



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,
Jim Engandela
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.

Entity Utility Replace Data Product Library - Specifications 12 of 30 ? Home

Created: 1/8/2002
Modified: 12/23/2008
By: Jim Engandela
Product ID 3468

Linn
CLASSIK MOVIE DI
Audio : Amplifier : Surround Receiver

Done Return to List
Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

Product Library - Products in Entities 12 of 30 ? Home

Created: 1/8/2002
Modified: 12/23/2008
By: Jim Engandela
Product ID 3468

Linn
CLASSIK MOVIE DI
Audio : Amplifier : Surround Receiver

Done Return to List
Prev Next

Find All Products in Entities

Entities
Proposals
Projects
Completed
Archives
Change Orders

Entities	
Proposal	1267.1-1.100
Proposal	1267.1-1.100
Proposal	1269.1-1.100
Proposal	1269.1-1.100
Project	1284.1-1.100
Project	1284.1-1.100

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

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

Enter text and stay within border>

Show Salesman's ☒ Yes
Name & Title ☐ No

Update All Existing Proposals and Projects

Global Cover Page Pictures
Copy & Paste Images >

Prepared By

Prepared By
Salesmans Name
Salesmans Title

EME Audio & Video Systems 2950 Mall Drive Eau Claire WI 54701
Phone: 715-287-3335 Fax: 715-287-4464 horizon@trivest.net
Proposal: 1098.1-1.30 June 12, 2002

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 Readability: 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.

Find Products										Fav A B C										Product Library - Line List																		Utility				? Home											
All		A		B		C		D		E		F		G		H		I		J		K		L		M		N		O		P		Q		R		S		T		U		V		W		X		Y		Z	
Show Products				Add New Product				<div>EME audio & video</div>																				Other Views		Inventory Control		Leave																					
Show Parts				Phan		Lab																						Auto Tag		Product Sets																							
Bulk		PreCut		345 of 451 Items																												Part		Wire		Show Hidden		Print Menu															
Show All Groups																																																					
Displin		Cat		Type		Class View		Make		Model : SKU		Description		Finish		Notes		Sell Price (Installed)		Fav		Hide																															
Audio		Multi		Switcher		Creston		AADS		Adagio Audio		Black		2,500.00 ea																																							
Audio		Multi		Switcher		Creston		AADS-XM		Adagio Audio		Black		2,900.00 ea																																							
Audio		Multi		Switcher		Creston		AAE		Adagio Audio Expander		Black		1,800.00 ea																																							
Autom		Contr		Keypad		Creston		C2N-DB12_		Decorator Keypad 12		Specify		260.00 ea																																							
Autom		Contr		Keypad		Creston		C2N-DB6		Decorator Keypad 6		Specify		260.00 ea																																							

Find Products Replace Data **Product Library - Product Detail** 1 of 345 ? Home

Duplicate Product
 Delete Product

New Product

Crestron
AADS
 Adagio Audio Distribution System
 Audio : Multi-room : Switcher

Done Return to List
 Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

Make **Crestron**
 Unique Model **AADS**
 SKU
 Finish **Black**

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

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).

Master Prefs - Labor Sub Category - Lists ? Home

Labor Supplements Labor Categories Labor Rates Labor DOD Done

Labor Categories
 1 - Installation
 2 - Programming
 3 - Training
 4 - Parts Labor
 5 - Wire Labor - Bulk
 6 - Wire Labor - Precut

Update Labor Categories
 After changing Labor Categories click this button to Update the Labor Categories on All Product Groups in your Product Library

☒ **Enable Sub Categories**
Labor Sub Categories Value Lists
 Installation Labor Category 1
 Programming Labor Category 2
 Training Labor Category 3

Groups	Labor	Parts	Wire	Tasks	Master Prefs - Labor Supplements			Print	?	Home						
Labor Supplements					Select a Product Group Add Categories and Labor Time					Done						
<p align="center">Labor Time for Groups classified as "Product"</p> <div> <div> Primary Install Phase 3 Final </div> <div> Audio - Amplifier - Integrated Amplifier <div> Prev Next </div> </div> </div> <div> <div>Labor Sub Categories</div> <div> Labor Time is formatted in Hours:Minutes:Seconds. Enter a maximum of 60 minutes & seconds </div> </div>																
<div> <div> <div>+</div> Add </div> <div> <div>Labor Categories</div> <div>Labor Rate</div> <div>1 Prewire</div> <div>2 Trim</div> <div>3 Final</div> </div> </div>																
<table border="1"> <tr> <td>1 - Installation</td> <td>\$60.00</td> <td>0:00:00</td> <td>0:00:00</td> <td>0:30:00</td> <td></td> </tr> </table>											1 - Installation	\$60.00	0:00:00	0:00:00	0:30:00	
1 - Installation	\$60.00	0:00:00	0:00:00	0:30:00												

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 <input type="checkbox"/> Empty = "Global" Fav's		Proposal No "Add Product" Prompt <input type="checkbox"/>		Jim Engandela President <small>Checked boxes have Access Rights Unchecked boxes do not have Rights</small>		Screen Magnification <input type="text"/> <small>Re-Login to set the size of the SCPS screen</small>
				Done		Commissions

Module/Screen Access <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Preferences <input checked="" type="checkbox"/> Project Manager <input checked="" type="checkbox"/> All Utility screens Except Proposals/Projects <input checked="" type="checkbox"/> Proposal & Project Utility Access to Admin Utility <input checked="" type="checkbox"/> Modify Proposal & Project Salesman's Commissions <input checked="" type="checkbox"/> Proposal Custom Print Layouts <input checked="" type="checkbox"/> CPS Custom Proposal System Proposal & Change Orders <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Archive <input checked="" type="checkbox"/> Add Supplements <input checked="" type="checkbox"/> Delete Supplements <input checked="" type="checkbox"/> Add New Tax Codes <div style="border-top: 1px solid black; padding-top: 5px;"> Edit <ul style="list-style-type: none"> <input checked="" type="checkbox"/> List Price <input checked="" type="checkbox"/> Min Sell Price <input checked="" type="checkbox"/> Sell <input checked="" type="checkbox"/> Cost <input checked="" type="checkbox"/> Pricing - Global Price Adjuster <input checked="" type="checkbox"/> Pricing - Global Min Sell Adjuster <input checked="" type="checkbox"/> Pricing - Hourly Labor Rates </div>	Group Filter Assignment <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Administrator <small>Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects</small> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Proposals - Projects - Completed Archives - Change Orders <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Convert Proposals - Projects <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Convert (Sell/UnSell, Complete) </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Archived Proposals <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Restore </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Text Library <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate <div style="border-top: 1px solid black; padding-top: 5px;"> Edit <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Text Fields </div> </div> <div style="border: 1px solid black; padding: 5px;"> Info Library <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Delete <div style="border-top: 1px solid black; padding-top: 5px;"> Edit </div> </div>	Contacts <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Delete Point of Sale <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Delete/Archive Invoices <div style="border-top: 1px solid black; padding-top: 5px;"> Edit <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Sell Price </div> Product Library <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate <small>Including Labor, Parts, Wire Supplements</small> <div style="border-top: 1px solid black; padding-top: 5px;"> Edit <ul style="list-style-type: none"> <input checked="" type="checkbox"/> List Price <input checked="" type="checkbox"/> Min Sell Price <input checked="" type="checkbox"/> Sell <input checked="" type="checkbox"/> Cost <input checked="" type="checkbox"/> Class, Groups & Phase <input checked="" type="checkbox"/> Labor Sub Groups <input checked="" type="checkbox"/> Price Adjusters <input checked="" type="checkbox"/> Do Not Discount (All Products) <input checked="" type="checkbox"/> Product Detail Fields <input checked="" type="checkbox"/> Specifications Fields <input checked="" type="checkbox"/> Inventory Control Module </div>
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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 ☐

Override Labor

Audio : Multi-room : Switcher

Classification: Product
Primary Install Phase: 2 Trim

Labor Categories		Hourly Labor Rate	Override Labor Time (hrs:min:sec)			Reset All Labor to Group Assigned Labor
Add	Labor Sub Categories		Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	
	1 - Installation	\$60.00	0:00:00	0:30:00	0:15:00	

DOD = 1

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.

Master Prefs - Other - Proposals

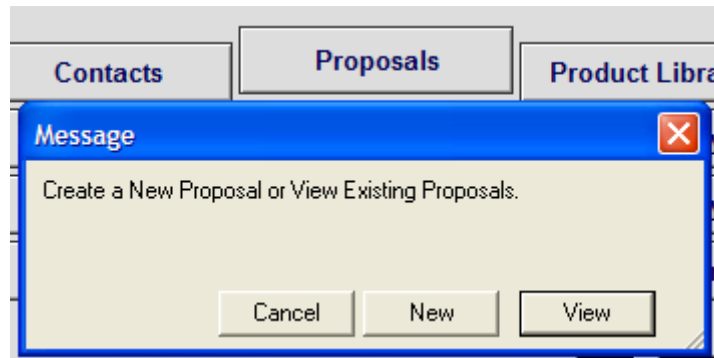
Proposals	Projects	Products 1	Products 2	Counters	Misc	3rd Party	Graphics
------------------	----------	------------	------------	----------	------	-----------	----------

Proposal/Project/Completed/Archive Lists

No Proposal New/View Option ☒

Sort Proposals & Projects ☐

Proposal & Project Sort Order Descending Order



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.

 A screenshot of the 'User Access Rights' screen for a user named 'Jim Engandela', President. The screen has a header with 'Check All' and 'Uncheck All' buttons. Below the header, there are two columns: 'User Assignable Favorites' with an unchecked checkbox and the text 'Empty = "Global" Fav's', and 'Proposal No "Add Product" Prompt' with an unchecked checkbox. The main area is divided into two sections: 'Module/Screen Access' and 'Group Filter Assignment'. The 'Module/Screen Access' section has a list of items with checkboxes: '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' (highlighted with a red arrow), and 'CPS Custom Proposal System'. The 'Group Filter Assignment' section has a dropdown menu set to 'Administrator' and text explaining that administrators see all proposals and projects, managers see their own, and users only see theirs. Below this, there is a section for 'Proposals - Projects - Completed Archives - Change Orders' with checkboxes for 'Delete' and 'Duplicate'.

 A screenshot of the 'Print Options' dialog box. It has a title bar and several input fields: 'Proposal Status' (a text box), 'User Print Cue' (a text box), 'Report Date' (a date picker set to 11/8/2008 with a 'Date Lock' checkbox), and 'Print Dialog' (a checkbox labeled 'Show when printing'). At the bottom, there is a checkbox for 'User Custom Print Layouts' which is checked, and the text 'User Custom Layouts v7.1' is displayed below it. A red arrow points to the 'User Custom Print Layouts' checkbox.

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)

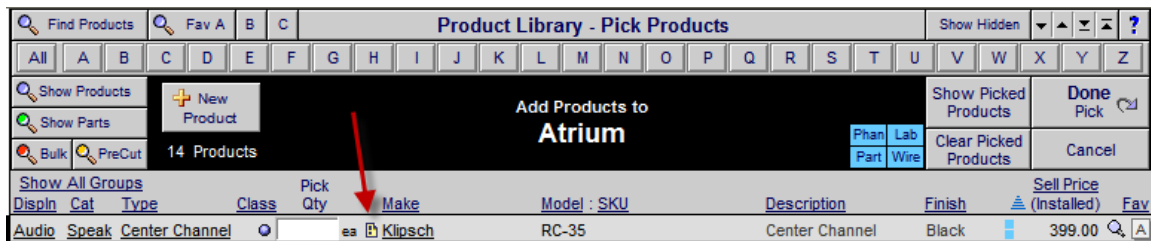
This can be changed in the Master Preferences/Proposals/Print Options and in the Proposal/Print Menu/Print Options screens.

Area Sort

Optional ☐ Normal Sort = Location/Zone/Placement
Optional Sort = Zone/Location/Placement

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

Cue Notes

☒ Show Product Cue Notes when Picking Products into a Proposal

☒ Show Product Cue Notes when Picking Products into a POS Invoice

Set & Subset Cue Notes will not show when picking Sets

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.

Proposal - Client Info		Print	?
Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100		Created 9/11/2008 Modified 11/11/2008 Sold Completed	Done Follow-Up
Switch Contact		Numbers	

Follow Up Letters View		Printer Setup	?
Print on your Letterhead <input type="checkbox"/> Print All Letters <input type="checkbox"/> Print Client Mailing Labels <input type="checkbox"/> No Date on Letters		Leave	
Jim Engandela Horizon Software S. 15700 Hwy U. Strum, WI 54770			
Follow Up Letters			
<div> <div> 1 Post Consultation </div> <div> 2 Post Proposal </div> </div> <div> <div> 3 Acceptance </div> <div> 4 Contact Notification </div> <div> 5 Rejection </div> </div> <div> <div> 6 Pre - Progress Payment </div> <div> 7 Trim - Progress Payment </div> <div> 8 Final - Progress Payment </div> </div> <div> <div> 9 Specialist Thank You </div> <div> 10 Manager's Thank You </div> <div> 11 President's Thank You </div> </div>			

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.

Proposal - Related Contacts Print ?

Client **Details**

Mr. Jim Engandela
Horizon Software
Home Entertainment System
1267.1-1.100

Project **Contacts** **Com Log**

Follow-Up

Add/Pick **Contacts Related to this Project** **Permanent Contact Notes** **Project Notes**

Category: Contractor Label: Phone: 715-832-4837

First Name: Lehmen Last: Larson Mobile:

Company: Architectural Planning & Drafting Services Radio ID:

Address: 1946 112th Street Fax: 715-832-5532

City: Chippewa Falls St: WI Zip: 54729 eMail: architecturalplanning@tr

Category: Contractor Label: Phone: 608-989-2571

First Name: Dave Last: Stetzer Mobile: 608-797-0164

Company: Stetzer Electric Radio ID:

Address: 520 W. Broadway St. Fax: 608-989-2570

City: Blair St: WI Zip: 54616 eMail: stetzerelectric@lolo.net

Blair to Taylor to Hixton
NSP rotten neutral.
Gas goes from Eleva to
Mpls.
Guy in Mondovi and
everybody in creek

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.

Alt Prod View	Show All	All 24 Products	Proposal - Products						Adjust Selected Prices	Update All Products	Done
Areas	Products	Text	Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100						Replace Selected Products	Delete All Options	Product Total \$60,050.89
Labor	Parts	Wire	Tasks	Zone - Area	Make	Model	Product Labor	Unit List	Adjusted Sell	Extended Sell	
Discipline	Description	Category	Phase	Type	Class	Parts Labor	Min Sell	Unit Cost	Unit Sell	GP%	Ext Discount
1 ea	1 - Home Theater	Sony	DVP-NS999ES	\$35.00	\$1,199.95	\$1,099.95	\$1,099.95	\$1,134.95			
Video	Progressive Scan DVD Player	Progressive	3	Product	\$120.00	\$620.40	43.6%	-\$100.00			
1 ea	1 - Home Theater	Crestron	C2N-DB12	\$200.00	\$260.00	\$260.00	\$260.00	\$260.00			
Automation	Decorator Keypad 12 Button	Decorator	2	Product	\$120.00	\$130.00	50.0%				

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.

Reg Prod View	Show All	All 24 Products	Proposal - Alt Product View						Adjust Selected Prices	Update All Products	Done
Areas	Products	Text	Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100						Replace Selected Products	Delete All Options	Product Total \$60,050.89
Labor	Parts	Wire	Tasks	Zone - Area	Make	Model	Product Labor	Unit List	Adjusted Sell	Extended Sell	
Discipline	Description	Category	Phase	Type	Class	Parts Labor	Min Sell	Unit Cost	Unit Sell	GP%	Ext Discount
1 ea	1 - Home Theater	Sony	DVP-NS999ES	\$35.00	\$1,199.95	\$1,099.95	\$1,099.95	\$1,099.95			
1 ea	1 - Home Theater	Crestron	C2N-DB12	\$200.00	\$260.00	\$260.00	\$260.00	\$260.00			
1 ea	1 - Home Theater	Linn	5101 Personal Handset	\$148.33	\$390.00	\$390.00	\$390.00	\$390.00			

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.



