description fields now expand to enable you to view all of the product information. This means that you now need to either click on the Discipline or on the View button on the right to go to the Product Detail screen.

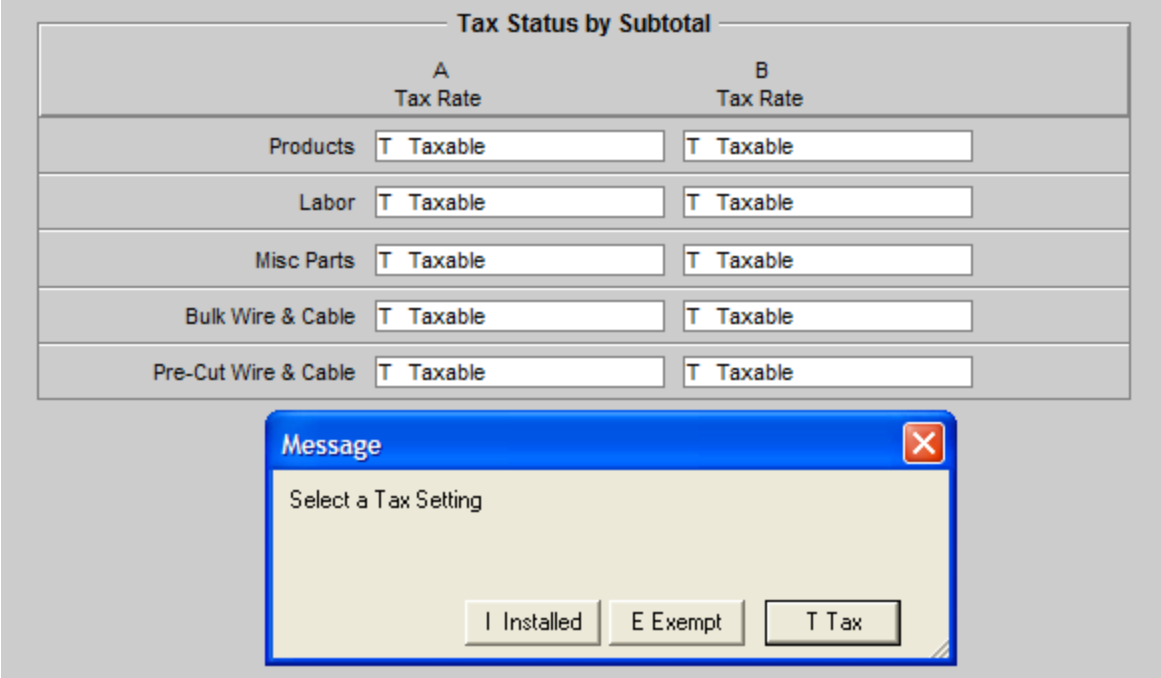


Enhancement – Proposal/Print Menu/Proposal Client Intro text
Increase the size of the text body to accommodate more text. This adjustment has also been made to the custom reports module.

Enhancement – Proposal & Project Tracker: Add Task/Appointment
The Add Task/Appointment feature in the Proposal and Project Tracker module has been enabled so that you can Add a Master Tracker Task or Appointment directly from the Proposal and Project.

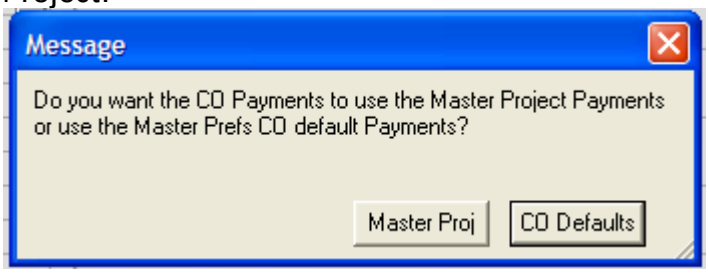


Enhancement – Proposal/Pricing/Tax Status
Incorporate the updating of all tax flags on all records when you change the Tax Flag on Products, Parts, Labor and Wire. This eliminates the separate Update button and ensures that the updating is done when the Tax Flag is changed. Tax Flags on individual Products can still be changed on the Product Tax screen and the Product Detail screen and Taxes can be changed on the Supplement screens as well, but these settings will override all other Tax Flags for the Proposal.

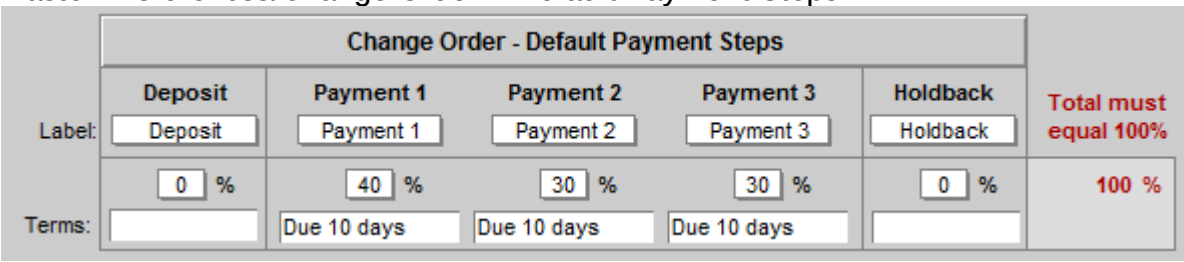


Enhancement – Change Orders: Pending and Final Payments
Both the Pending and Final Change Orders now print with all 5 payments steps and amounts depending on the Payment Plan selected for the Change Order.

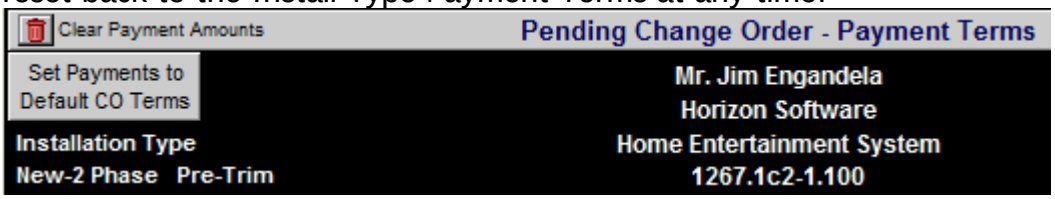
Enhancement – Change Orders: Create Pending CO Payment Option
When creating a Change Order you are now given the Option to use the Master Preferences Payment Terms to the Change Order (regardless of the Install Type) or to use the Payment Terms of the Install Type from the Master Project. The Change Order automatically uses all of the other settings from the Master Project.



Master Preferences/Change Order – Default Payment Steps

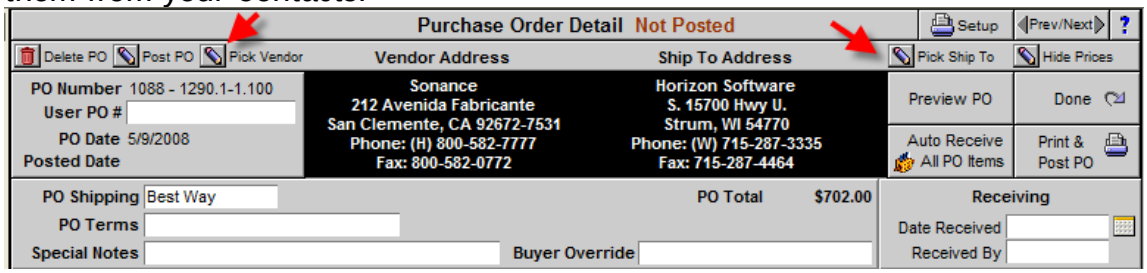


Enhancement – Pending Change Orders: Payment Terms Reset button
You now can set the Payment Terms on a Pending CO to the Master Preferences Default CO Terms and override the Install Type Payment Terms. This can be reset back to the Install Type Payment Terms at any time.

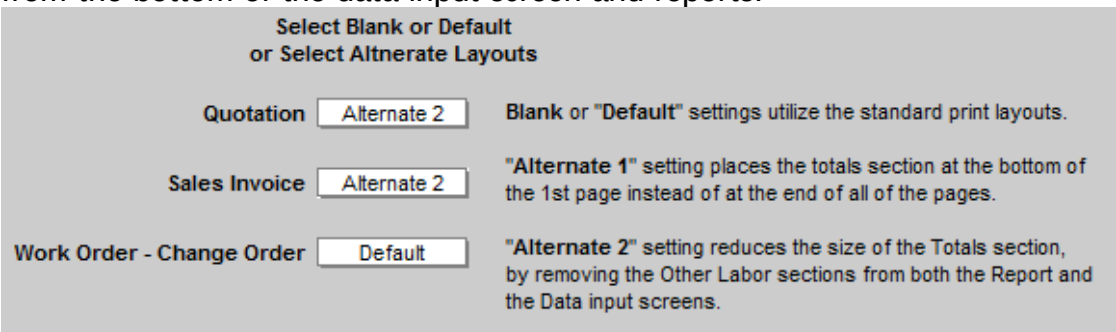


Enhancement – Project / Invoices: Labor & Wire Tax
Labor Tax now is automatically calculated based on the Labor amount added to sales invoices. If users specify tax on individual labor records, the labor tax on invoices is going to be based on a percentage of the entire labor tax on the project.