Areas & Products Report - Pricing

Show Line Item Prices

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

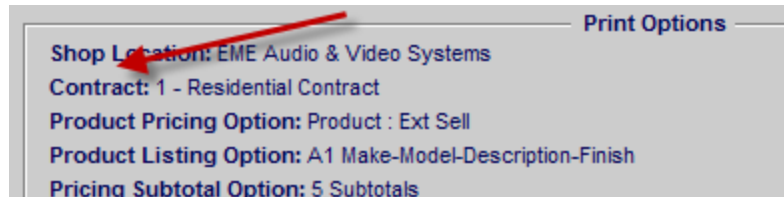
Area Totals ☒ Show Area Totals ☐ Hide Area Totals

Show "Option Prices" in Product Description

- ☐ Do Not Show Option prices
- ☐ Show as selected Print Option prices
- ☒ Show Prices regardless of Print Option setting
- ☐ Show as Installed Products & Supplements

Enhancement – Proposal/Print Menu: Show selected Contract

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



Print Options

Shop Location: EME Audio & Video Systems

Contract: 1 - Residential Contract

Product Pricing Option: Product : Ext Sell

Product Listing Option: A1 Make-Model-Description-Finish

Pricing Subtotal Option: 5 Subtotals

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.

12/8/2008

User Statistics

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

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


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


Project Utility - Export ?


Dennis Goss


Central Vacuum System
1275.1-1.100

ProjectExportAdmin


**Impact GraphicsDraw! Data Export** - Help guides are on the GraphicsDraw screen.
Example of file name produced. GD_OrgChart_1296.1-1.100.tab


**Export Project Data - By Discipline**

**Export Project Data - By Area**

**Export Project Data - By Phase**

This utility will export this Proposal/Project and let you name the file.

**Tyler - Export this Project**
This utility will export this project and save it in your SCPS folder as a .dbf or .tab file
Example of file name produced. TylerProjectDataExport.tab

**Export this Project as a FileMaker File**
This utility will export this proposal and save it in your SCPS folder.
These file names all start with xProp.

To import this proposal back into SCPS please go to the System Utilities/Import screen from the main SCPS logo screen.

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.

Work Order Install Notes



Installation

- 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

Area Labor:		7:30:00	Breakfast Room		
ID	PZ	Install Date	Labor Time	Qty	Make - Model
1	3		7:30:00	1 ea	Linn : Akito Pick up tonearm Installation 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

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 <input type="text" value="Black"/> Weight <input type="text"/>				Warranty Factory Warranty <input type="text" value="5 years Parts & Labor"/> Extended Warranty <input type="text"/>															
Dimensions <input type="radio"/> HWD <input type="radio"/> WHD Product Dimensions <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Cut Out Dimensions <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Rack Spaces <input type="text" value="1"/> Box Type <input type="text"/>				Power Consumption <table border="1"><thead><tr><th colspan="2">Consumption</th><th colspan="2">Amp Draw</th></tr></thead><tbody><tr><td>AC Power</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>DC Power</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></tbody></table>				Consumption		Amp Draw		AC Power	<input type="text"/>	<input type="text"/>	<input type="text"/>	DC Power	<input type="text"/>	<input type="text"/>	<input type="text"/>
Consumption		Amp Draw																	
AC Power	<input type="text"/>	<input type="text"/>	<input type="text"/>																
DC Power	<input type="text"/>	<input type="text"/>	<input type="text"/>																
Installation Issues Mounting Height <input type="text"/> Distance from floor <input type="text"/>				Power Output Power Output <input type="text"/> watts per <input type="text"/> channels @ <input type="text"/> ohms Power Output <input type="text"/> watts per <input type="text"/> channels @ <input type="text"/> ohms Power Output <input type="text"/> watts per <input type="text"/> channels @ <input type="text"/> ohms															
Work Order Install Notes <div></div>				Product Specification Notes Connections <ul style="list-style-type: none">o Audio Input: 1 analogo Audio Output: 2 analogo Video Input/Output: 2 video sensing inputs; component, S-video, and composite video outo On-screen display output: SD or HDo Serial: 2 DB9 RS232 connectorso Contact: 1 input, pluggable terminal blockso Relay: 1 output, pluggable terminal blockso IR: 1 front panel input, 1 front panel blaster output6 outputs, 3.5mm jackso USB: 2 rear, USB 2.0															

Product Specifications

Jim Engandela
Home Entertainment System
1327.1-1.100

AUDIO

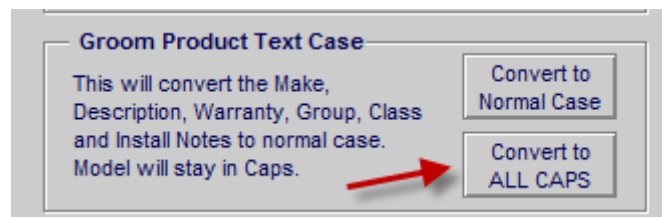
1 ea	Linn - Akito - Pick up tonearm		
Finish	Black		
Dimensions			
Cut Out Size			
Rack Spaces	1	Box Size	1
Mount Height			
Weight	Amp Draw		
AC Power			
DC Power			
Spec Notes	<div>Connections<ul style="list-style-type: none">o Audio Input: 1 analogo Audio Output: 2 analogo Video Input/Output: 2 video sensing inputs; component, S-video, and composite video outo On-screen display output: SD or HDo Serial: 2 DB9 RS232 connectorso Contact: 1 input, pluggable terminal blockso Relay: 1 output, pluggable terminal blockso IR: 1 front panel input, 1 front panel blaster output6 outputs, 3.5mm jackso USB: 2 rear, USB 2.0</div>		

**Enhancement – Product Library & Proposal: Product Spec Notes**

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

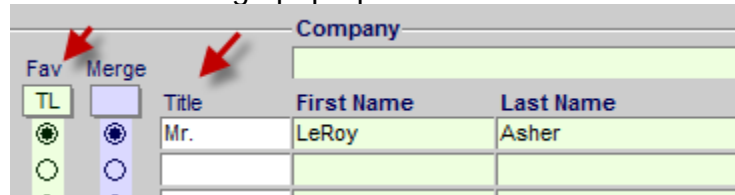
Enhancement – Product Library/Utility/Utility 1: Convert Text

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

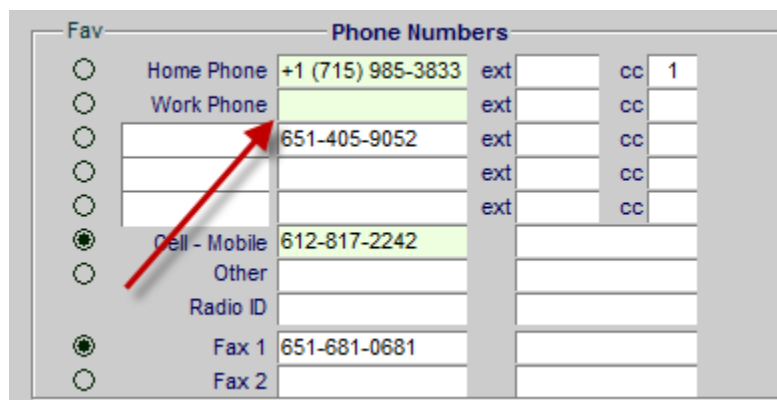
The label Salutation has been changed to Title on all screens and this new label is reflected in the Fav and Merge pop up selection as well.



Company	
Fav	Merge
TL	Title
Mr.	LeRoy
	Asher

Enhancement – Contact/Detail: Increase Phone Field length

Increase the size of the phone fields on all screens

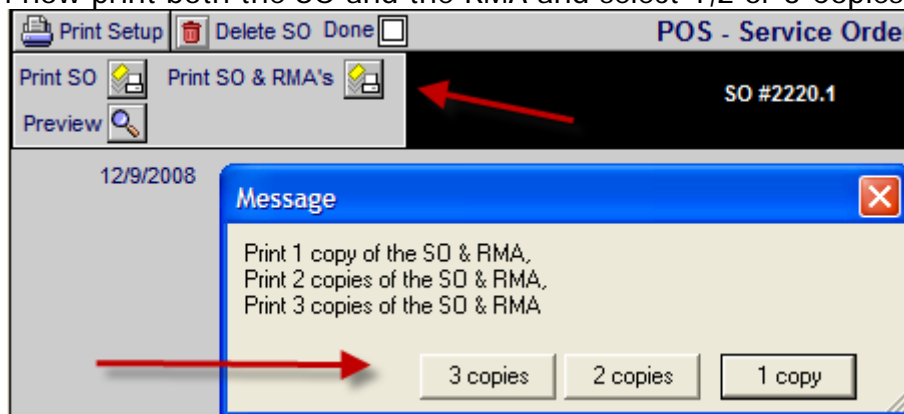


Phone Numbers	
Home Phone	+1 (715) 985-3833
Work Phone	651-405-9052
Cell - Mobile	612-817-2242
Other	
Radio ID	
Fax 1	651-681-0681
Fax 2	

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.



12/9/2008

Print Setup Delete SO Done

Print SO Print SO & RMA's

Preview

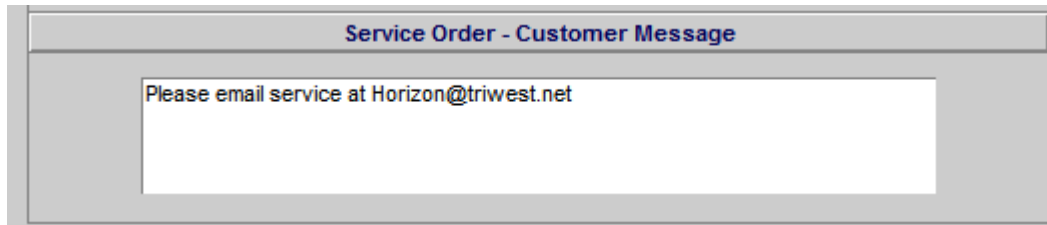
SO #2220.1

Message

Print 1 copy of the SO & RMA,
Print 2 copies of the SO & RMA,
Print 3 copies of the SO & RMA

3 copies 2 copies 1 copy

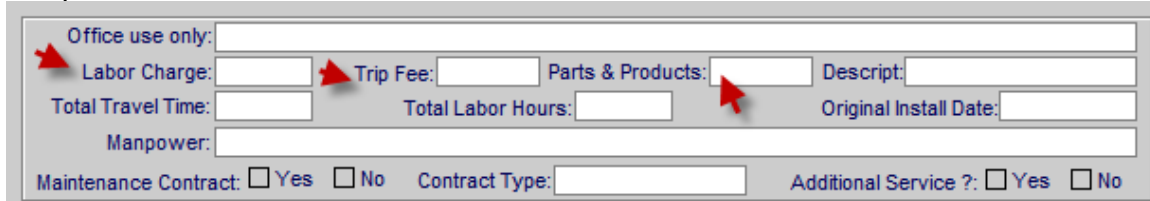
-A message can be added to your Service Order as a default for newly created POS SO's in Master Prefs/POS screen and modified in the POS SO/Setup screen.



Service Order - Customer Message

Please email service at Horizon@triwest.net

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



Office use only: _____

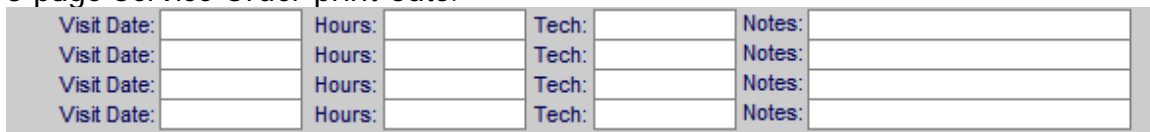
Labor Charge: _____ Trip Fee: _____ Parts & Products: _____ Descript: _____

Total Travel Time: _____ Total Labor Hours: _____ Original Install Date: _____

Manpower: _____

Maintenance Contract: ☐ Yes ☐ No Contract Type: _____ Additional Service?: ☐ Yes ☐ No

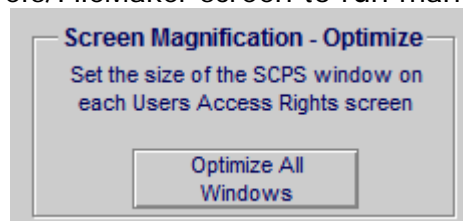
-These fields have been added to the Service Order screen and both 1 page and 3 page Service Order print outs.



Visit Date:	Hours:	Tech:	Notes:
Visit Date:	Hours:	Tech:	Notes:
Visit Date:	Hours:	Tech:	Notes:
Visit Date:	Hours:	Tech:	Notes:

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.



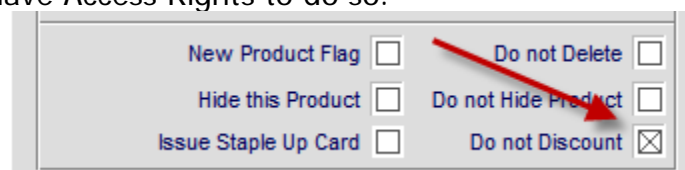
Screen Magnification - Optimize

Set the size of the SCPS window on each Users Access Rights screen

Optimize All Windows

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.



New Product Flag ☐ Do not Delete ☐

Hide this Product ☐ Do not Hide Product ☐

Issue Staple Up Card ☐ Do not Discount ☒

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.

Zone	Area	Qty	Make	Model	Class	Bulk Run	No	Wire	Wire & Cable	Make	Model	Tax	Install	Unit Sell	Ext Sell
Attic		1	AV Widgits	wire test	Bulk Wire	Home		150 ft	Monster	16/2 Spkr Wire		T T	1		
Attic		1	AV Widgits	wire test	Pre-Cut			1 ea	Monster	1400MKII-5M		T T	3		

Fix – Proposal/Duplicate: Retain Proposal Tax Setting

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

Select Tax

Tax ☐ Yes ☒ No

Add New Tax

Eau Claire	54770	5.500%
		5.500%

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

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

Area Totals ☐ Show Area Totals ☒ Hide Area Totals

Areas & Products

- Including Proposal Grand Totals
- Product Prices include all Supplements

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.

Alt Prod View		Show All Products		All 24 Products		Proposal - Products					Home						
Areas		Products		Text		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100					Adjust Product Prices		Update All Products		Done		
Labor		Parts		Wire							Tasks		Replace Many Products		Delete All Options		Product Total \$60,050.89
View		Zone - Area		Make		Model		Product Labor		Unit List		Adjusted Sell		Extended Sell			
Delete		Replace Product		Discipline		Category		Type		Parts Labor		Unit Sell		Ext Installed			
		Option		Description		Phase		Class		Wire Labor		Unit Cost		GP%		Ext Discount	
		1 ea		1 - Home Theater		Sony		DVP-NS999ES		\$35.00		\$1,199.95		\$1,099.95		\$1,099.95	
				Video		Source		DVD Player		\$0.00		\$999.95		\$1,099.95		\$1,134.95	
				Progressive Scan DVD Player		Progressive		3 Product		\$120.00		\$620.40		43.6%		-\$100.00	

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.