Enhancement – Project / Purchase Orders / PO Detail: Pick Ship To
Both the regular and Quickbooks PO Detail screens have been enhanced with a Utility bar that enables you to switch the Vendor and Ship To Address by picking them from your Contacts.



Enhancement – POS / Quote & Invoice: Alt 2 condensed totals
Users can now choose an Alternate 2 layout for their POS Quotations and Sales Invoices. This alternate layout removes the Additional and Other labor sections from the bottom of the data input screen and reports.

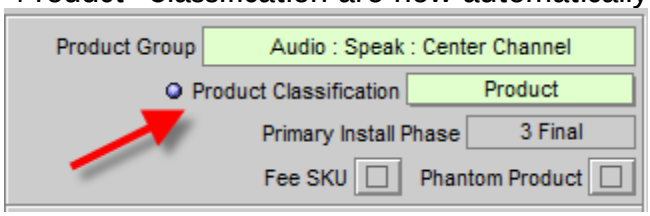


Enhancement – POS / Service & Work Orders: Increase field sizes

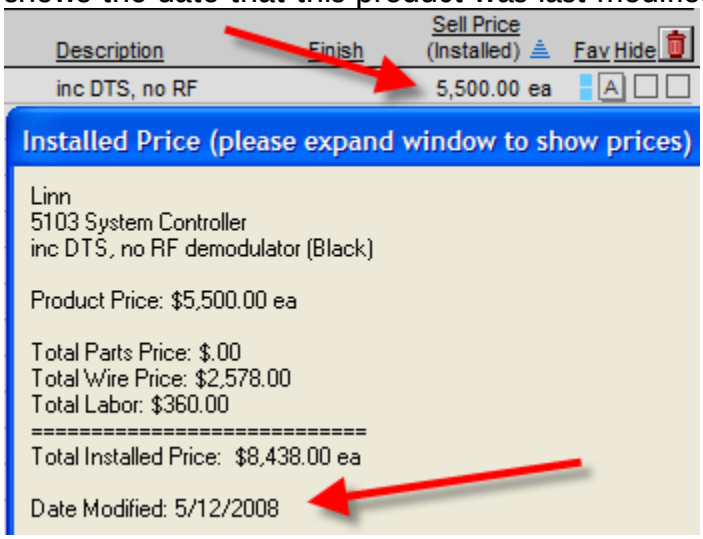
By increasing the size of the data entry fields on the POS Service and Work Order screens and printed forms you can now enter more text such as Site Directions and Work Specified.

Enhancement – POS/Quotations & Sales Invoices: Add Costing Field
Costing fields have been removed from the Quotation and Sales invoices and moved to the Costing screens so that users can create POS invoices in front of customers.

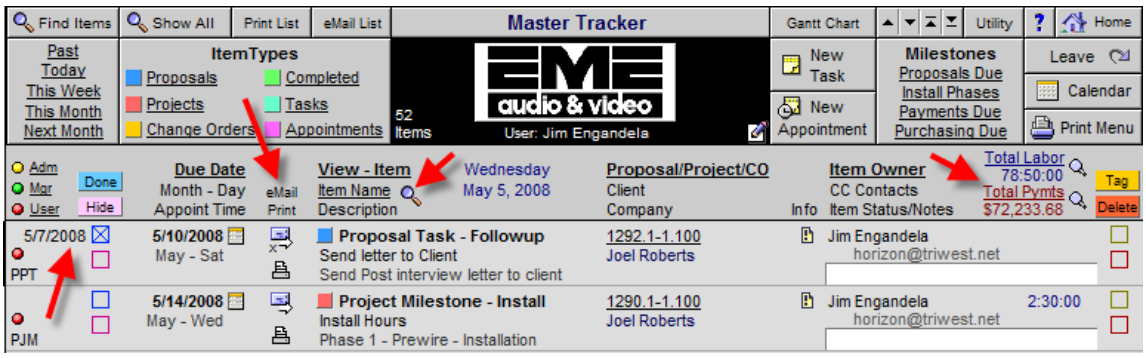
Enhancement – Product Library/Product Detail: Product Class
When changing a Products Classification from a "Product" to a "Part or Wire" the Labor, is now automatically changed from Product Labor Supplement to the Parts/Wire Labor Supplement. The Parts & Wire Supplements attached to the "Product" Classification are now automatically removed.



Enhancement – Product Library/Line List: Installed Price Add Date
When you click on the Sell Price of a Product in the Product Library Line List a pop up window displays the Total Installed Price. This pop up window now also shows the date that this product was last modified.



Enhancement – Master Tracker: Improve Interface
See notes below image



-Add Done Date and Hide checkbox

The Done Date is now displayed on the Tracker screen and a Hide checkbox has been added that enables you to simply hide the item. Both Done and Hidden items can be viewed using the Find Items button and checking Done or Hidden.

-Move eMail & Print buttons

Move eMail and Print buttons next to the Task Item name.

-Add View Item Detail

You can now click directly on the Item, Item name or Item description to View all of the Item Details

-Total Labor and Total Payments buttons

Clicking on the Total Labor or Total Pymts will show all of the Labor or Payment items. Clicking on the View icons next to the Total Labor or Total Pymts will preview Labor & Payment Reports showing each day's Labor & Payments and daily subtotals.

Fix – Master Prefs/Groups: Adding a new Product Group

Adding a new product group no longer displays the previously selected group in the Add Group screen.

Fix – Proposal/Areas & Products: Adding Supplements Select Area

When you leave the Areas & Products screen after selecting an Area, you were prompted to Select an Area when adding a Supplement. This has been corrected.

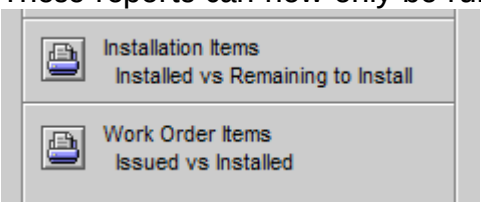
Fix – Proposal/Wire Supplements: Fix deletion of Wire supplements

Wire supplements now properly delete when checked. In addition a pop up notice has been added when deleted Wire and Parts Supplements indicating the Labor for the deleted Wire and Part needs to be manually deleted for Supplements that were added to Proposals prior to 1/1/08. After this date, Labor associated with the Deleted Wire or Part is automatically deleted.

Fix – Project/Change Orders

When Change Orders are created, they now use the Labor Categories and Rates from the Master Project instead of the Master Preferences.

Fix – Project/Print menu/Shop Reports: Install & WO vs Installed
These reports can now only be run if you are in a Project and not in a Proposal.



Fix – Product Library/Product Detail: Fix Fav Field
The Favorite pop up field on this screen now functions the same as the Fav field on the Product Line screen.

Fix – Set Library/Find Sets: Click Done returns to Set List
Using the Find Sets feature and not entering any Find Criteria and clicking Done now returns you to the correct Sets screen and finds all of the Product Sets.

Fix – Master Tracker/Task Owner Email: Fix Owner Address
All email scripts use the Task Owner email address instead of the Salesman's address.

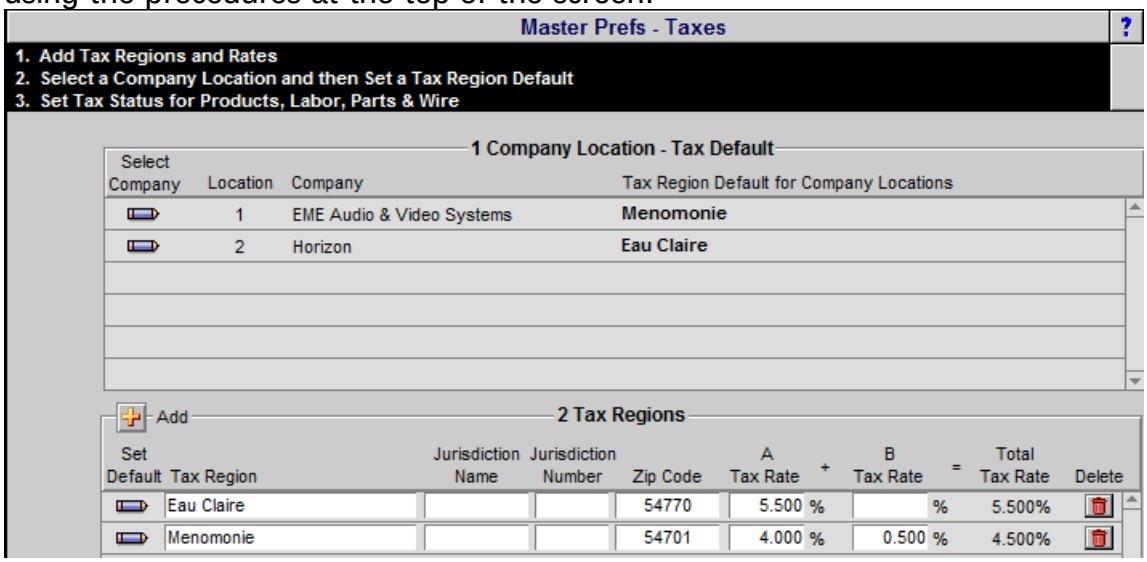
Fix – Change Order: Remove Home buttons to fix Entity Lock
All of the Main Pref Home buttons have been removed from both Pending and Final Change Orders to correct the Entity Lock from engaging on the Master Project.

Fix – Completed Projects: Pricing screens View only
Entering the Pricing screens on a Completed Project allows you to only View the screens and not change any data so that completed projects remain fixed.

SCPS Version 6.6
Includes 6.5v2, v3, v4, v5
Interim Revisions (please view these below)
Released: 3/26/2008

Enhancement – Master Prefs/Tax: Tax Default by Company Location
A Tax Default can now be set for each Company Location. When a User Logs into SCPS the Company Location that he is assigned to will use the Default Tax, for that location, when creating a new Proposal. See the Special Note.

Special Note: After Upgrading, SCPS Administrators should go into the Master Preferences/Tax screen and set the Tax Default for their Company locations using the procedures at the top of the screen.



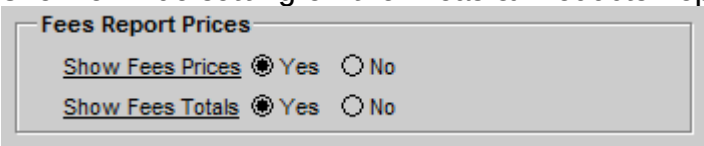
Enhancement – SCPS Screens: Mac Users Screen Size

Mac users now automatically will have their SCPS screens sized to the SCPS screen size instead of their full computer screen. PC users use their full computer screen.

Enhancement – Proposals/Print Options: Fees Pricing

The Proposal Fees report can now be printing with or without individual Fees prices and/or Totals.

You can change this setting within any proposal from the Proposal/Print Menu/Print Options screen. If these are empty your proposal will pick up the Show or Hide setting on the Areas & Products Report Options.

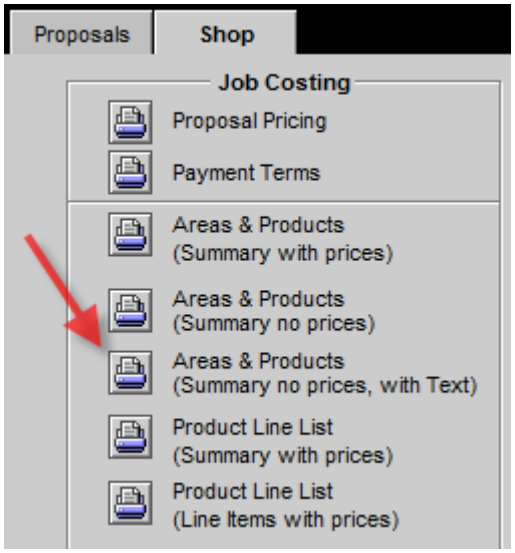


Special Note 1: After Upgrading, SCPS Administrators should go into your Master Preferences/Proposals/Print Options and set your preference. If these are empty your proposal will pick up the Show or Hide setting on the Areas & Products Report Options.

Special Note 2: If you use the Custom Proposal Report module you will need to upgrade it to Report version 6.6 (included in this release) for this feature to work or call Horizon Software to have your Report file modified.

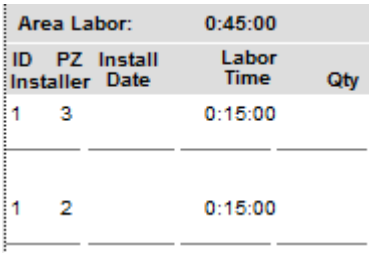
Enhancement – Proposals/Print Menu/Shop: Areas & Products Report with Area Text.

A new Shop Proposal Areas & Products Report that includes Area Text but no Product Prices has been added.



Enhancement – Project Work Orders: Add Area Labor Total

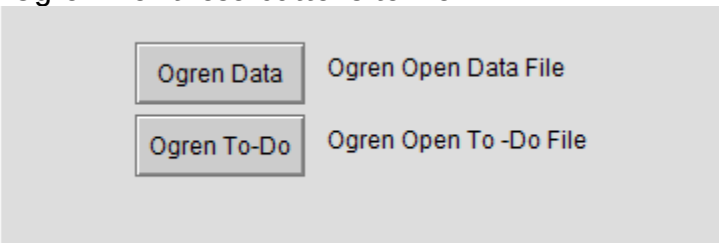
The Total Labor time for each Area on the Work Order is now displayed.



Area Labor:			0:45:00	
ID Installer	PZ	Install Date	Labor Time	Qty
1	3		0:15:00	
1	2		0:15:00	

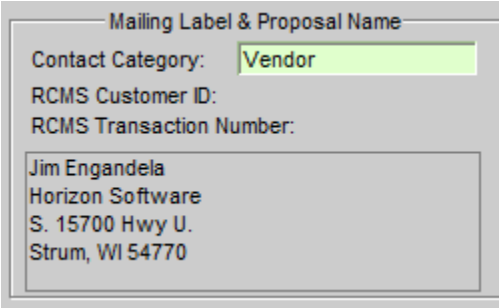
Enhancement – Ogren: Forms screen: Open Data Files

New buttons on the SCPS/Forms screen enables SmartPartner (Ogren) to navigate to their own FileMaker files and return to SCPS. A setting in Preferences/Other/Proposals: Dealer Specific Preferences need to be set to "Ogren" for these buttons to work.



Enhancement – RCMS Users: Proposal/Client info: Contact Category

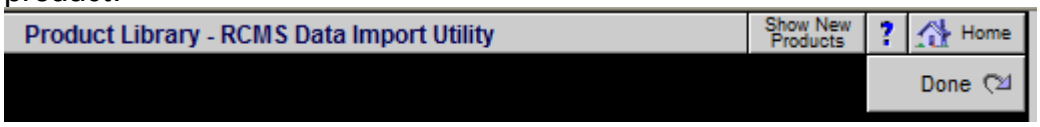
RCMS Users can now Categories their Contact directly from the Proposal/Client info screen when they add a new Contact.



Enhancement – Product Library/Utility/RCMS Import: Update New
All RCMS Product Import Maps now automatically add product descriptions in SCPS if the product is a new product that was not in SCPS prior to the import, even if their import map is set not to update SCPS descriptions with RCMS descriptions.

Enhancement – Product Library/Utility/Definitive RCMS Import
Definitive's import map has now been changed to not update SCPS product descriptions with RCMS product descriptions.

Enhancement – Product Library/Utility/RCMS Show New Products
After importing your RCMS products you can click on the Show New Products button and you will have a list of all of the products that were imported into RCMS that didn't exist before the import. This utility enables you to groom the new products if you wish. This utility is reset each time you import your RCMS product.



Fix – Proposal/Labor Supplements: Deleting Parts & Wire
When you delete a Part or Wire Supplement in the Labor Supplement screen the associated labor supplements for that deleted Part or Wire is also now deleted.

Fix – Product Library/Product Detail: Duplicating Product
When duplicating products the duplicated product retained the qty on hand of the original. This is now cleared on the duplicated product.

SCPS Version 6.5v5
Released: 3/14/2008

Fix – Proposal/Pricing/Labor Rates: Auto Update of Labor Rates
If you go into the Proposal Pricing/Labor Rates screen and change the Labor Rate for that proposal, it was necessary to click on the Labor 1, 2, 3 buttons to update that Proposal. We have now made this update automatic when you leave

this screen to ensure that the update is run. **If you have changed your labor rates in a proposal** and haven't issued the proposal to the customer we recommend that go into the Pricing/Labor Rate screen so that the labor rate update is properly run.