Master Prefs - Labor Sub Category - Lists

Home Done

Labor Supplements Labor Categories Labor Rates Labor DOD

Labor Categories

- 1 - Installation
- 2 - Programming
- 3 - Training
- 4 - Parts Labor
- 5 - Wire Labor - Bulk
- 6 - Wire Labor - Precut

Update Labor Categories

After changing Labor Categories click this button to Update the Labor Categories on All Product Groups in your Product Library

Labor Sub Categories Value Lists

Installation Labor Category 1	Programming Labor Category 2	Training Labor Category 3
Calibration: Audio/Field	Bench: Testing/Burn-in	Device: Configuration
Calibration: Audio/Shop	Cabling: Labeling/Field	Device: Evaluation
Calibration: Video/Field	Cabling: Labeling/Shop	Device: Firmware upgrade
Calibration: Video/Shop	Cabling: Rough Trim-out	Device: Rack Install
Client: Training	Cabling: Rough-in/New	Device: Rack termination
Client: Walk-thru/Finish	Cabling: Rough-in/Retro	Engineering: Documentation
Client: Walk-thru/Rough-in		Engineering: Schematics
		Engineering: System Design
Rack: Assembly		Engraving: Layout
Rack: trim-out - field		Engraving: Order processing
Rack: trim-out - Shop		Flat-Panel: Mounting
Receiving/Staging		Head-End: Termination
Trim-out		In-House: Manufacturing
Trim-out: Flat-Panels		Project Mgmt: Electrical Work
Trim-out: Speaker		Project Mgmt: Phase/Finish
Trim-out: UI		Phase/Rough-in
Trim-out: Wall-Jack		Project Mgmt: Phase/Shop

- 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.

Groups Labor Parts Wire Tasks **Master Prefs - Labor Supplements** Print ? Home

Labor Supplements Labor Categories Labor Rates Labor DOD Select a Product Group Add Categories and Labor Time Done

Labor Time for Groups classified as "Product"

Primary Install Phase 3 Final Audio : Source : Phono

Labor Sub Categories 6:00:00

Labor Time is formatted in Hours:Minutes:Seconds.
Max of 60 Minutes & Seconds

Add Install Phases

Labor Categories	Labor Rate	1 Prewire	2 Trim	3 Final	
1 - Installation	\$60.00	1:00:00			
2 - Programming	\$80.00		2:00:00		
3 - Training	\$100.00			3:00:00	

Message

Do you want to View/Print the Labor Category Report or the Labor Sub Category Report?

Total

00:00 = 6:00:00 hrs:min.sec
00.00 = \$520.00 Amount

- 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.

Delete all SubCats Master Prefs - Group Assigned - Labor Sub Categories Print Refresh

Add Labor Sub Category and Labor Time
Please click Refresh after changing Times Done

Product Group
Audio : Source : Phono

Total Labor 6:00:00

Sub Categories can be used to create a breakout of Labor time for each Labor Category.
There are no dollars involved in Sub Categories only Labor Time.

Labor Category 1
Add Sub Cat

Installation
1 Prewire 2 Trim 3 Final

Calibration: Audio/Field 1:00:00 = 1:00:00

Total Time 1:00:00 = 1:00:00

Labor Category 2
Add Sub Cat

Programming
1 Prewire 2 Trim 3 Final

Bench: Testing/Burn-in 2:00:00 = 2:00:00

10/27/2008	Labor Sub Categories by Product Group				Page 1
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.

Product Library - Labor Override 1 of 340 ? Home

Linn Akito
Pick up tonearm
Audio : Source : Phono

Done Return to List
Prev Next

ics Pix PDF **Labor** Parts Wire Tasks

Override Labor

Audio : Source : Phono
Classification: Product
Primary Install Phase: 3 Final

Labor Categories		Hourly Labor Rate	Override Labor Time (hrs:min:sec)			
Add	Labor Sub Categories		Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	
	7:30:00					
	1 - Installation	\$60.00	1:30:00			
	2 - Programming	\$80.00		2:30:00		
	3 - Training	\$100.00			3:30:00	

Reset All Labor to Group Assigned Labor

DOD = 1

Apply DOD 2 Avg 10%

Apply DOD 3 Avg 50%

Total Labor Time	1:30:00	2:30:00	3:30:00	=	7:30:00 Total Hrs
Total Labor Amount	\$90.00	\$200.00	\$350.00	=	\$640.00 Total

- 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.

Alt Labor View Primary Phase: 3 Final Proposal - Product Labor Supplements 1 of 2 ? Home

LeRoy Asher
1306.1-1.100
Linn : Akito
Audio : Source : Phono

Labor Sub Cats 7:30:00

Product Specs Pix - PDF's Labor Parts Wire Tasks Atrium

Add Labor Supplement Phase 1+2+3 Total Labor for 2 ea Linn : Akito Refresh

Labor Type Total DOD: 0%	Labor		Time		Cost		Sell	
	Cost	Sell	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD
1 - Installation	\$30.00	\$60.00	1:30:00	3:00:00	\$45.00	\$90.00	\$90.00	\$180.00
2 - Programming	\$40.00	\$80.00	2:30:00	5:00:00	\$100.00	\$200.00	\$200.00	\$400.00
3 - Training	\$50.00	\$100.00	3:30:00	7:00:00	\$175.00	\$350.00	\$350.00	\$700.00
Phase 1+2+3 Total Labor:			7:30:00	15:00:00	\$320.00	\$640.00	\$640.00	\$1,280.00

Phase 1 Prewire Labor for 2 ea Linn : Akito

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

Product Labor Sub Categories

Product Labor Sub Cats
Labor Sub Categories

10/27/2008 Labor Sub Categories by Product Page 1

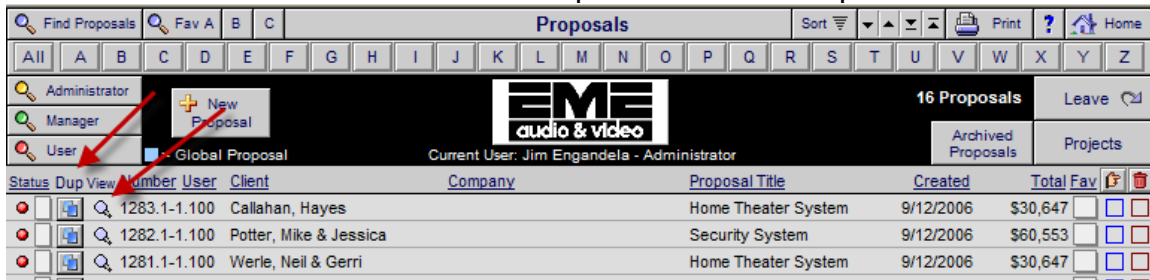
Home Entertainment System
for LeRoy Asher
1306.1-1.100

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

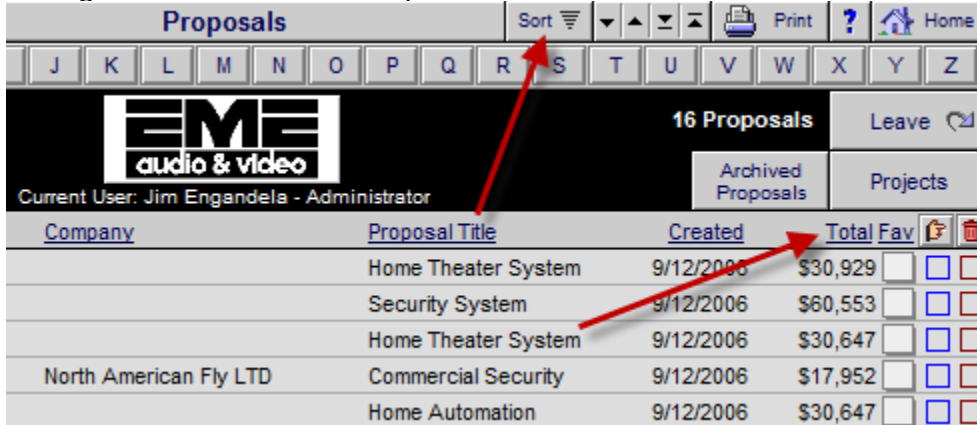
Enhancement – Proposal List: Move Duplicate button to left side.

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.

Installation & Payment Type		Update
New-3 Phase Pre-Trim-Final		

Labor Degree of Difficulty		Update
Building Type	Frame	
Number of Floors	1	
Project Difficulty	5 %	
1 - Prewire 5%	2 - Trim 5%	3 - Final 5%

Wire and Cable Supplements		Update
Building Size	9,000 Sq Ft	
Bulk Home Run - Avg Wire Length:	246 feet per Home Run	
Bulk Room Run - Avg Wire Length:	75 feet per Room Run	
Itemize each Wire & Cable entry:	<input checked="" type="radio"/> Yes <input type="radio"/> No	

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.

Master Prefs - Other - Products 1

Proposals Projects **Products 1** Products 2 Counters Misc 3rd Party Graphics

Product Library

Sort Product Library from Logo Screen ☐ Yes ☒ No (No Sort recommended)

☐ Have the AlphaFinder only show Products. not Parts or Wire

☐ Go to Product Override Labor screen, instead of Group Labor screen

☐ Display CPS Labor and Status amounts on Product Detail List screen

☒ When Picking Products & Sets into Proposals, Force Show Product Cue Notes

☒ Do not Show Cue Notes when Replacing All Products in a Proposal

Proposal - Product Utility

Sikandar Bashir

Whole House Music System
1292.1-1.100

View Delete Replace Zone - Area Make Model
Discipline Category Type
Option No Discount Description Phase Class

1 ea 1 - Home Theater Crestron 2 AADS
Audio Multi-room Switcher
Adagio Audio Distribution System Product

2 Trim

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.

Proposal Payment Steps				
Deposit	Step 1	Step 2	Step 3	Holdback
Deposit	Payment 1	Payment 2	Payment 3	Hold Back
%	Pymt %	Pymt %	Pymt %	%

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.

Alt Area View Auto Build ☐ No Add Product Prompt **Proposal - Areas & Products**

Jim Engandela
Home Entertainment System
1296.1-2.101

Areas Products Text Labor Parts Wire Tasks

Loc Zone Pick or Type Area Add Area Add Products

Location Zone Sort Area Rename Dup Del Discipline Cat : Type Sort Qty

Check All Uncheck All **User Access Rights**

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

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

Proposal No Add Product Prompt
☒

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.

EME Audio & Video Systems 2950 Mall Drive Eau Claire, WI 54701
Ph: 715-287-3335 Fax: 715-287-4464 horizon@triwest.net www.horizon-software.com
Proposal: 1292.1-1.100 Nov 2, 2008 Areas & Products Page: 1 Initials: ____

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.

EME Audio & Video Systems 2950 Mall Drive Eau Claire, WI 54701
Ph: 715-287-3335 Fax: 715-287-4464 horizon@triwest.net www.horizon-software.com
Proposal: 1282.1-1.100 Nov 3, 2008 Shop Intro Page: 1

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.

Alt Billing | **Proposal - Client Info** | Print | ?

LeRoy Asher | Created 10/21/2008 | Done
Modified 11/3/2008
Sold
Completed | Follow-Up

Client | Details | Project | Contacts | Com Log

Home Entertainment System
1306.1-1.100

Client | Modify or Switch Contact

First Name: LeRoy
Last Name: Asher
Company:
Proposal Name: Mr. LeRoy Asher
Fav Format: SFL Salutation + First Name + Last Name

Numbers

Home Phone: 715-985-3833 Ext:
Work Phone: Ext:
Mobile:
Fax:
Other: Ext:
Radio ID#:

Address

Proposal - Contact Detail

Add a New Contact or Modify this Contact information

Labels

Category: Client | Class: | Key: Stray Voltage | ID:
Group: | Status: | Staff:

Company | Vendor # | W

Fav: SFL | Merge:
Salutation: Mr. | First Name: LeRoy | Last Name: Asher | Title:

Home Entertainment System
for Mr. LeRoy Asher

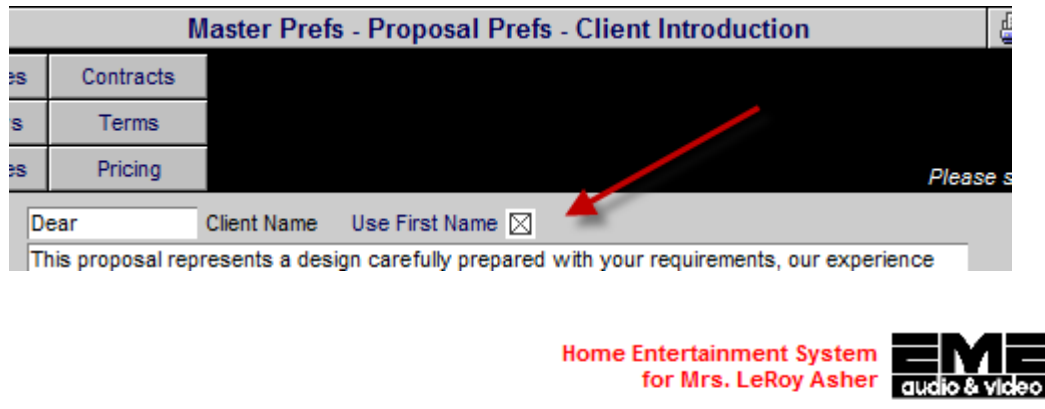


About EME Audio & Video



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.

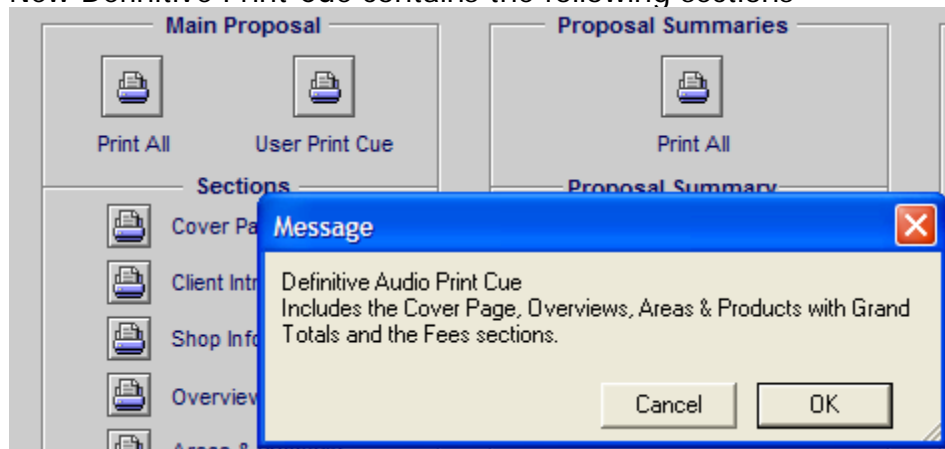


Dear LeRoy,

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

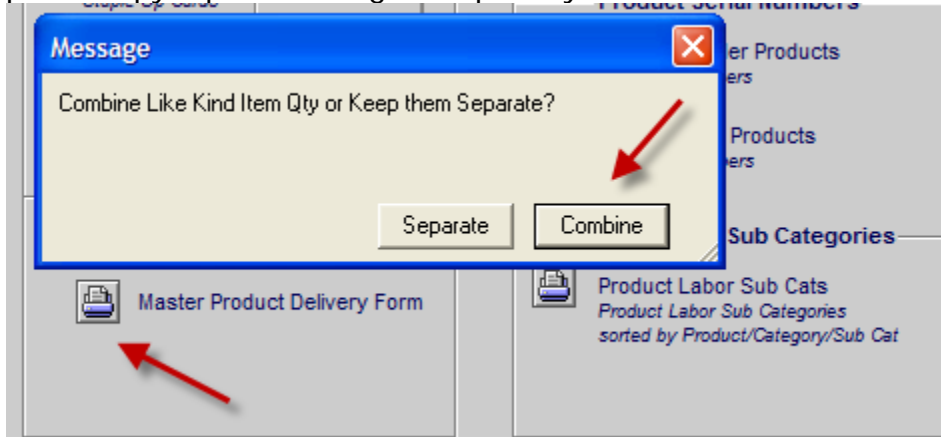
Enhancement – Proposal/Print Menu: Definitive Print Cue

New Definitive Print Cue contains the following sections



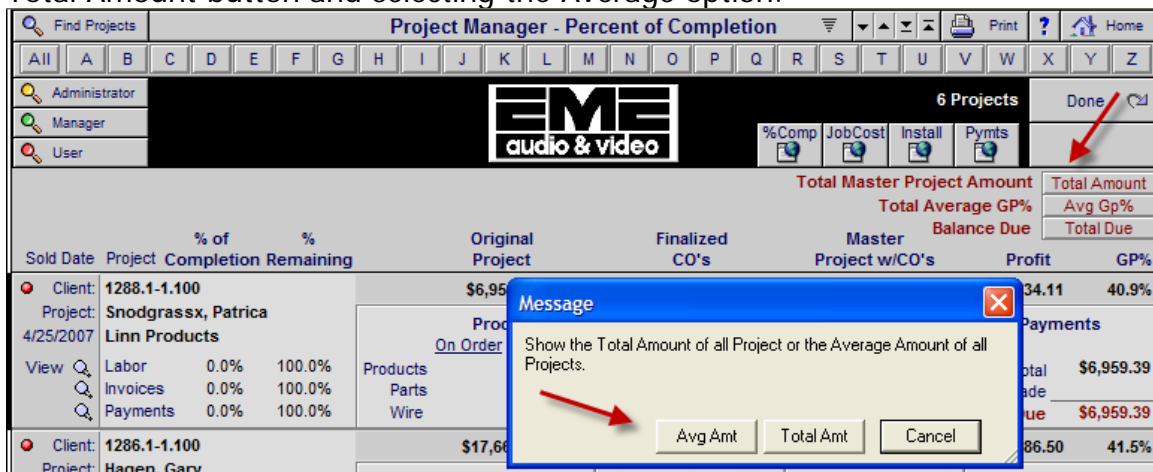
Enhancement – Project/Print Menu/Shop: Combining Qty Option

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.