Default ◉ 1 ○ 2 ○ 3

Labor Categories	Hourly Rate 1 Basic Rate		Hourly Rate 2 Inner City Rate		Hourly Rate 3 Prewire only	
	Cost	Sell	Cost	Sell	Cost	Sell
1 - Installation	$30.00	$65.00	$40.00	$80.00	$15.00	$30.00
2 - Programming	$40.00	$80.00	$50.00	$100.00	$15.00	$30.00
3 - Training	$50.00	$100.00	$60.00	$120.00	$15.00	$25.00
4 - Parts Labor	$30.00	$50.00	$30.00	$60.00	$15.00	$25.00
5 - Wire Labor - Bulk	$35.00	$60.00	$35.00	$70.00	$15.00	$25.00
6 - Wire Labor - Precut	$40.00	$60.00	$35.00	$70.00	$15.00	$25.00

Fix – Proposal/Duplicate Areas: Remove Record Pop up message
When duplicating an Area a pop message stating "Add Record" was occurring. This had been removed.

Fix – Proposal/Duplicate Areas: Retain Product Placement Codes
When duplicating an Area the default placement code (m) was being set on the new area/products. Duplicating an Area now retains the user set area/product placement codes.

Fix – Project/Payment Totals: Multiple payment totals
Entering multiple payment amounts for each payment step was not adding up to the Project Total for each payment step. This has been corrected and your legacy data will be correct when you upgrade.

			Master Project Includes Original Project & All CO's	
Master Proj Totals	$3,064.67	$9,194.00	$6,129.34	
- Payments Made	$300.00	$300.00		
Total Balance Due	$2,764.67	$8,894.00	$6,129.34	

SCPS Version 6.5v4
Released: 3/12/2008

Fix – Proposal/Rename Areas: Update Labor, Parts, Wire & Tasks

Renaming a Proposal Area was not updating the Labor, Parts, Wire & Tasks supplements with the new Area Name and this caused them not to be shown in the Supplement portals or added to the Proposal Totals. This has been fixed.

In addition to this fix a routine has been created that will automatically update all of these orphaned supplements in your legacy data. This update occurs automatically during the upgrade process.

Fix – Proposal: Show/Hide Tax
The option to Show or Hide tax on a proposal was not removing the tax label from the printed proposals and it was not removing the tax from the Payment Amounts on the Proposal Contract. This has been corrected.

Fix – Proposal: Fees Total Label
The Fees Total Label that users can create in the Preferences/Proposal/Fees screen was not displaying properly. It now displays if there is a Total Fees Amount and does not display if that amount equals 0.

Fix – Proposal: Areas Subtotal report: Grand Total labels
Each Area in the Areas Subtotal report also used to display the words "Grand Total". These labels were intermittent and redundant so they have been removed.

Fix – POS/All Invoices: Rework invoice layouts for improved printing
POS Invoices: Quotations, Sales, Work Orders, Change Orders were printing random amounts in the header section of the 2nd page of the Invoice. This has turned out to be a FileMaker bug. In order to solve this problem we came up with a work/around that required all POS invoices to be re-built from scratch with a totally different layout structure. This new structure is invisible to users and now these invoices print properly.

Fix – POS/Contact: Client Name and Address
POS Invoices display the Client Name and Address through a relationship back to the Contact data. This relationship had a faulty key value that caused the Client Name to occasionally display improperly, although it could be overridden. This has been corrected so that all of your current legacy contact data will display properly.

Fix – Master Tracker: Filter Tasks by User
The Master Tracker now only shows Tasks for the User that is logged into SCPS and will filter Tasks for Administrators and Managers by using the Adm, Mgr, User buttons on the left side of the Master Tracker screen.

Fix – Proposal: Alpha Finder Updater

The Alpha Finder occasionally was not finding all Proposals and this updater routine automatically runs during the upgrade process to correct this problem.

SCPS Version 6.5v3
Released: 3/04/2008

Fix – Proposal/Print Menu/Areas & Products Report: Showing Product Prices with Labor
When using the Print Option to show Product Labor included in the Product Price the price showing was incorrect. This has been corrected.

Fix – Project/Change Orders: Not posting (neg) amts on Pricing Screen
Change Orders with Negative labor, parts and wires amounts were incorrectly posting to the Change Order Subtotals on the Pricing screen. This has been corrected.

Fix – Project/Change Orders: Not picking up Master Project defaults
When Change Orders are created they now pick up the Master Project defaults instead of using the Master Preferences defaults for: Installation Type, Building Size, Building Type, Number of Floors, Degree of Difficulty, Itemization of bulk wire and Labor Rate Level.

Fix – Project/Change Orders: Picked Products showing in Portal
After Picking Products and returning to the CO screen the Products were not showing in the product portal until you clicked on the Area again. The products were coming into the CO area, just not showing until you refreshed the screen. This has been corrected.

Fix – POS/Sales Invoices: Sell Price into line 48
Picking products into any line below number 48 was putting the sale price of that product into Line 48 as well as the proper line. This has been corrected.

Fix – POS/Contact: Picking the correct Contact for POS creation
The Contact/Utility: Reset Contact Keys, now resets all contact keys (including the record id num set to the record id). This corrects any bad key values due to importing of contacts or old upgrades. This utility now runs during the upgrade process to automatically clean all record ID's.

SCPS Version 6.5v2
Released: 2/27/2008

Fix – Proposal/Print Menu/Contract: Do not Show Tax
Selecting the Do Not Show Tax Option was not removing the Tax from the Contract. This has been fixed.

Fix – Duplicate Project: Do not duplicate PO, SI or WO records
When duplicating a Project it is turned into a Proposal and the associated PO's, SI's and WO's should be removed. They were not being removed and this has been fixed.

SCPS Version 6.5
Released: 2/20/2008

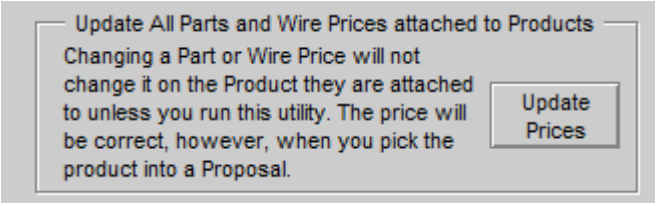
Enhancement – Proposal Fees: Refresh button on Fees Total
Add a Refresh Total button next to the Fees Totals to recalculate the screen after checking or un-checking fees. The Fees Totals automatically refresh when you leave the Fees module so it is not necessary to click this button unless you are on the Fees screen.

Enhancement – Point of Sale: Invoices/Setup: Manual Contact Override
POS Invoices/Quotations/Work Orders etc that have been created in the POS module can now have their primary contact information manually overridden by clicking on the Setup button on the Invoice and making the manual changes to the contact/address fields.

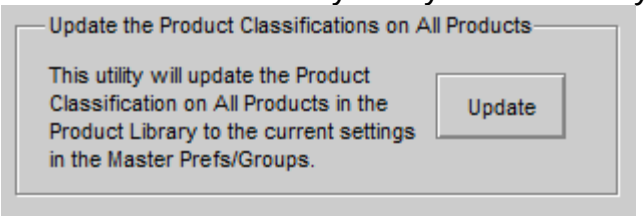
Enhancement – POS/Utility: Reset all POS Invoice tax locations
A utility has been added to reset all of the POS Invoices to the Master Preferences Tax Location. This utility is necessary after importing POS invoices from the Custom Proposal System.

Enhancement – Product Group Portals: Add and Sort by Sort Order
Add Product Classification & Install Phase and Sort Order to all Product Group Portals in Master Preferences and the Product Library.

Enhancement – Product Utility 2: Update All Parts & Wire Prices
A new utility will update All Parts and Wire Supplement Prices attached to Products in your Product Library. This button is on the Product Library/Utility/Product Utility 2 screen.



Enhancement – Product Utility 2: Update All Product Classifications
A new utility will update All Products in your Product Library to the Product Classifications set on each Group in the Master Prefs/Group screen. This button is on the Product Library/Utility/Product Utility 2 screen.



Fix – Master Prefs/Wire/Wire Lengths: Update Prefs not Proposal Wire.
Changing the Master Prefs/Bulk wire length default was changing the wire length in existing Proposals & Projects. All master prefs are not supposed to change existing Proposals & Projects and this has been fixed. Changing the Master Prefs default wire lengths does change the wires supplements attached to products in the product library and this is how it should be. A utility has been created to reset Proposal and Project wire lengths if they have been inadvertently changed. Please contact Horizon if necessary.