Show All PO's		Global PO Help ?	Global Purchase Orders			
Global PO: Click on the PO Vendor to Group PO's UnStage (uncheck) unwanted PO's Click on Create Global PO to create a new Group PO Choose a Combined Line Item or Separate Line Item PO			Issued PO's			
View	Project	SCPS PO	User PO #	QB PO #	Posted Date	Pick Vendor
	1268.1-1.100 Dana Berkow	1073			9/12/2006	Linn Products
	1268.1-1.100 Dana Berkow	1074			9/12/2006	Runco International
	1284.1-1.100 John & Mary Smith - Amphar	1075			9/12/2006	Linn Products
	1284.1-1.100 John & Mary Smith - Amphar	1076			9/12/2006	Runco International
	1286.1-1.100 Gary Hagen	1078			9/13/2006	Linn Products

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

Product Library - Line List

Find Products Fav A B C S T U V W X Y Z

All A B C D E F

Show Products Add New Product

Show Parts

Bulk PreCut 3 of Items

Show All Groups

Displn Cat Type Class View

Message

Show All Products including Hidden, Show Only Hidden Products or Cancel.

Cancel Hidden All

Other Views Inventory Control Leave

Phan Lab Auto Tag

Part Wire Show Hidden Product Sets

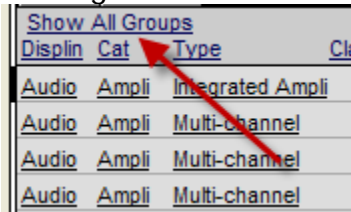
Print Menu

Finish Notes Sell Price (Installed) Fav Hide

Audio	Ampli	Surround Process	Linn	5103 System Controller	Linn 5103 inc DTS, no	5,500.00 ea	A	☒	☐
Audio	Speak	On-Wall	Linn	5110-W	Pair of on-wall	White 325.00 ea	A	☒	☐
Audio	Multi	Controller	Linn	R4S5	Room & Source	Black 1,670.00 ea		☒	☐

Enhancement – Product Library: Show All Groups

Clicking on the Show All Groups



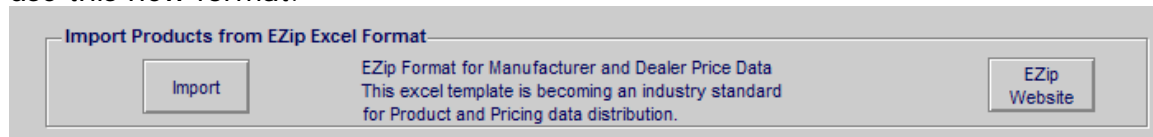
Show All Groups	Displin	Cat	Type	Cle
	Audio	Ampli	Integrated Ampli	
	Audio	Ampli	Multi-channel	
	Audio	Ampli	Multi-channel	
	Audio	Ampli	Multi-channel	

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.

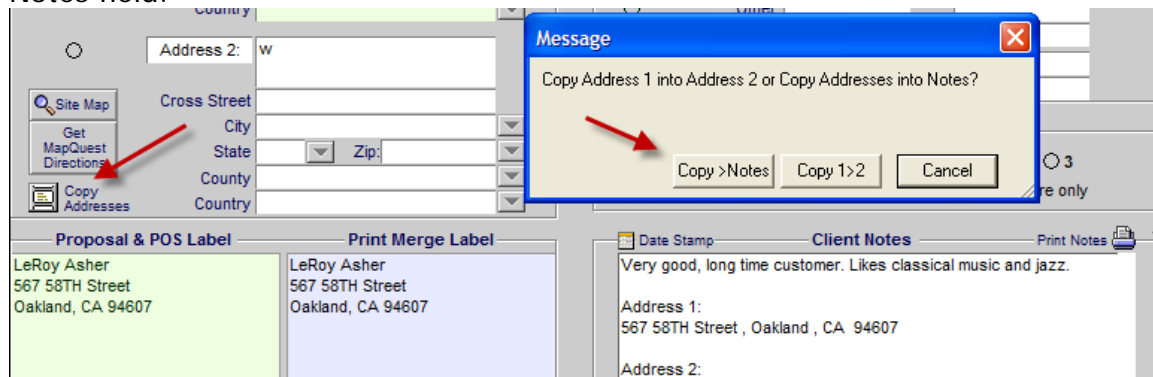


Import Products from EZip Excel Format

EZip Format for Manufacturer and Dealer Price Data
This excel template is becoming an industry standard
for Product and Pricing data distribution.

Enhancement – Contacts/Contact Detail: Copy Address Button

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



Country: [dropdown]
Address 2: w [text]
Cross Street [text]
City [text]
State [dropdown] Zip: [text]
County [text]
Country [text]

Message
Copy Address 1 into Address 2 or Copy Addresses into Notes?

Proposal & POS Label
LeRoy Asher
567 58TH Street
Oakland, CA 94607

Print Merge Label
LeRoy Asher
567 58TH Street
Oakland, CA 94607

Client Notes
Very good, long time customer. Likes classical music and jazz.
Address 1:
567 58TH Street , Oakland , CA 94607
Address 2:

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.

Contacts - Auto Prefs						?	Home
LeRoy Asher						Set Preferences for creating Proposals & POS Invoices for this Contact	
Client	Info	Com Log	Entities	Transactions	Auto Prefs	Done	Prev Next 1 of 134
Proposal Labor Rate Set Default Labor Rate <input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3							
				Basic Rate	Inner City Rate	Prewire only	
			1 - Installation	\$60.00	\$80.00	\$30.00	
			2 - Programming	\$80.00	\$100.00	\$30.00	
			3 - Training	\$100.00	\$120.00	\$25.00	
			4 - Parts Labor	\$50.00	\$60.00	\$25.00	
			5 - Wire Labor - Bulk	\$60.00	\$70.00	\$25.00	
			6 - Wire Labor -	\$60.00	\$70.00	\$25.00	
Alternate Billing Contact Rex Feil - Applied Industrial Technologies							
Pick	Contact	Company	Pick	Company	Contact		
<input type="checkbox"/>		EME Audio & Video Systems	<input type="checkbox"/>	All Creative Enterprises	Matthews, Ace		
<input type="checkbox"/>		Horizon	<input type="checkbox"/>	Amphar	Smith, John & Mary		
<input type="checkbox"/>	Asher, LeRoy		<input type="checkbox"/>	Applied Industrial Technologies	Feil, Rex		
<input type="checkbox"/>	Back, Eileen		<input type="checkbox"/>	Architectural Planning & Drafting	Larson, Lehmen		
<input type="checkbox"/>	Bashir, Sikandar		<input type="checkbox"/>	Buffalo River Clinic	Screnok, Tom		
<input type="checkbox"/>	Bentel, Tom	Direct TV	<input type="checkbox"/>	Capitol Sales Company	Klise, Pat		
<input type="checkbox"/>	Berger, Talli		<input type="checkbox"/>	Chippewa Valley Eye Clinic	Dow, Thomas		
<input type="checkbox"/>	Berkow, Dana		<input type="checkbox"/>	Computer Technology, Inc.	Schwamb, Rick		
<input type="checkbox"/>	Brain, Cyriasa		<input type="checkbox"/>	Creston Electronics, Inc	Johnson, Craig		
<input type="checkbox"/>	Burkes, Tom & Kelly & Family	Sunbelt Business Brokers	<input type="checkbox"/>	Direct TV	Bentel, Tom		
<input type="checkbox"/>	Callahan, Hayes		<input type="checkbox"/>	Electronic Design Associates	Engandela, Jim		
<input type="checkbox"/>	Campbell, Mike		<input type="checkbox"/>	Elite Builders	Dixel, Don		
<input type="checkbox"/>	Carlson, Mary		<input type="checkbox"/>	EME Audio & Video Systems			

Client & Project - Alternate Billing

LeRoy Asher

Home Entertainment System
1319.1-1.100

Modify Billing Client Modify or Switch Contact:

☐ Check to Bill this Client

Prefix First Name
 Last Name
 Company

Billing Numbers

Home Phone
 Work Phone
 Mobile
 Fax
 Other
 Radio ID#

Print ? Done

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.

Show All	Find Items	Proposals	Master Tracker		Milestones	Util ? Home
New Task	Past Today	Change Orders	Thursday		Proposals Due	Gantt Leave
New Appointment	This Week	Completed	October 10, 2008		Install Phases	Calendar Email All
	This Month	Tasks	User: Jim Engandela		Payments Due	Tracker Print Menu
	Next Month	Appointments	38		Purchasing Due	
Adm Done	Due Date	Tracker Item	Proposal Project	Item Owner	Total Labor	Tag
Mgr	Month - Day	Item Name	Client	Email	225:09	Info eMail
User Hide	Appoint Time	Description	Company	Status/Notes	Total Pymts	Print CC Delete
	11/1/2008	Proposal Milestone - Proposal Due	1290.1-1.100	Jim Engandela	\$171,039.91	
	Nov - Sat	Proposal Due	Jim Engandela	No email		
		Present proposal to client				
	11/2/2008	CO Milestone - Payment	1284.1-1.100	Sandy Engandela	\$21,167.93	
	Nov - Sun	Payment	John & Mary Smith	horizonse@trivest.net		
		Phase 1 - Prewire - Payment	Amphar			
	11/2/2008	CO Milestone - Payment	1284.1-1.100	Sandy Engandela	\$21,167.93	
	Nov - Sun	Payment	John & Mary Smith	horizonse@trivest.net		
		Phase 1 - Prewire - Payment	Amphar			

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.

Mailing Label & Proposal Name

Contact Category

Fav Format, Salutation & Proposal Name

Salutation + First Name + Last Name

Mr. LeRoy Asher

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.

Proposal - Product - Pure Labor Supplements

Jim Engandela

Home Entertainment System
1305.1-1.100

Pure Labor in Atrium

Pick Area	Zone - Area	Pure Labor Supplements	Phase 1 Prewire (h:m:s)	Phase 2 Trim (h:m:s)	Phase 3 Final (h:m:s)	Total (h:m:s)
	Atrium	Installation	\$60.00	0:30:00		0:30:00
Total Labor Time				0:30:00		0:30:00
Total Labor Time/w DOD			0:00:00	0:30:00	0:00:00	0:30:00
Total Labor Sell				\$30.00		\$30.00

Products in Atrium

Edit Labor	Make	Model	Phase	Labor Type	Sort	Assigned to Make : Model	Total Time (h:m:s)	Ext Sell
Supplemental	Items			Installation		Supplemental : Items	0:30:00	\$30.00

All Labor in Atrium

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.

Proposal - Payment Terms

LeRoy Asher

Home Entertainment System
1306.1-1.100

Payment Terms

Payment Method	Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback
Actual	Deposit	Payment 1	Payment 2	Payment 3	Hold Back
	Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.
	Amount	Amount \$518.10	Amount \$422.00	Amount \$4,988.48	Amount

Total Payments: \$5,928.58

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

Fix – Proposal/Adding Set Area Text

No longer doubles the text entry

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

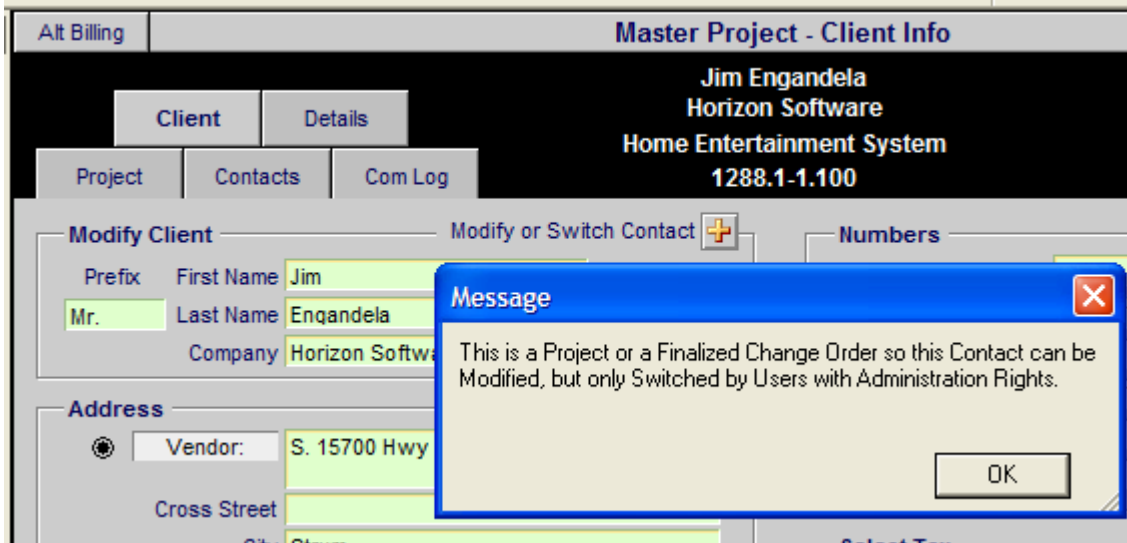
The “Check to Bill this Client” checkbox now works properly and you can click on it if you wish this contact to be the billing contact.

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

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

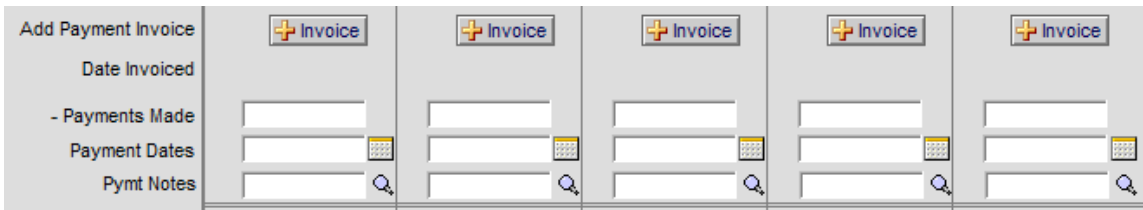
Fix – Proposal/add message when switching in a project

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

The screenshot shows the 'Appointment' form. At the top, it says 'Appointment created for Jim Engandela - Horizon Software'. Below this, there are fields for 'Task Owner' (Jim Engandela), 'Default = Current User', and 'Priority' (5). There is also a 'Created By' field. The 'Task Name' is 'New Appointment'. The 'Appt Description' field is a large text area that is currently empty.

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

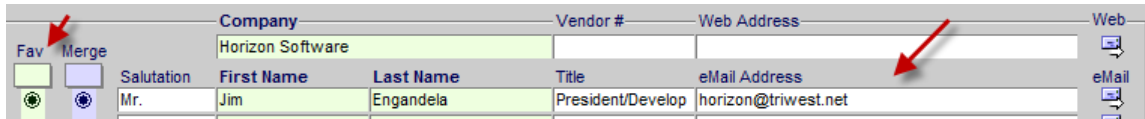
POS Invoices no longer double the tax amount.

The screenshot shows a formula field with the text 'Sum.tax EQ B.c ='. Below it, the formula 'Sum(taxEqBSub.c)' is entered. A red arrow points to the 'B' in 'B.c', indicating that this part of the formula should be changed to 'Add B'.

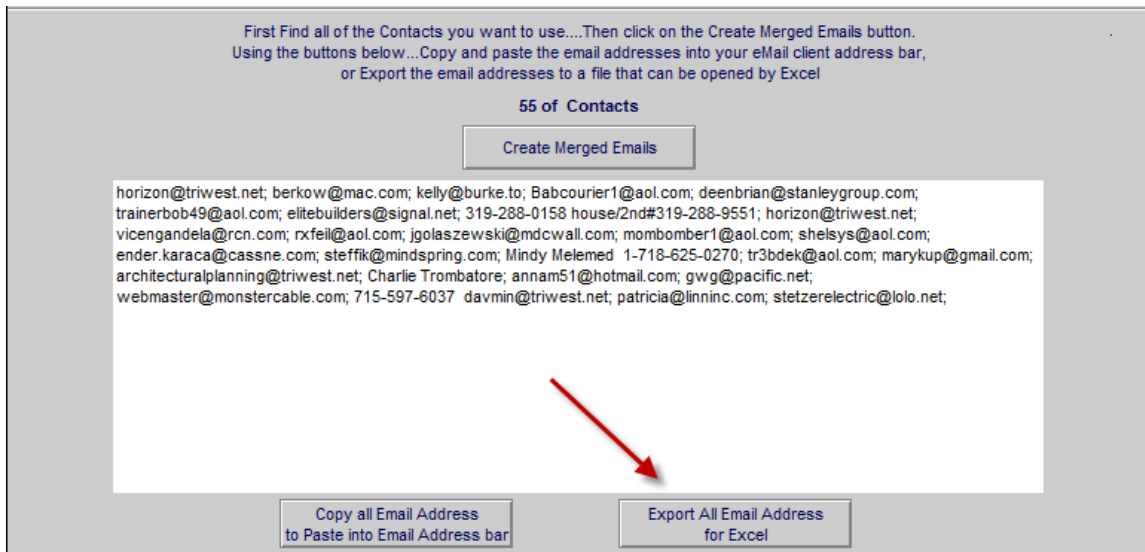
The screenshot shows the 'Client & Project - Alternate Billing' form. At the top, it says 'Sikandar Bashir' and 'Whole House Music System 1292.1-1.100'. Below this, there are two main sections: 'Modify Billing Client' and 'Billing Numbers'. The 'Modify Billing Client' section has a 'Check to Bill this Client' checkbox and fields for 'Prefix', 'First Name', 'Last Name', and 'Company'. The 'Billing Numbers' section has fields for 'Home Phone', 'Work Phone', 'Mobile', 'Fax', 'Other', and 'Radio ID#'. A red arrow points to the 'Modify Billing Client' section.

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 include the contact name along with the email address.



	Company	Vendor #	Web Address	Web
Fav Merge	Horizon Software			
	Salutation	First Name	Last Name	Title
<input checked="" type="checkbox"/>	Mr.	Jim	Engandela	President/Develop
				eMail Address
				horizon@trivest.net



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

55 of Contacts

Create Merged Emails

horizon@trivest.net; berkow@mac.com; kelly@burke.to; Babcourier1@aol.com; deenbrian@stanleygroup.com;
trainerbob49@aol.com; elitebuilders@signal.net; 319-288-0158 house/2nd#319-288-9551; horizon@trivest.net;
vicengandela@rcn.com; rxfeil@aol.com; jgolaszewski@mdcwall.com; mombomber1@aol.com; shelsys@aol.com;
ender.karaca@cassne.com; steffik@mindspring.com; Mindy Melemed 1-718-625-0270; tr3bdek@aol.com; marykup@gmail.com;
architecturalplanning@trivest.net; Charlie Trombatore; annam51@hotmail.com; gwg@pacific.net;
webmaster@monstercable.com; 715-597-6037 davmin@trivest.net; patricia@linninc.com; stetzerelectric@lolo.net;

Copy all Email Address
to Paste into Email Address bar

Export All Email Address
for Excel

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.

Show All PO's		Global PO Help ?		Global Purchase Orders						▲ Page ▼		? Home					
Global PO: Click on the PO Vendor to Group PO's UnStage (uncheck) unwanted PO's Click on Create Global PO to create a new Group PO Choose a Combined Line Item or Separate Line Item PO										Issued PO's				Done			
										PO's		WO's		Sfs		+ Create Global PO	
Global PO																	
View	Project	SCPS PO	User PO #	QB PO #	Posted Date	Pick Vendor	Staging	Created	Number	Date	Reprint	Delete					
	1284.1-1.100	1075			9/12/2006	Linn Products	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1075	8/29/08							
	1284.1-1.100	1076			9/12/2006	Linn Products	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1075	8/29/08							
	1285.1-1.100	1079			8/29/2008	Linn Products	<input type="checkbox"/>	<input type="checkbox"/>									
	1285.1-1.100	1080			8/29/2008	Sony Inc	<input type="checkbox"/>	<input type="checkbox"/>									

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

Proposal - Detail by Area				Q View	Utility	Home
Mike Hammerstad				Pricing	Purchasing	Leave
Whole House Music System				Payments	Work Orders	Tracker
1269.1-1.100				Change Orders	Invoicing	Print Menu
				Labor Meter	Total Labor	Grand Total
Qty	Make	Model		Area Totals		
1 ea	Linn	5125		26,001.49		
5 pr	Linn	Kata		2,612.50		
1 ea	Linn	Melo		4,726.25		
1 ea	Runco	CL		4,702.50		
1 ea	Sony	DVR		7,595.25		
				1,044.95		

Message

Show Install Labor Amount per Labor Hour or Install Labor as a Percentage of the Equipment Total.

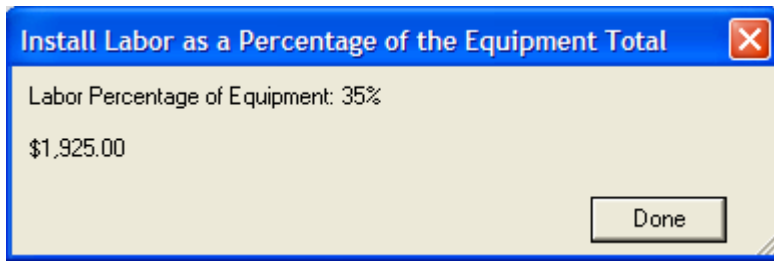
% of Equip

Per Hour

Install Labor Amount per Labor Hour

\$787.28 Per Hour

Done

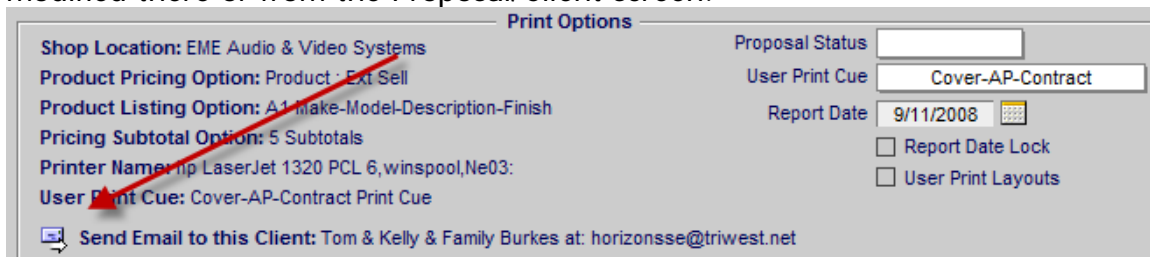


You can set the Labor Percentage of Equipment Default in the Master Prefs/Other/Proposals screen for all new proposals or in the Proposal/Pricing/Labor Rates screen from within a specific proposal.



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.

Clear All Proposal Area Text

Proposal - Area Text ? Home

Tom & Kelly & Family Burkes
Sunbelt Business Brokers
Whole House Music System
1269.1-1.100

Done

Areas	Products	Text
Labor	Parts	Wire
Tasks		
Pick	1 - Pick Area	2 - Pick Text Category
<ul style="list-style-type: none"> Zone 1 - Home Theater Zone 2 - Living Room Zone 3 - Office Zone 4 - Dining Room Zone 4 - Kitchen Zone 5 - Master Bedroom Zone 5 - Master Bathroom 	<ul style="list-style-type: none"> Audio Category Commercial Sound Control Installations Jacks Racks Rooms Security Systems Vacuum Video 	<ul style="list-style-type: none"> 3 - Pick Video Text Camera Theater design Theater equipment Theater linn active TV - front projection TV- monitor television TV - rear projection
CO	Products in: Zone 1 - Home Theater	Text for: Zone 1 - Home Theater
<ul style="list-style-type: none"> Linn : 5125 Linn : Katan Linn : Melodik Runco : CL-610 Sony : DVP-NS999ES Linn : 5101 Personal Hardest 	<p>ABC ✓</p> <p>This area includes the following products and features.</p> <p>The design goal of this home theater is to recreate the movie theater sound to broadcast standards, so the artistic values of the movie director will be faithfully reproduced. this audio and video system will also blend in harmoniously with the decor of your home. eme is a licensed thx home theater designer. the thx surround sound system was developed by film director george lucas. mr. lucas was the director of star wars and the producer of the indiana jones movies. most of the action movies created today have been edited and scored at the lucasfilm movie studio called the skywalker ranch in northern california.</p>	<p>Add to Library</p>

Proposal - Add Text to Text Library

Mike Hammerstad

Whole House Music System
1269.1-1.100

Text Category: Commercial Sound

Text Title: Commercial Music System

ABC ✓

Text Body for Text Library
Changing this Text will not affect your Proposal

Home music systems require careful design and installation to achieve their maximum hi-fidelity potential. music is the communication of emotion. a great stereo must sound pleasant and be emotionally involving. to achieve this care must be taken in matching and tuning each component so that the whole system will perform in harmony with the music. frequency response, sound pressure levels, imagery, tonal balance and distortion are a few of the parameters that are taken into consideration and adjusted for maximum performance.

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.

Master Prefs - Users

Users must have a Location (2 char max), First Name, Employee Number (3 char max) and Password

Users | **Network**

Add User

Location DeActivate ReAssign

	Last Name	First Name	Initials	Employee Number	Title
1	Dowling	Dave	SR	51	Sales Specialist
	Phone Ext	Mobile #	715-234-5986	Email	
1	Engandela	Jim	JE	100	President
	Phone Ext	124	Mobile #	715-287-3335	Email

Master Prefs - InActive Users

InActive Users no longer show in the Log in screen

InActive Users

Location ReActivate ReAssign

	Last Name	First Name	Initials	Employee Number	Title
1	Oster	Jon	JO	45	Sales Manager
	Phone Ext	Mobile #		Email	

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.

Master Prefs - Users

Users must have a Location (2 char max), First Name, Employee Number (3 char max) and Password

Users | **Network**

Add User

Location DeActivate ReAssign

	Last Name	First Name	Initials	Employee Number	Title
1	Dowling	Dave	SR	51	Sales Specialist
	Phone Ext	Mobile #	715-234-5986	Email	
1	Engandela	Jim	JE	100	President
	Phone Ext	124	Mobile #	715-287-3335	Email

Select Another User

User

Title

2773 Dave Dowling
122 Jim Engandela
 119 Joel Roberts
 2937 Sandy Engandela

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.

Proposals

View	Status	Number	User	Client	Company	Proposal Title	Created	Total	Fav	Up
<input type="checkbox"/>	●	1267.1-2.101	Engandela, Sandy		Home Entertainment	8/6/2008	\$0		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	●	1258.1-1.100			Home Entertainment	6/27/2006	\$62,166		<input type="checkbox"/>	<input type="checkbox"/>

Enhancement – Project/Purchase Orders: Add Receiving space

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

PO Number
1080

**EME Audio & Video Systems
Purchase Order**

PO Date
8/29/2008

Vendor: Sony Inc
1 Sony Way
Osaka, CA 45566

Account #:

Phone: (W) 387-498-5857 Fax: 387-498-5857

email:

Project: Mike & Jessica Potter

Terms: **Shipping:** Best Way

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

Phone: Fax: 715-287-4464

email: horizon@triwest.net

Project Reference: 1285.1-1.100 **Buyer:** Joe Buyer

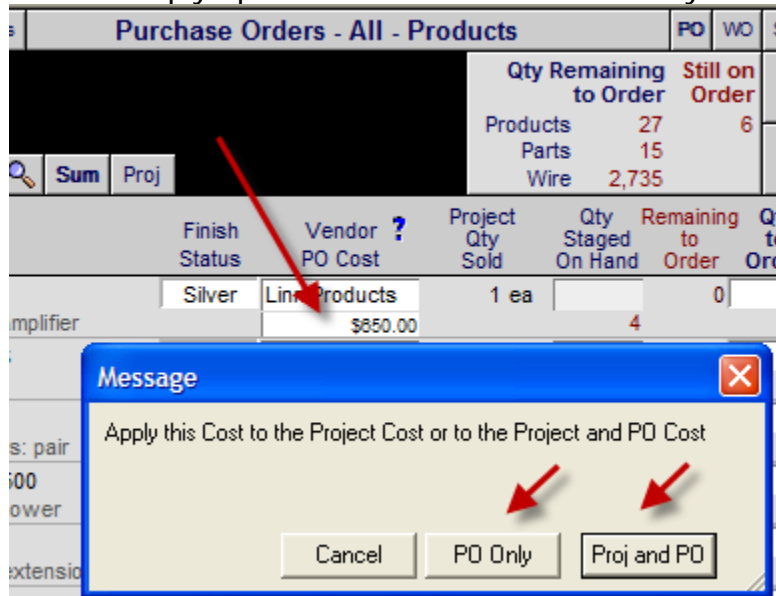
Special Instructions:

Rcvd	Order	Make	Model	Finish	Cost	Ext Cost
	1 ea	Sony	DVP-NS999ES	Black	620.40	620.40
Progressive Scan DVD Player						

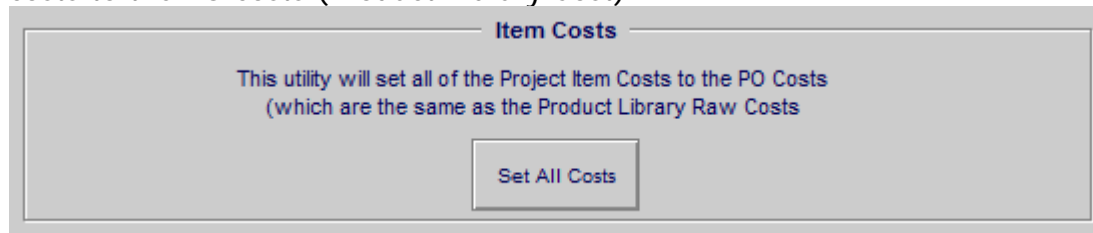
Enhancement – Project/Purchase Order/PO Costs:

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.