Fix – Proposal Fees: Fix Fees Total when Directing Fees to Parts Subtotal
The Total Fees amount was not removing the Fee amount from the Total Fees Amount when that Fee was being Directed to the Parts Totals.

Fix – Proposal Fees: Clean Fees Check Box's during Upgrade routine
Some users had Fees Check Boxes (that select which fees are to be added into a proposal) with bad data in them. They are all groomed and cleaned during the upgrade process.

Fix – Proposal/Print Menu: Printing Areas & Products without Text
When choosing the Print Option to not show Area Text a white mark was covering part of the Area name. This has been corrected.

Fix – Proposal/Services Fees: Direct to Labor tax
Service Fees directed to the Labor subtotal in a Proposal were not getting taxed properly and this has been fixed.

Fix – Proposal/Project: Staple Up Cards/Wire Supplements

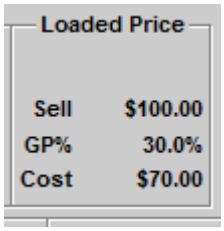
If your Wire preference was set to not itemize Wire records then Wire Supplements added to a proposal were not being stamped with their wire classification and were not showing up on the Shop/Staple Up Cards. This has been corrected for new and existing wire supplement records.

Fix – Project/Change Orders/Add Supplements: Add Disciplines
Adding Labor Supplements to an Area now asks you to assign a Discipline to the Labor Supplement when adding it from the Labor Supplement screen and not from the CO Portal screen. The added Labor Supplement now also shows up in the Labor Supplement screen portal when you return to the Portal screen.

Fix – Completed & Archived Proposals: Show all in list view
Under some circumstances entering the Completed or Archived Proposal lists did not show all of the Proposals. This has been corrected.

Fix – POS: Leaving the POS module do not post amounts
When leaving the POS module using the Home button the invoice amounts no longer post making exiting the POS much faster.

Fix – Product Library: Loaded Price GP%
Recalculate the GP% field.



Fix – Re-lookup Supplemental Parts prices utility.
A utility for relooking up parts prices has been created for users that have lost their supplemental parts prices during an upgrade due to file corruption. Please contact Horizon if necessary.

SCPS Version 6.4
Released: 1/17/2008

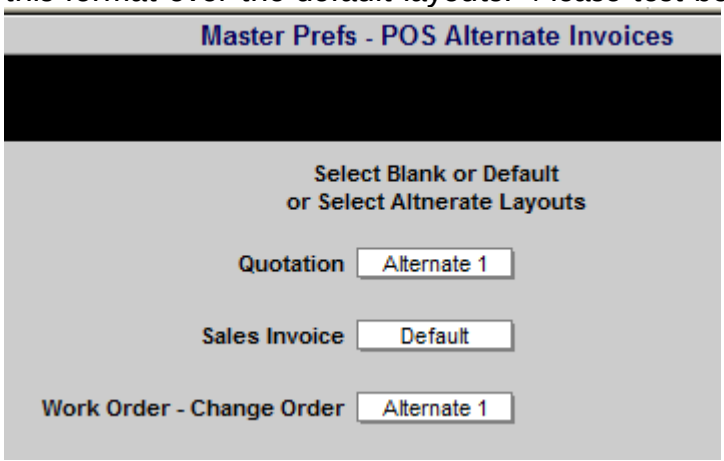
Enhancement – Point of Sale: Faster exit upon leaving POS
We no longer post invoice amounts to the line list when exiting the POS module and this stops all of the summarizing field delays. Doing this makes exiting the POS much faster.

Enhancement – Point of Sale: All Invoices: Contact Phone Numbers

Contact phone numbers on all POS invoices now come directly from the Contact Library so that they will be automatically updated on the POS invoices when they are updated in the Contact Library.

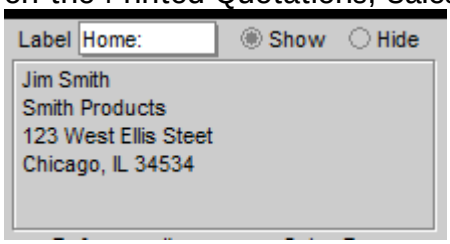
Enhancement – Point of Sale: Alternate Print Layout formats for Quotations, Sales Invoices, Change Orders and Work Orders
You can now select Default or Alternate POS Print layouts from the Master Prefs/POS/Alternate screen.

The Alternate 1 setting places the totals section at the bottom of the 1st page, instead of at the end of all of the pages of these POS invoices. You may prefer this format over the default layouts. Please test both styles.



Enhancement – Point of Sale/Service Orders: Extend Description of Problem field.
If you are going to print using the 3 page Service Order, instead of the single page Service Order, you can now type in about 30% more text into this field and extend beyond the displayed field border.

Enhancement – Point of Sale: Hide 2nd address Label
If the 2nd address label is empty, the address label will be automatically hidden on the Printed Quotations, Sales Invoices, Work Orders etc.



Fix – Proposal/Areas & Products: Pick Products Routine
Under some conditions picking products or product sets into an area on a proposal would place those products in the wrong area and/or return you to another Proposal. This has been corrected.

Fix – Proposal/Client Info: Switch Contact in new proposals
Under some conditions…If you created a new proposal and clicked Cancel in the add/pick contact screen you could not switch to another contact. This has been corrected.

Fix – Project/Pending Change Order: Add Supplements Navigation
When adding a Pure Supplement to a Pending Change order and clicking on the Done button you were returned to the Proposal Areas & Products screen instead of the Change Order Areas & Products screen. This has been corrected.

Fix – Project/Work Order: Total Project Time & Remaining Time
Post the correct Project and Remaining Time on the WO when entering the WO module and leaving the WO Invoice screen.

Labor Time Remaining on Project	
Project Time	15:20:00
Installed Time	3:00:00
Labor Time Left	12:20:00

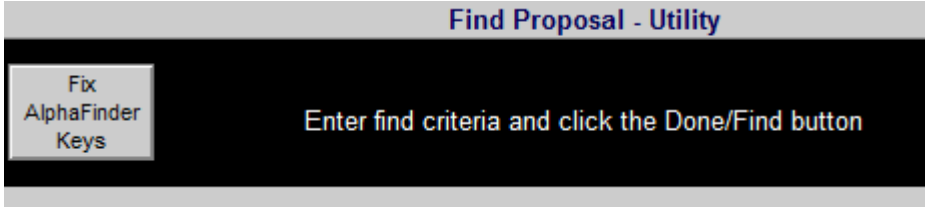
Fix – Project/Work Order: Parts Summing Routine
When entering the Project/Work Order screen the summing routine that adds like kind item quantities together was excluding some Parts. This also caused the WO Hours Total to be incorrect when adding all Products, Parts and Wire to the Work Order.

SCPS Version 6.3v2
Released: 1/10/2008

Enhancement – POS Invoices: Change Body part to Sub Summary
Changing the totals section on POS Quotations, Invoices and Work Orders from a Body part to a Sub Summary part prevents the totals section from being split across page breaks and this improves the printing quality.

Fix – POS Invoice Layouts: Replace damaged layout field
A damaged Filemaker field has been found on the POS layouts. With some user data... the POS Invoice, Quotation and Work Order can freeze FileMaker when previewing or printing. This has been corrected.

Fix – Proposal/Project AlphaFinder: Repost clients name
In Proposals was possible to use the Home button on the Client screen and this was not allowing the clients name to be updated in the Alpha Finder. When you upgrade to this version all of your clients names will be updated automatically. You can also manually update the names using the Fix AlphaFinder Keys button in the Find Proposal – Utility as well.



SCPS Version 6.3v1
Released: 1/7/2008

Enhancement – System Wide/Home Button Speed Improvement
Improve the speed of SCPS navigation by switching all files to their Fast Open screen when using the Home button in all modules.