Delete Product **Product Library - Product Group Utility** 1 of 4819 ? Home

Linn
5101 Personal Handset
Audio : Amplifier : Preamplifier
 Universal learning remote

Done

Prev Next

Classification	Discipline	Category	Type	Class	Phase
Product	Audio	Amplifier	Integrated Amplifier	Product	3 Final
	Audio	Amplifier	Multi-channel	Product	3 Final
	Audio	Amplifier	Preamplifier	Product	3 Final
	Audio	Amplifier	Single Channel	Product	3 Final
	Audio	Amplifier	Small Amp	Product	3 Final
	Audio	Amplifier	Stereo	Product	3 Final
	Audio	Amplifier	Stereo Receiver	Product	3 Final
	Audio	Amplifier	Surround Processor	Product	3 Final
	Audio	Amplifier	Surround Receiver	Product	3 Final
	Audio	Control	Multi-channel	Product	3 Final
	Audio	Misc	Final Part	Part	3 Final
	Audio	Misc	Prewire Part	Part	1 Prewire

Primary Install Phase
 3 Final

Primary Install Phase Product Override
☐

Favorite ☐

Group Navigator
 Show All Disciplines
 Select a Discipline
 Up First
 Down Last
 First Group 1
 Go to Last Selection
 Use Last Selection
 Edit Product Groups

Enhancement – Contact: Info button more info

More information has been added to the Contact Info Pop Up

Contact Library - List View Utility ? Home

J K L M N O P Q R S T U V W X Y Z

EME audio & video 4141 of 4141 Contacts More Views Leave Print Menu

Current User: Jim Engandela

Company	Category	Fav Phone	Info Fav
ABT Electronics	CPS User	(0) 847-544-2995	Info Fav

Fav Current Address

Anthony Adragna
 Joseph P Day
 14 Romeo Ln
 Commack, NY 11725

(Prime Phone) (W) 212-685-4156

(Work Phone) 212-685-4156
 (Home Phone)
 (Mobile Phone)
 (Fax)

(Category) Prospect
 (Class) CPS Prospect
 (Group) HomeTechPro
 (Key)
 (Status)

OK

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%.

User Access Rights		Sort Users	◀ Prev/Next ▶	?	Home
Jim Engandela President		Screen Magnification <input type="text" value="100%"/> Set the size of the SCPS window according to your screen resolution			Done
					Commissions

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.

POS - Quotation		Print Setup	◀ ▶	?	Home
Quotation QT #7190 1 of 22		Costing	Done		
		Set Up	◀ Prev Next ▶		

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.

Proposal - Product Wire & Cable Supplements										1 of 1	?	Home
Areas		Products		Text		Joel Roberts Evolution 1268.1-1.100 Linn : KNEKT RCU Automation : Control : Keypad				Done Prev Next		
Labor		Parts		Wire		Tasks						
Product		Specs		Pix - PDF's		Labor		Parts		Wire		
Make		Model		Wire & Cable								
<input type="text"/>		<input type="text"/>		Add <i>Only products classified as "Wire" can be added Wire & Cable are Itemized</i>								
Class	Bulk Run	Type	No Labor	Qty	Wire Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell	
Bulk	Home			150 ft	Linn	Bulk Analog interconnect	Analog interconnect	1	2.81	4.25	637.50	
Bulk	Home			150 ft	Linn	Bulk Analog interconnect	Analog interconnect	1	2.81	4.25	637.50	
Pre-Cut				1 pr	Linn	Black Interconnect	Pair of phono-phono	3	79.20	120.00	120.00	
Pre-Cut				1 pr	Linn	Black Interconnect	Pair of phono-phono	3	79.20	120.00	120.00	

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.

Product Pictures

[Show](#) ☒ All ☐ Areas & Products Report
☐ None ☐ Product Summary Report (recommended)

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.

Fav Address

☒ Address 1: 567 58TH Street
 Cross Street
 City Oakland
 State CA Zip: 94607
 County
 Country

☐ Address 2: 228 Crossroads Blvd.
 Cross Street
 City Carmel
 State CA Zip: 93923
 County
 Country

Copy 1>2

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.

Master Project - Change Orders		Print	?	Home
John & Mary Smith		Master Project		
Home Entertainment System 1284.1-1.100		Project List		
Current Change Orders				

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.

Author	Creation Date	Action Taken
Jim Engandela	9/9/2008 8:02:53 AM	

Fix – Proposal/Utility/Admin: Global Proposals

Global Proposal Selection has been added back into the Proposal Utility screen.

☒ Show this Proposal for All Users

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.

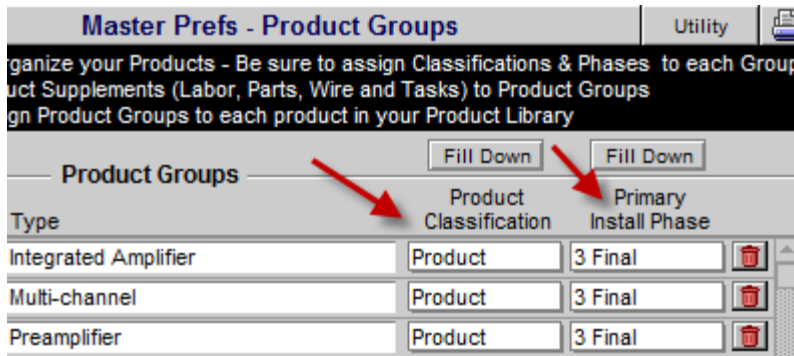
All AlphaFinder bars, on all modules, are now placed below the Header bar. This gives better clarity and faster usage of the AlphaFinder.

Find Proposals				Fav A B C			Proposals															Sort					Print		? Home																								
All		A		B		C		D		E		F		G		H		I		J		K		L		M		N		O		P		Q		R		S		T		U		V		W		X		Y		Z	
Administrator		New Proposal																											3 Proposals		Leave																						
Manager																													Archived Proposals		Projects																						
User																													= Global Proposal		Current User: Jim Engandela - Administrator																						
View		Status		Number		User		Client		Company		Proposal Title		Created		Total		Fav		Dup		Arch																															
				1290.1-1.100				Smith, John & Mary				Home Entertainment		7/3/2008		\$29,840																																					
				1269.1-1.100				Hammerstad, Mike				Whole House Music		9/12/2006		\$67,841																																					
				1267.1-1.100				Engandela, Jim		Horizon Software		Home Entertainment		9/11/2006		\$53,578		A																																			

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.

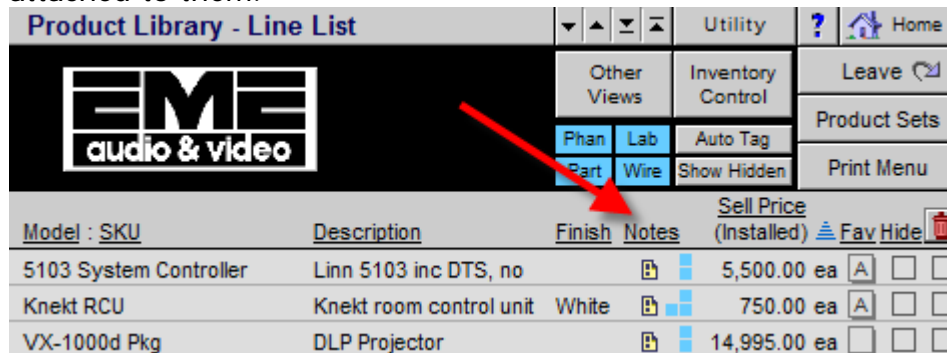
Enhancement – Contact Module: Improved GUI Layout

All Contact screen layouts have been improved for better clarity.

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 – Product Library: Add Notes header label

Clicking on the underlined Notes Header Label finds all Products that have a Note attached to them.



Product Library - Line List

EME audio & video

Utility ? Home

Other Views Inventory Control

Phan Lab Auto Tag

Part Wire Show Hidden

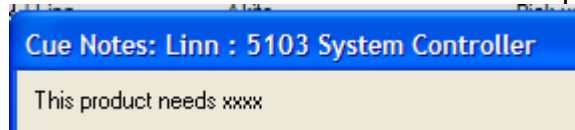
Product Sets

Print Menu

Model : SKU	Description	Finish	Notes	Sell Price (Installed)	Fav	Hide	
5103 System Controller	Linn 5103 inc DTS, no			5,500.00 ea	A		
Knekt RCU	Knekt room control unit	White		750.00 ea	A		
VX-1000d Pkg	DLP Projector			14,995.00 ea			

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.

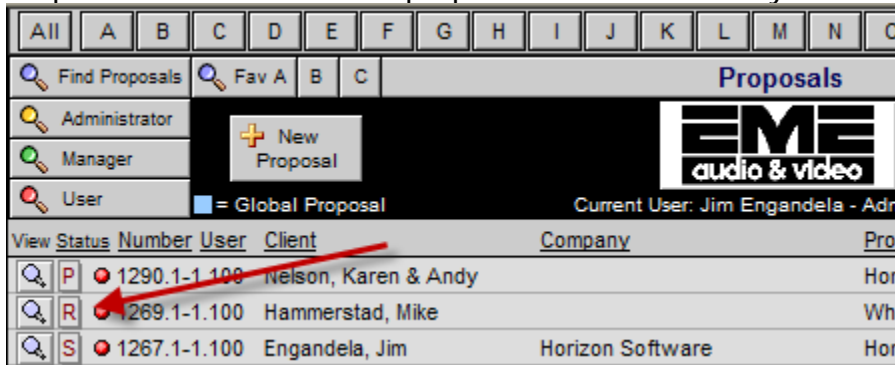


Enhancement – Proposal List: Proposal Status Flag

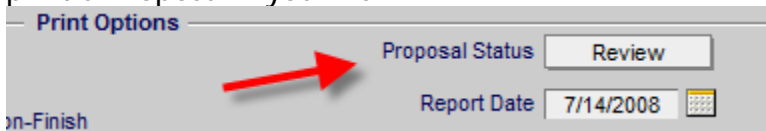
You can now set a Status flag on your proposals to indicate the status of each Proposal. Status: P = Progress, R = Review, S = Sent.

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.

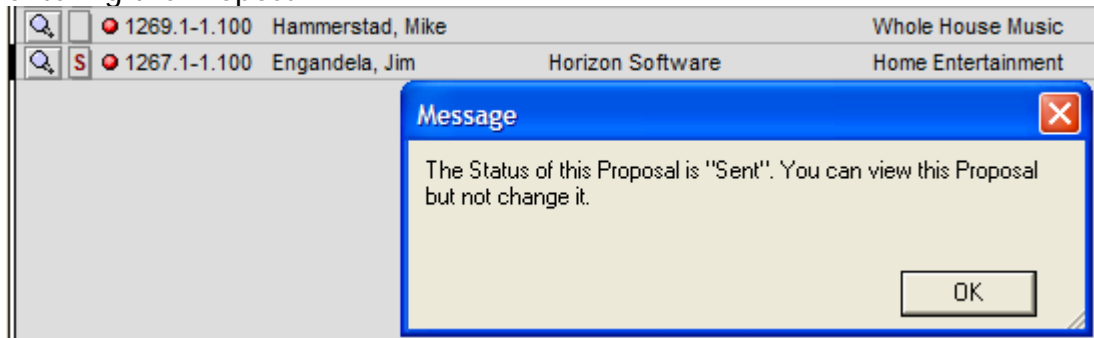
By clicking on the underlined Status header your proposal will be sorted in that order with the blank ones sorted at the bottom. You can also use the Find Proposal button and find all proposals with the status you desire.



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

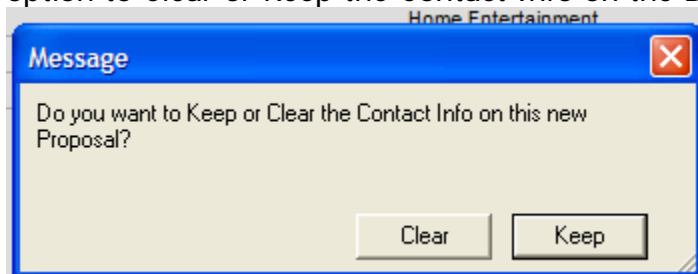


When the Proposal Status flag is set to "Sent" this message will pop up when entering the Proposal.



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.



HOME ENTERTAINMENT SYSTEM
Version 1

Designed and Prepared for

Burkes
Sunbelt Business Brokers
567 58TH Street
Oakland, CA 94607



By

Jim Engandela
President

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.



Master Prefs - Other - Products 1

Products 1 | Products 2 | Counters | Misc | 3rd Party | Graphics

Product Library

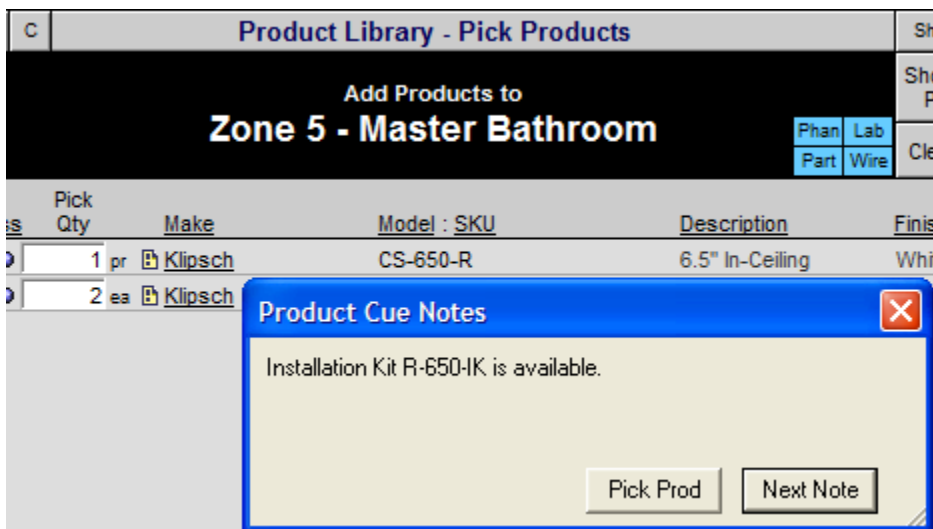
Sort Product Library from Logo Screen ☐ Yes ☒ No (No Sort recommended)

☐ Have the AlphaFinder only show Products, not Parts or Wire

☐ Go to Product Override Labor screen, instead of Group Labor screen

☐ Display CPS Labor and Status amounts on Product Detail List screen

☒ When Picking Products & Sets into Proposals, Force Show Product Cue Notes



Product Library - Pick Products

Add Products to
Zone 5 - Master Bathroom

Phan Lab
Part Wire

Pick	Qty	Make	Model : SKU	Description	Finis
1	pr	Klipsch	CS-650-R	6.5" In-Ceiling	Whit
2	ea	Klipsch			

Product Cue Notes

Installation Kit R-650-IK is available.

Pick Prod Next Note

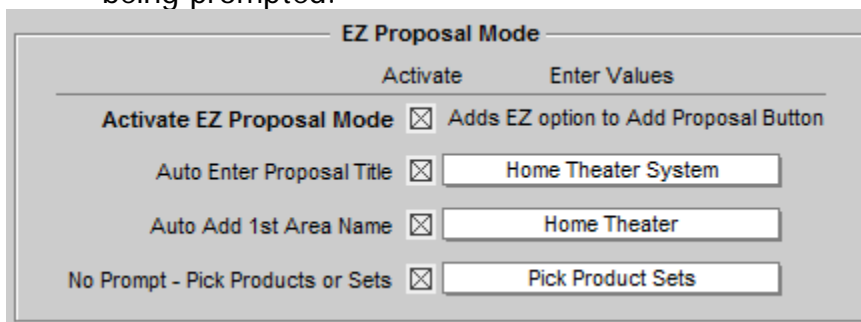
Enhancement – Proposal/EZ Proposal Mode

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.

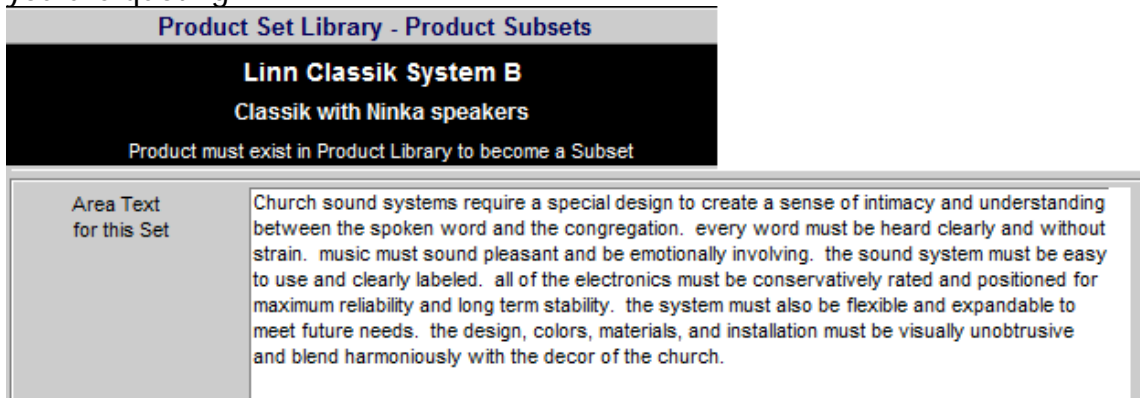


Enhancement – Proposal/Pick Sets with Area Text

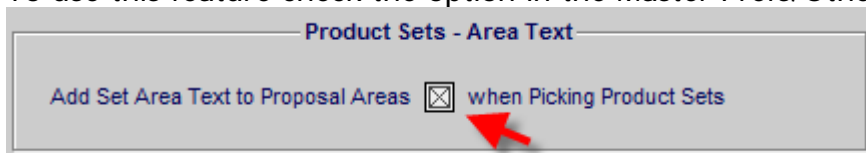
You can now add Area Text to your Product Sets, on the Set Detail screen in your Product Set Library.

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.

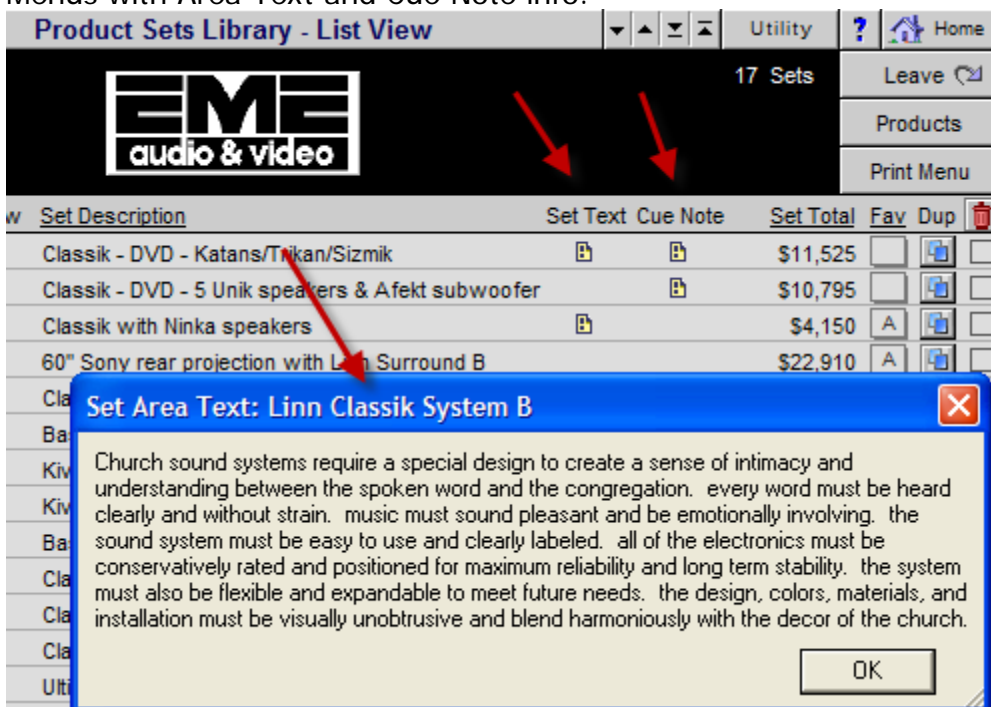
This Area Text will then Print on your Proposal reports to describe the Products you are quoting.



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

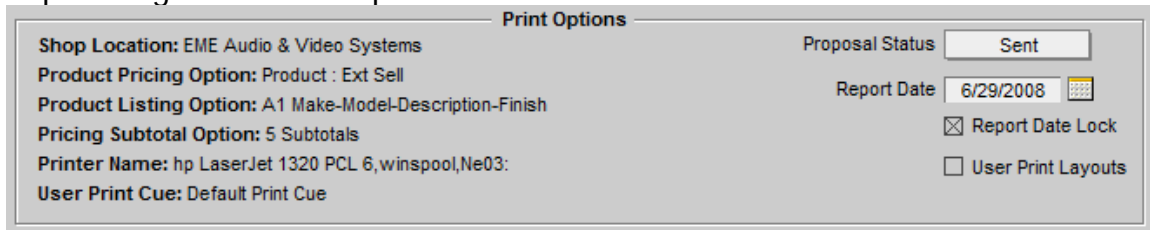


Clicking on the Area Text and Cue Note Icons, in the Sets Library will Pop Up Menus with Area Text and Cue Note info.



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.



Print Options

Shop Location: EME Audio & Video Systems

Product Pricing Option: Product : Ext Sell

Product Listing Option: A1 Make-Model-Description-Finish

Pricing Subtotal Option: 5 Subtotals

Printer Name: hp LaserJet 1320 PCL 6,winspool,Ne03:

User Print Cue: Default Print Cue

Proposal Status:

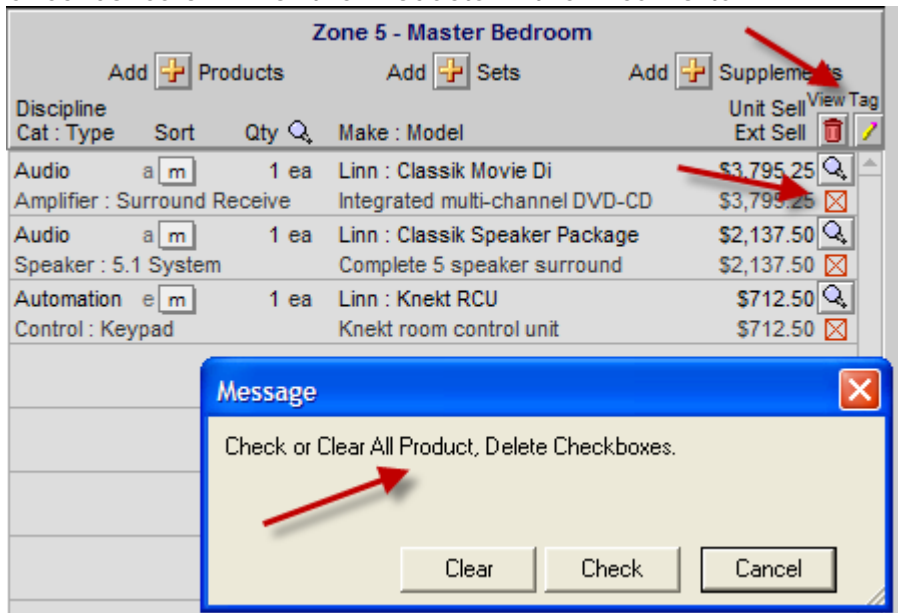
Report Date: 6/29/2008

☒ Report Date Lock

☐ User Print Layouts

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.



Zone 5 - Master Bedroom

Add Products Add Sets Add Supplements

Discipline	Cat : Type	Sort	Qty	Make : Model	Unit Sell	Ext Sell	View Tag
Audio	a	m	1 ea	Linn : Classik Movie Di	\$3,795.25	\$3,795.25	
Amplifier : Surround Receive				Integrated multi-channel DVD-CD	\$3,795.25	\$3,795.25	
Audio	a	m	1 ea	Linn : Classik Speaker Package	\$2,137.50	\$2,137.50	
Speaker : 5.1 System				Complete 5 speaker surround	\$2,137.50	\$2,137.50	
Automation	e	m	1 ea	Linn : Knekt RCU	\$712.50	\$712.50	
Control : Keypad				Knekt room control unit	\$712.50	\$712.50	


Message

Check or Clear All Product, Delete Checkboxes.

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

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

Proposal-Project Info Update

Proposal Due Date 9/26/2007 

Project Reference

Blueprint Reference

Where did you hear?

Client Referred By

Client Referral

Website

email

Print Advertizing

Radio Advertizing

TV Advertizing

Direct Mail

Drive By


Other...

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


Product Summary

 Product Summary
by Discipline with Totals

Shop Report

Product Summaries

 Product Summary by Phase
Products/Supps/Labor

 Product Summary by Discipline
with Subtotals and Grand Totals

7/3/2008

EME Audio & Video Systems - Confidential Report

Product Summary by Discipline with Totals

Page 1

John & Mary Smith
Home Entertainment System
1290.1-1.100

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 loudspeakers: 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.


Proposal Utility - Export
John & Mary Smith

Home Entertainment System
1290.1-1.100

Proposal Export Admin


 **Impact GraphicsDraw! Data Export** - Help guides are on the GraphicsDraw screen.
Example of file name produced. GD_OrgChart_1296.1-1.100.tab

 **Export Proposal Data - Discipline**
 **Export Proposal Data - Discipline** This utility will export this Proposal/Project and let you name the file.
 **Export Proposal Data - Discipline**

 **Tyler - Export this Proposal**
This utility will export this project and save it in your SCPS folder as a .dbf or .tab file
Example of file name produced. TylerProjectDataExport.tab

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.

Alt Billing **Original Project - Client Info**  Print

Mike & Jessica Potter
Home Theater System
1285.1-1.100


Created 9/12/2006
Modified 8/28/2008
Sold 9/12/2006
Completed

Client Details Project **Contacts** Com Log

Modify Client Modify or Switch Contact  Numbers

Prefix First Name Mike & Jessica
Last Name Potter
Company

Address
Address 1: 567 58TH Street
Cross Street

Message 

This is a Project or a Finalized Change Order so this Contact can be Modified, but only Switched by Users with Administration Rights.

OK

Enhancement – Projects/Client: Switching Tax Rate by Administrators

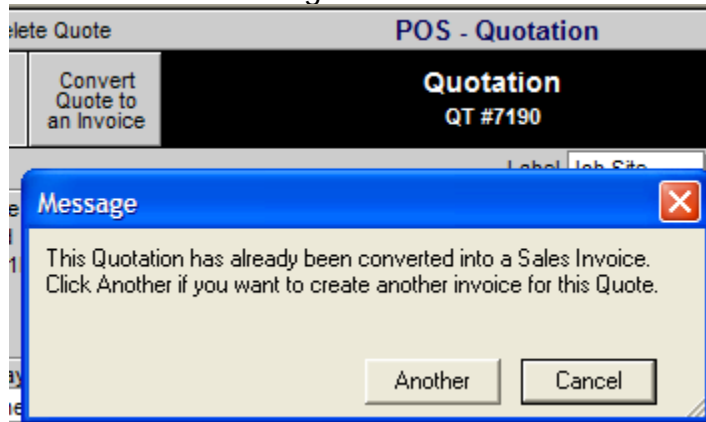
Users with Administrator rights can now Switch Tax Rates in a Project. All users can still Modify Contacts in a Proposal.

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.

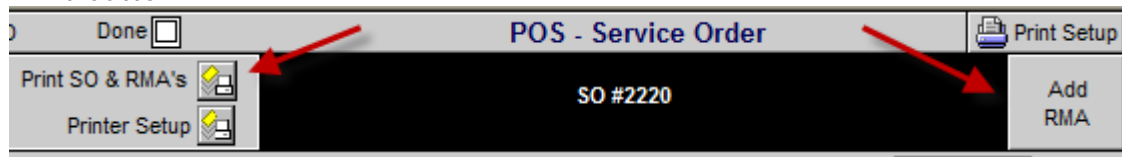
Enhancement – POS/Quotation: Create another Sales Invoice

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.

POS - Service Order - RMA

SO #2220.1

Original SO SO #2220

Return to Original SO

Done

Print Preview Printer Setup

Today's Date 7/1/2008

Created Date

Alex Mestechkin
24 Thornridge Avenue
Thornhill, ONT. L4J1C5
Canada

Label JOB SITE: Show Hide

Alex Mestechkin

Make Yamaha

Model RX3738

Serial Number 4698237

Description of Problem Amplifier shuts down after 5 minutes

Sent To Yamaha Factory

Sent Method UPS

RMA RA Number 64849

Item Returned ☒ Yes ☐ No Returned Date 9-1-2008

Shipping Charge \$24.00

Repair Charge \$150.00

Shop Representative Dave Dowling

Advanced Exchange ☒ Yes ☐ No

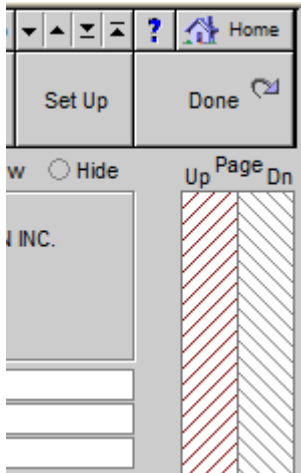
Item Warranty ☐ Yes ☒ No

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.

Find Service Order		POS - Service Order List					
Service Order Archive		Click on Service Order to view					
View	# # Invoice	RMA	Client	Company	RMA RA #	RMA Sent To	Date
	SO #2220		Mestechkin, Alex				5/12/1998
	SO #2220.1	RMA	Mestechkin, Alex		64849	Yamah	7/1/2008
	SO #2534		Steinberg, Randy				7/5/1999
	SO #2632		Laren, David & Sally				10/13/1999

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.

RCMS Utility - Post SCPS Project to RCMS								
1317.1-1.100								Done
Set the Order Location and Deliver Locations if necessary								Post to RCMS
								Cancel
Order Location	Deliver Location	Request Hold	Classification	Phase	Qty Make	Model	Description	
01	07	<input checked="" type="checkbox"/>	Product	3	1 Aragon	2007SIL	Amplifier	<input type="checkbox"/>
01	07	<input type="checkbox"/>	Product	3	1 B&K	AV260019	Amplifier	<input type="checkbox"/>
01	07	<input type="checkbox"/>	Bulk Wire & Cable	3	150 Monster Cable	HDS142RCL500	20166800	<input type="checkbox"/>

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.

Proposal - Wire & Cable Manager		Wire Chart	Wire Labels	?	Home
Mr. Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100		Auto Set Bulk Wire Room Run Lengths 110% % Set		Done	
				Set Wire ID's	

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.

Proposal - Wire & Cable Manager		Wire Chart	Wire Labels	?	Home
Joel Roberts Home Entertainment System 1291.1-1.100		Auto Set Bulk Wire Room Run Lengths 100 % Set		Done	
				Set Wire ID's	
Wire & Cable Supplements					
<input type="checkbox"/> Sort By Class	Bulk Run	Wire	Wire & Cable	150 feet per Home Run	
add/edit	Product Qty	Type	Make : Model	75 feet per Room Run	
set	Bulk	Room	150 m	Linn : K10 Cable	Wire ID
	1			Loudspeaker cable	

Programming	T T	3	\$80.00	0:33:00	\$44.00	<input type="checkbox"/>
Calibration	T T	3	\$100.00	0:22:00	\$36.67	<input type="checkbox"/>
Parts Labor	T T	3	\$50.00	0:18:09	\$15.13	<input type="checkbox"/>
Wire Labor - Bulk	T T	1	\$60.00	1:22:30	\$82.50	<input type="checkbox"/>

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

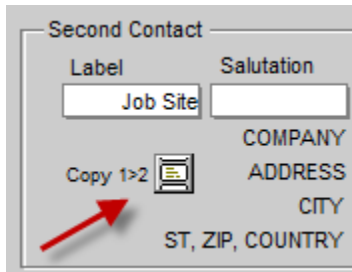
Under some circumstances all of the Staple up card were being printed regardless if the "Issue Staple Up Cards" checkbox was checked on the Product or not. This has been corrected.