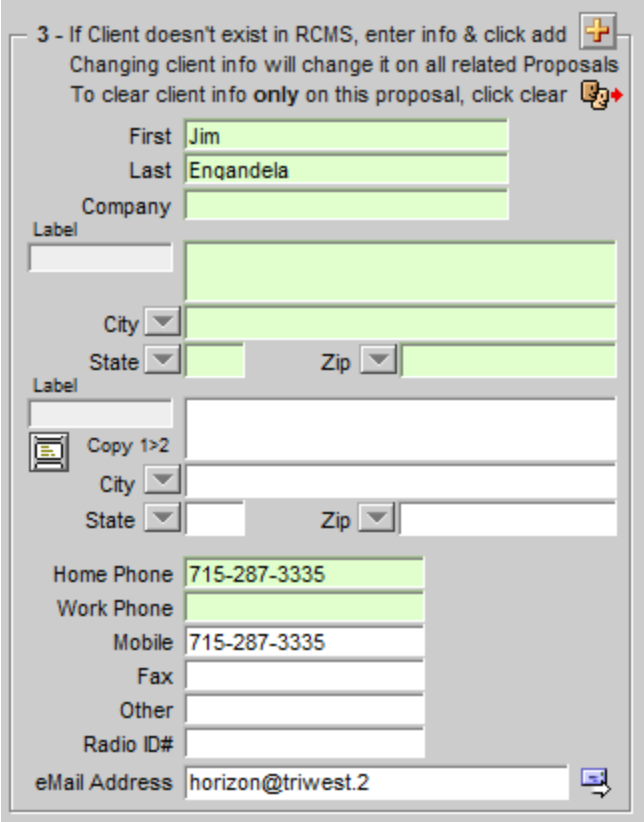
Enhancement – Proposal/Parts & Wire Supplement Labor
Changing the Qty or Deleting Parts and Wire Supplements in a Proposal now **automatically** adjusts the Labor time and amounts of the Labor on the Products associated with those Supplements.

Enhancement – Proposal: Adding Disciplines to Pure Supplements
Adding a Pure Supplement to an Area now prompts you to assign a Discipline to the Pure Supplement. Pure Supplements automatically have phases and areas and now will have Disciplines so that your Job Costing is accurate by Discipline as well.

Enhancement – Proposal/Areas & Products Reports: Align all fields
Set all report fields to Single Line formatting to improve printing accuracy.

Enhancement – Proposal/Contract: Extra blank page
Adjust the header size so that more info can be placed on the contract making it less likely to add an additional semi-blank page to the contract.

Enhancement – RCMS – Proposal/Contact: Add Email Field
Add an eMail address field and a send email button to this screen.
Move the clear client info button to the top of this section for easier use.



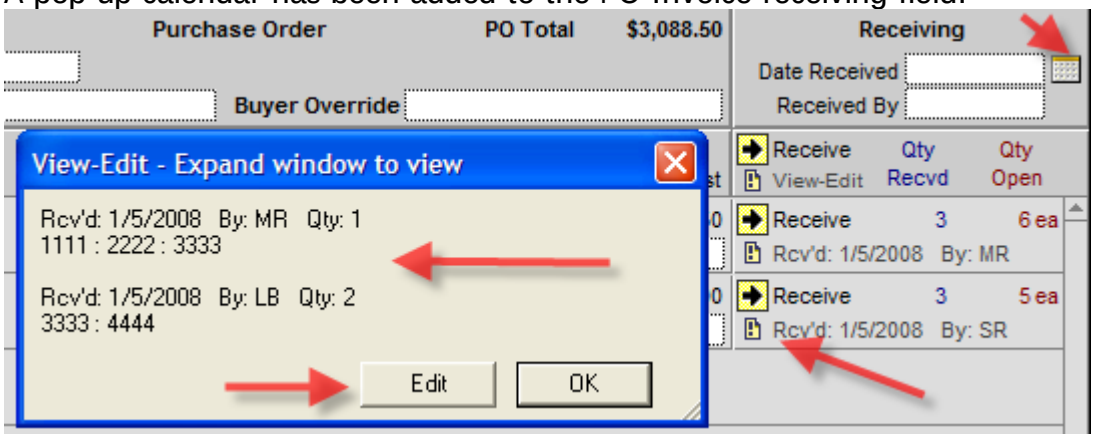
Enhancement – Project Purchase Orders: Serial numbers

New PO Invoice Receiving mechanism that records a log of serial numbers each time you receive a qty on a PO item.

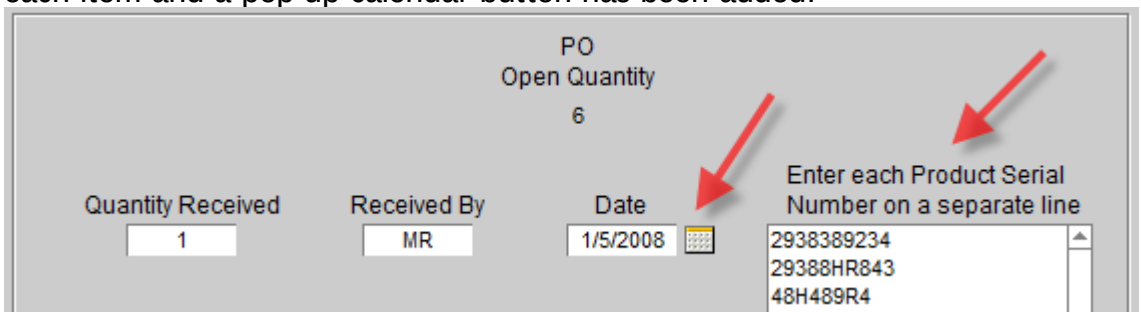
These serial numbers can be Viewed by clicking on the View button on each item.

Serial numbers can also now be edited by clicking on the Edit button in the View window.

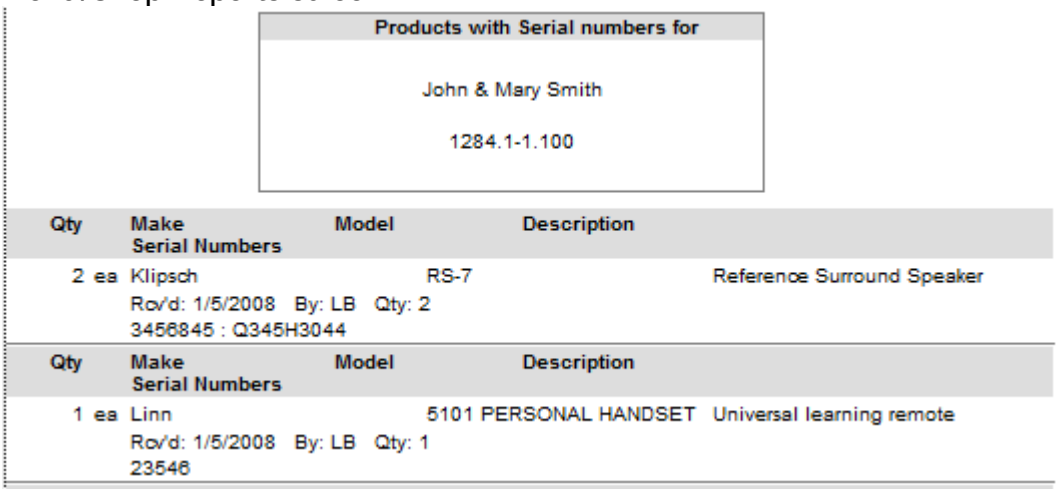
A pop up calendar has been added to the PO Invoice receiving field.



A new PO item Receiving screen enables you to enter multiple serial numbers for each item and a pop up calendar button has been added.



A report of all of the products in the Project with serial numbers has been added to the PO Utility screen. This report is also available in the Project/Print Menu/Shop Reports screen.

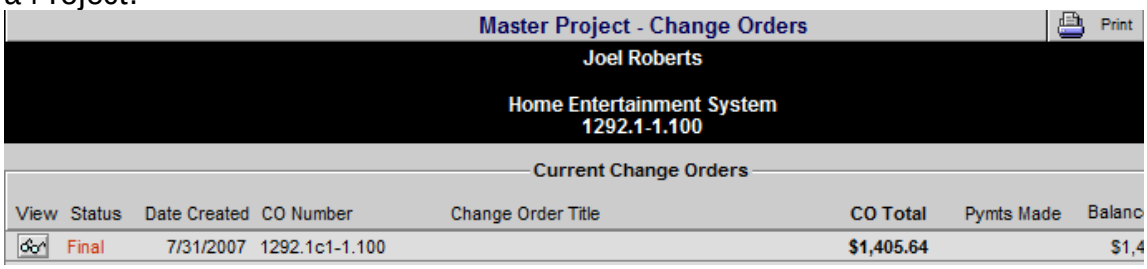


Enhancement – Project/Pricing/Tax Summary: Print button

Add a Print button to the Pending and Finalized CO Tax Summary screen, that prints a report of the Tax on a Proposal.

Enhancement – Project/Change Orders/CO List: Print button

Add a Print button to the Change Order List screen to print a report of all CO's in a Project.



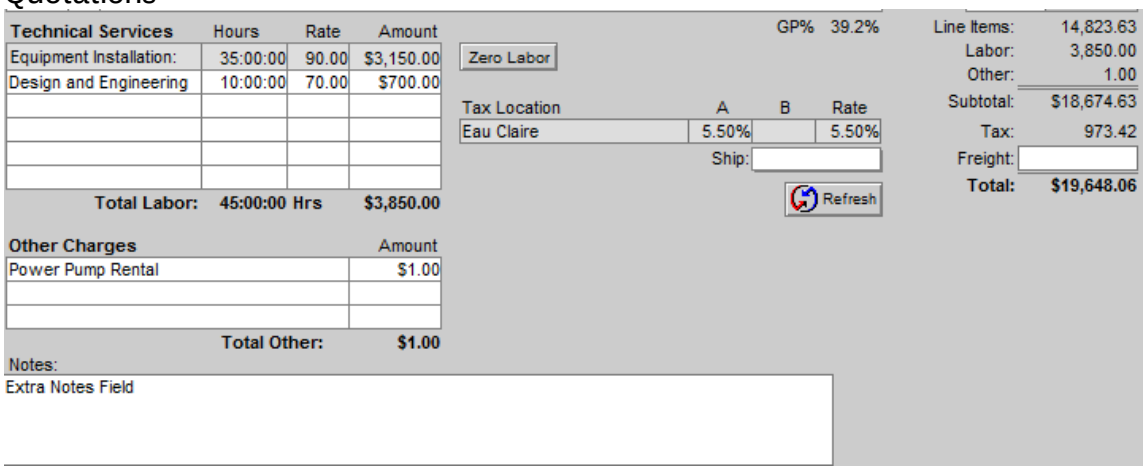
Enhancement – Project/PO's, SI's, WO's: Speed Improvement
Speed up entering PO's , SI's and WO's by switching to the Fast Open screen during the Sum Items process.

Enhancement – Project/Shop: Serial Numbers
Change Serial number entry field in the Sales Invoice and PO to a display field instead of a scroll field so that all serial numbers can be viewed when you click in the field.

-Report: Increase field size to accommodate more serial numbers and convert carriage returns between serial numbers to " : " so that serial number will be printed in succession instead of vertically thus saving space.

Enhancement – POS Invoices
Improve the footer section of Quotations, Sales Invoices and Work orders for more clarity and consistency.

Quotations



Technical Services	Hours	Rate	Amount
Equipment Installation:	35:00:00	90.00	$3,150.00
Design and Engineering	10:00:00	70.00	$700.00
Total Labor:	45:00:00 Hrs		$3,850.00

Other Charges	Amount
Power Pump Rental	$1.00
Total Other:	$1.00

Notes:
Extra Notes Field

Zero Labor

Tax Location	A	B	Rate
Eau Claire	5.50%		5.50%

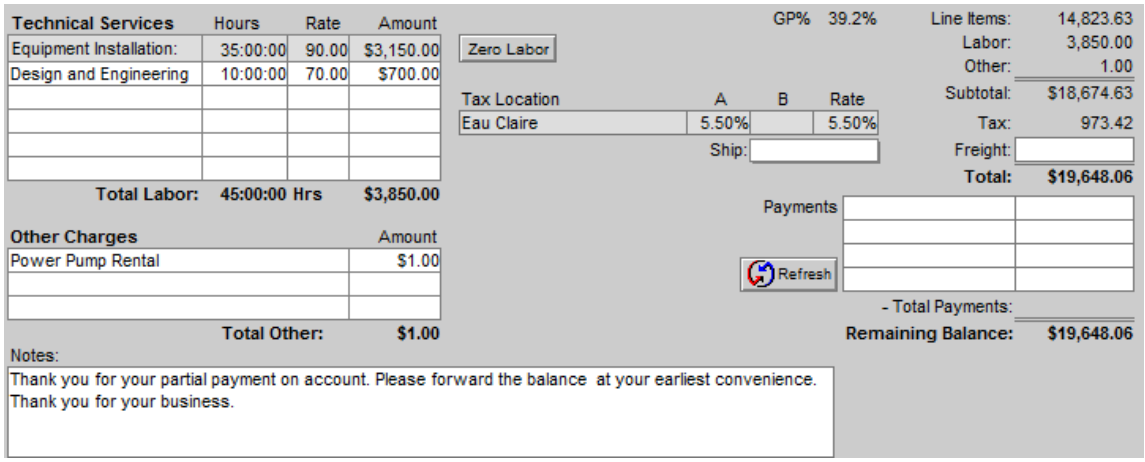
Ship:

Refresh

GP% 39.2%

Line Items:	14,823.63
Labor:	3,850.00
Other:	1.00
Subtotal:	$18,674.63
Tax:	973.42
Freight:	
Total:	$19,648.06

Sales Invoices



Technical Services	Hours	Rate	Amount
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Total Labor:	45:00:00 Hrs		$3,850.00

Other Charges	Amount
Power Pump Rental	$1.00
Total Other:	$1.00

Notes:
Thank you for your partial payment on account. Please forward the balance at your earliest convenience.
Thank you for your business.

Zero Labor

Tax Location	A	B	Rate
Eau Claire	5.50%		5.50%

Ship:

Refresh

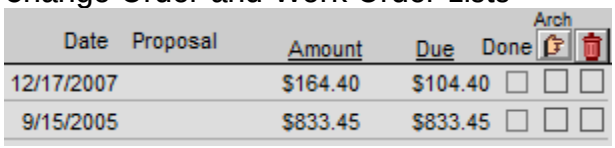
GP% 39.2%

Line Items:	14,823.63
Labor:	3,850.00
Other:	1.00
Subtotal:	$18,674.63
Tax:	973.42
Freight:	
Total:	$19,648.06

Payments

- Total Payments:	
Remaining Balance:	$19,648.06

POS: Display Total Amount and Amount Due on Quotation, Sales Invoice, Change Order and Work Order Lists

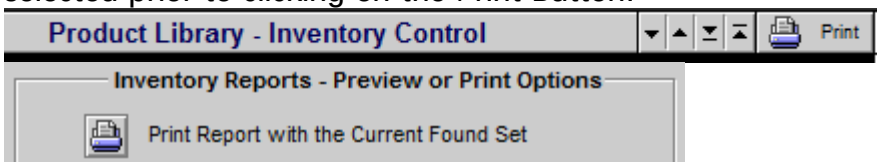


POS/Utility: This utility will repost Total Amounts and Total Due Amounts on all POS records. This utility will run when upgrading as well.

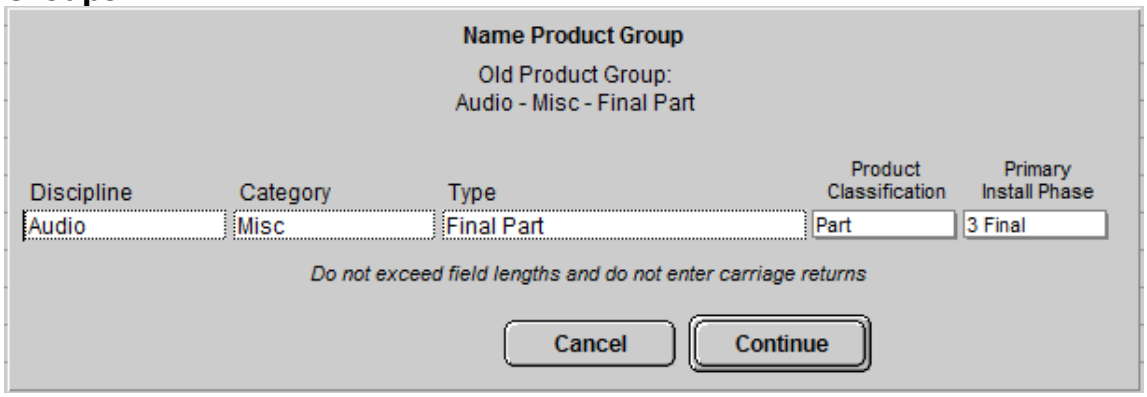
POS/Quotation: You are now allowed to only convert a Quotation into a Sales Invoice one time. If for some reason you want to repeat this process, click on the Setup button and remove the #1 in the Converted Quotation into a Sales Invoice flag.

Enhancement – Product Library/Inventory Control/Print Option

Add a new print button that prints the Inventory Report with only the Products selected prior to clicking on the Print Button.

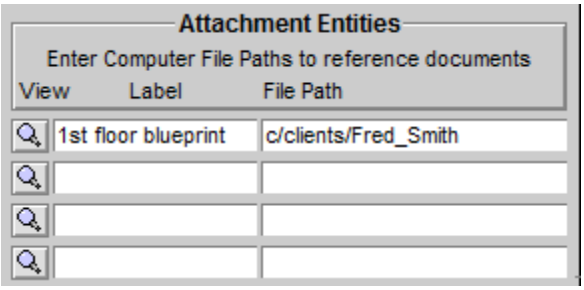


Enhancement – Master Prefs/Groups: Add Class & Phase to Change Groups

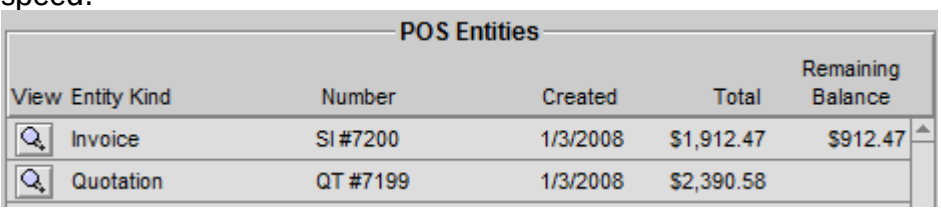


Enhancement – Contact/Contact Detail/Entities: Add Labels

File Attachment Labels have been added to all 10 Attachment links.



Enhancement – Contact/Entities/POS: Invoice Totals
Make the Total of the POS Entity now reflect the Grand Total and Remaining Balance of any POS Entities. These are now also posted values for improved speed.



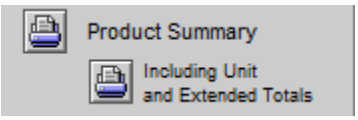
Enhancement – Product Library/Utility/RCMS Import: Sound Room
A new RCMS Import map for The Sound Room has been added that takes the RCMS list price and places it into the SCPS Sell Price and the RCMS Sell Price and places it into the SCPS Minimum Sell Price.

Fix – Proposal/Project Alpha Finder:
Under certain conditions the Alpha Finder was not finding all entities with certain characters. This has been corrected.

Fix – Proposal/Areas & Product: Duplicating Areas with Pure Supplements
Duplicating an Area that contains a Pure Supplement now duplicates the Pure Supplement

Fix – Proposal/Areas & Product: Adding a Product after a Pure Supp
If you first add pure supplements to an area and then add a product (with supplements) those supplements do not show up in the supplements screens even though they add into the proposal properly. This has been fixed.

Fix – Proposal/Print Menu/Product Summary with Totals
The extended total on this report has been changed to a summary field so that it displays the proper amount under all conditions. This field has been changed on the Reports (v6.3) file as well. Users of the current Proposal Reports file can call Horizon for an online modification.



Fix – Proposal/Area & Products/Deleting Pure Supplements
After deleting a Pure Supplement you can now add another Pure Supplement. This was not possible before if the deleted supplement was the 1st one in that Area.

Fix – Proposal/Client: Switch or Modify Contact
We are now clearing the Add new contact flag in Contact when clicking the Switch or Modify button to insure that this routine will work even if this flag was improperly not cleared.

Fix – Proposal/Product Detail/Wire Labor: No Labor Switch
The No Labor switch now correctly removes Wire Labor when checked on each Wire in the Wire Portal.

Fix – Proposal/Areas & Products: Pick Products-Wire Supplements
Pre-Cut Wire Labor properly comes into the Proposal in all conditions.

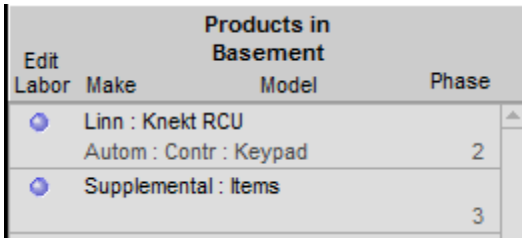
Fix – Proposal/Changing Qty on Parts & Wire Supplements
Qty fields on Parts & Labor Supplements have been changed to pop up fields so that changing Parts & Wire Qty also changes the Labor time attached to them.

Upgrade routine now sets the Labor Keys on Parts & Wire records on legacy data so that Labor Time can change when Parts & Wire Qty is changed.

Fix – Proposal/Changing Labor Degree of Difficulty
Changing the Labor Degree of Difficulty now properly changes the Parts & Wire Labor time based on the DOD.

Fix – Proposal/Parts & Wire Labor Detail screen: Labor Time
The Labor Time shown at the bottom of the Portals now shows the actual labor time and not an estimate of the labor time.

Fix – Proposal/Product Detail/Supplements: Edit Supplement Labor
Clicking on the Edit button on a Product enables you to edit the Labor but not on a Supplemental Item which should be edited from the Pure Labor Supplement portal on this screen.

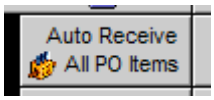


Fix – Proposal / Areas & Products / Pure Supplements: Done Button
Done button on the Labor/Parts/Wire Pure Supplements screen now returns you to the Area & Products screen, with that Area selected.

Fix – Proposal / Proposal Detail / Discipline Sub / Grand Total: Delete Disc
When entering the Discipline by Sub or Grand total screens, Disciplines that have no Products or Supplements are now automatically deleted.

Fix – Project / Work Orders / Work Order report: Wire Supplement Areas
WO Report: Wire Supplements added to a Work Order were showing in their own areas instead of combined with Product Areas. This was created 2 areas with the same name in the Work Order instead of 1. This has been corrected for new WO orders and for legacy WO's.

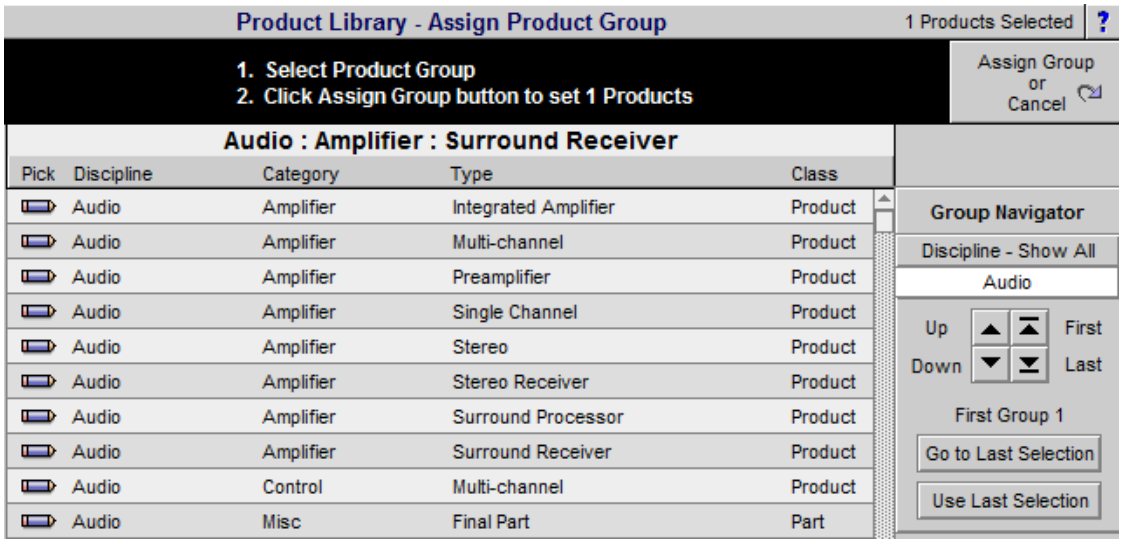
Fix – Project / PO / PO Detail: Auto Set All Received Products
Using the Auto Set Received Quantities button now only affects that PO and not all PO's.



Fix – POS: Invoices: Amount Due
When an entry was made in the Other section of a POS invoice the Amount Due field displayed an incorrect amount. This has been corrected.

Fix – POS: Invoices: A & B Combined Tax
If some instances A & B tax was not adding together correctly. This has been fixed.

Fix – Product Library / Utility / Assign Groups to Many Products
Fix Group Assignment portal and group navigator so that clicking on a Group assigns that Group to the Selected Products.



Fix – Master Tracker/Gantt Chart: Chart Bar lengths
The Gantt Chart now properly displays the length of each installation phase.

Fix – Contact/Upgrade User Favorites
An obscure file condition was causing User Favorites in the Contact file not to be retained during the Upgrade process. This has been corrected.

Fix – RCMS Product Import for Sound Components and Absolute Sound
Under certain conditions the setting that retained current product descriptions so they are not overwritten by the new RCMS descriptions was failing. This has been corrected.