Fix – Project/Wire Supplements/View Only

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

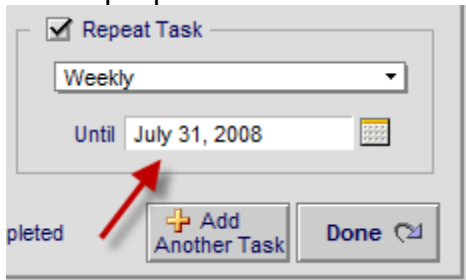
Fix – POS/Invoice/Setup: Fix Copy Address 1 to Address 2

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



Fix – Master Tracker/New Task: Pop Up Date Calendar

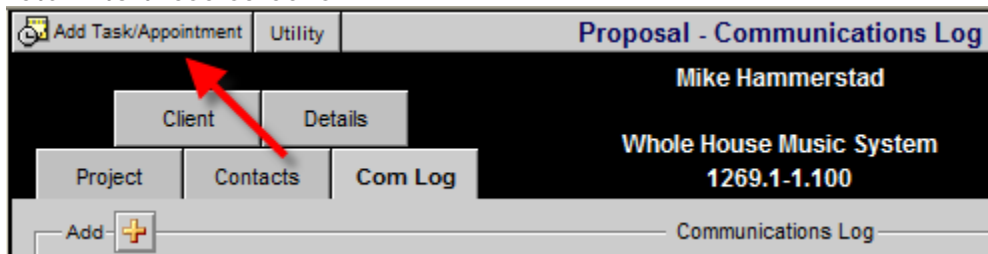
The Pop Up Calendar for New Tasks now works properly.



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.

Purchase Order QuickBooks Link

Delete PO Post PO Pick Vendor Vendor Address Ship To Address Pick Ship To Hide Prices

PO Number 1080 - 1285.1-1.100 User PO # PO Date 5/29/2008 Posted Date 5/29/2008

Preview PO Done

Auto Receive All PO Items 3 Print & Post PO

1 Open QuickBooks Quickbooks Pro must be on this computer QuickBooks PO # 19

2 Query Vendors Linn Transaction Date 05/29/2008

QB Message - PO Notes Link Utility 4 Post to QuickBooks

5 Close Link

PO Shipping Method Best Way PO Total \$1,791.00

Buyer Override Buyer Joe Buyer

PO Terms

Qty Ordered	Make	Model Description	Purchase Order SKU	Finish	Unit Raw Cost	Extended Raw Cost
3 pr	Linn	Katan		Black	\$597.00	\$1,791.00
Bookshelf loudspeakers: pair						

Note:

Receiving

Date Received Received By

Receive Qty Recvd Qty Open

View-Edit

Receive 0 3 pr

Rcv'd: 5/30/2008 By: Qty:

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.

Purchase Order QuickBooks Link

Delete PO Post PO Pick Vendor Vendor Address Ship To Address Pick Ship To Hide Prices

PO Number 1081 - 1285.1-1.100 User PO # 3982 PO Date 5/24/2008 Posted Date 5/24/2008

Preview PO Done

Auto Receive All PO Items 3 Print & Post PO

1 Open QuickBooks Quickbooks Pro must be on this comp

2 Query Vendors Sonance

QB Vendor Message - PO Notes teest

PO Shipping Best Way

Buyer Override

PO Terms

Qty Ordered Make Model Description Purchase Order SKU

1 ea Linn 5125

Vendor Info

Sonance
212 Avenida Fabricante
San Clemente, CA 92672-7531

Phone: (W) 555-463-2983
Fax: 800-582-0772
email: email@sonance

OK

PO Number 3982 **EME Audio & Video Systems** PO Date 5/24/2008

Purchase Order

Vendor:	Account #:
Sonance	
212 Avenida Fabricante	
San Clemente, CA 92672-7531	
Phone (W) 555-463-2983	Fax 800-582-0772
email email@sonance	
Project Mike & Jessica Potter	

Ship to:
EME Audio & Video Systems
100 Purchasing Lane
Purchasing City, WI 567937
Phone (W) 715-287-3335
Fax 715-287-4464
email horizon@triwest.net2
Project Reference 1285.1-1.100
Buyer Joe Buyer

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.

Ship To Address	Pick Ship To	Hide Prices
EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937	Preview PO	Done
	Auto Receive All PO Items	3 Print & Post PO

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.

Accounts must exist in QB Service based = blank Inventory based = fill in	<table><tr><td></td><td>QB Account Name</td><td>Examples</td></tr><tr><td>Sales (Income)</td><td>Sales</td><td>Sales</td></tr><tr><td>Inventory (Asset Account)</td><td>Inventory</td><td>Inventory</td></tr><tr><td>COGS (Cost of Goods)</td><td>Cost of Goods Sold</td><td>Purchases</td></tr><tr><td>Sales Tax Account</td><td>SCPS Sales Tax</td><td>SCPS Sales Tax</td></tr><tr><td>Do not use</td><td></td><td>SCPS Sales Tax</td></tr></table>		QB Account Name	Examples	Sales (Income)	Sales	Sales	Inventory (Asset Account)	Inventory	Inventory	COGS (Cost of Goods)	Cost of Goods Sold	Purchases	Sales Tax Account	SCPS Sales Tax	SCPS Sales Tax	Do not use		SCPS Sales Tax	<table><tr><td>Enable Project to QB Estimate</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Change Sell Price to Cost plus Markup in QB Estimate</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Enable Purchase Order to QB</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Use SCPS Vendor Info in QB</td><td><input checked="" type="checkbox"/></td></tr></table>	Enable Project to QB Estimate	<input checked="" type="checkbox"/>	Change Sell Price to Cost plus Markup in QB Estimate	<input checked="" type="checkbox"/>	Enable Purchase Order to QB	<input checked="" type="checkbox"/>	Use SCPS Vendor Info in QB	<input checked="" type="checkbox"/>
	QB Account Name	Examples																										
Sales (Income)	Sales	Sales																										
Inventory (Asset Account)	Inventory	Inventory																										
COGS (Cost of Goods)	Cost of Goods Sold	Purchases																										
Sales Tax Account	SCPS Sales Tax	SCPS Sales Tax																										
Do not use		SCPS Sales Tax																										
Enable Project to QB Estimate	<input checked="" type="checkbox"/>																											
Change Sell Price to Cost plus Markup in QB Estimate	<input checked="" type="checkbox"/>																											
Enable Purchase Order to QB	<input checked="" type="checkbox"/>																											
Use SCPS Vendor Info in QB	<input checked="" type="checkbox"/>																											
Create QB Tax Account Type = "Service" QB Canadian Tax Accounts <input type="checkbox"/>																												

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.

Zone 1 - Home Theater					
Add Products		Add Sets		Add Supplements	
Discipline	Sort	Qty	Make : Model	Unit Sell	View
Cat : Type				Ext Sell	
Audio	a [m]	1 ea	Linn : 5125	\$2,612.50	
Amplifier : Multi-channel			Five channel power amplifier	\$2,612.50	
Audio	a [m]	5 pr	Linn : Katan	\$945.25	
Speaker : Bookshelf			Bookshelf loudspeakers: pair	\$4,726.25	

Wire Supplements				
edit Class	Sort Bulk	No	Total	Wire & Cable
	Type	Labor	Qty	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				Proposal - Wire Supplements					Wire Summary		Wire Detail		? Home		
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		
Areas		Products		Text									Wire Manager		
Labor		Parts		Wire		Tasks									
All Areas				Wire Supplements					Wire Total				\$8,432.90		
Wire assigned to		Zone - Area		Qty	Make : Model	add/edit Class	Sort <input type="checkbox"/>	Bulk <input type="checkbox"/>	No Labor	Total Qty	Wire & Cable Make : Model	Tax A B	Install Phase	Unit Sell	Ext Sell
1 - Home Theater		1 Linn : S101 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	Qty	Qty	
View-Edit	Recvd	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	\$120.00
			4 - Dining Room	
Bulk	150 ft	Monster : CAT5 Bulk Linn : Knekt RCU	\$0.80	\$120.00
			4 - Kitchen	
Bulk	150 ft	Monster : CAT5 Bulk Linn : Knekt RCU	\$0.80	\$120.00
			5 - Master Bedroom	
Bulk	150 ft	Monster : CAT5 Bulk Linn : Knekt RCU	\$0.80	\$120.00
			3 - Office	
Pre-Cut	1 pr	Linn : Black Interconnect Linn : 5125	\$120.00	\$120.00
			1 - Home Theater	
Pre-Cut	1 pr	Linn : Black Interconnect Linn : 5125	\$120.00	\$120.00
			1 - Home Theater	
Pre-Cut	1 pr	Linn : Black Interconnect Linn : 5125	\$120.00	\$120.00
			1 - Home Theater	

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.

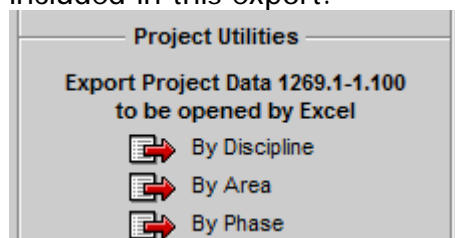
Proposal - Wire Supplements	Wire Summary	Wire Detail	?	Home
Mr. Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100	Wire & Cable are Itemized 150 feet per Home Run 75 feet per Room Run	Done	Wire Manager	

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

When leaving the 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.

Master Prefs - Labor Rates

Labor Matrix | **Labor Rates** | Labor DOD

If you change the Labor Types you should click on the Update Labor Types button

Done

Labor Types	Default Hourly Rates 1		Hourly Rates 2		Hourly Rates 3	
	Label	Basic Rate	Label	Inner City Rate	Label	Prewire only
	Cost	Sell	Cost	Sell	Cost	Sell
1 - Installation	\$30	\$60	\$40	\$80	\$15	\$30
2 - Programming	\$40	\$80	\$50	\$100	\$15	\$30
3 - Training	\$50	\$100	\$60	\$120	\$15	\$25

Update Labor Types on All Product Groups

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

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

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.

Canada GST Tax Account: SCPS Sales Tax SCPS Sales Tax

Canada PST Tax Account: SCPS Sales Tax SCPS Sales Tax

Enable QB Canadian Tax Accounts ☒

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

		SubTotal	\$3,980.00
Tax GST A	\$218.90	Tax	\$218.90
Tax PST B	\$0.00	Invoice Total	\$4,198.90

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.

Copy Statistics	Master Preferences - SCPS Statistics
Send Statistics to Horizon	
EME Audio & Video Systems - "Status Report 5/12/2008	
SCPS Version: 6.7v2	
Network Licenses: 1	
Subscription Days Left: 90	

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.

 Add Task/Appointment		Proposal Tracker - Milestones & Tasks				Date Create
Joel Roberts						
Cue Days are based on the Proposal due date				1292.1-1.100		
 Update: 5/17/2008		 Proposal Due Date		Proposal Milestones & Tasks		
Hide	Done	Done Date	Due Date	Type	Task Name	Description 
<input type="checkbox"/>	<input type="checkbox"/>		5/2/2008	 Task - Discovery	Client Profile	Interview client & complete client
<input type="checkbox"/>	<input checked="" type="checkbox"/>	5/7/2008	5/7/2008	 Task - Discovery	Walk Through	Gather project details
<input type="checkbox"/>	<input checked="" type="checkbox"/>	5/7/2008	5/9/2008	 Task - Review	Design & Engineering	Review client profile with
<input type="checkbox"/>	<input type="checkbox"/>		5/10/2008	 Task - Followup	Send letter to Client	Send Post interview letter to client
<input type="checkbox"/>	<input type="checkbox"/>		5/15/2008	 Task - Review	Sales Review	Review client profile with Sales
<input type="checkbox"/>	<input type="checkbox"/>		5/19/2008	 Task - Followup	Send letter to Client	Post proposal letter
<input checked="" type="checkbox"/>						

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.

Zone 4 - Dining Room

Add  Products

Add  Sets

Add  Supplements

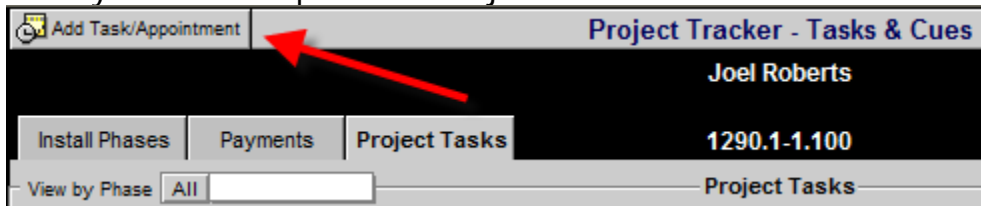
Discipline	Cat	Type	Sort	Qty	Make	Model	Unit Sell	Ext Sell	View
Audio	a	m		1 pr	Linn	Diskreet-Rd	\$345.00		
Speaker : In-wall					In-wall loudspeakers - Round		\$345.00		
Automation	e	m		1 ea	Linn	Knekt RCU	\$750.00		
Control : Keypad					Knekt room control unit		\$750.00		

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.



Add Task/Appointment		Project Tracker - Tasks & Cues	
		Joel Roberts	
Install Phases	Payments	Project Tasks	1290.1-1.100
View by Phase All		Project Tasks	

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.

Tax Status by Subtotal

	A Tax Rate	B Tax Rate
Products	<input type="text" value="T Taxable"/>	<input type="text" value="T Taxable"/>
Labor	<input type="text" value="T Taxable"/>	<input type="text" value="T Taxable"/>
Misc Parts	<input type="text" value="T Taxable"/>	<input type="text" value="T Taxable"/>
Bulk Wire & Cable	<input type="text" value="T Taxable"/>	<input type="text" value="T Taxable"/>
Pre-Cut Wire & Cable	<input type="text" value="T Taxable"/>	<input type="text" value="T Taxable"/>

Message ✕

Select a Tax Setting

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.

Message ✕

Do you want the CO Payments to use the Master Project Payments or use the Master Prefs CO default Payments?

Master Preferences/Change Order – Default Payment Steps

Change Order - Default Payment Steps						
	Deposit	Payment 1	Payment 2	Payment 3	Holdback	
Label:	<input type="text" value="Deposit"/>	<input type="text" value="Payment 1"/>	<input type="text" value="Payment 2"/>	<input type="text" value="Payment 3"/>	<input type="text" value="Holdback"/>	Total must equal 100%
	<input type="text" value="0"/> %	<input type="text" value="40"/> %	<input type="text" value="30"/> %	<input type="text" value="30"/> %	<input type="text" value="0"/> %	
Terms:	<input type="text"/>	<input type="text" value="Due 10 days"/>	<input type="text" value="Due 10 days"/>	<input type="text" value="Due 10 days"/>	<input type="text"/>	100 %

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.

Clear Payment Amounts		Pending Change Order - Payment Terms	
Set Payments to Default CO Terms		Mr. Jim Engandela Horizon Software	
Installation Type		Home Entertainment System	
New-2 Phase Pre-Trim		1267.1c2-1.100	

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.

Purchase Order Detail Not Posted				Setup	Prev/Next	?
Delete PO	Post PO	Pick Vendor	Vendor Address	Ship To Address	Pick Ship To	Hide Prices
PO Number 1088 - 1290.1-1.100		Sonance 212 Avenida Fabricante San Clemente, CA 92672-7531 Phone: (H) 800-582-7777 Fax: 800-582-0772		Horizon Software S. 15700 Hwy U. Strum, WI 54770 Phone: (W) 715-287-3335 Fax: 715-287-4464		Preview PO
User PO #						Done
PO Date 5/9/2008						Auto Receive
Posted Date						All PO Items
PO Shipping Best Way				PO Total \$702.00		Receiving
PO Terms						Date Received
Special Notes		Buyer Override				Received By

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.

Select Blank or Default or Select Alternate Layouts		
Quotation	<input type="text" value="Alternate 2"/>	Blank or "Default" settings utilize the standard print layouts.
Sales Invoice	<input type="text" value="Alternate 2"/>	"Alternate 1" setting places the totals section at the bottom of the 1st page instead of at the end of all of the pages.
Work Order - Change Order	<input type="text" value="Default"/>	"Alternate 2" setting reduces the size of the Totals section, by removing the Other Labor sections from both the Report and the Data input screens.

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

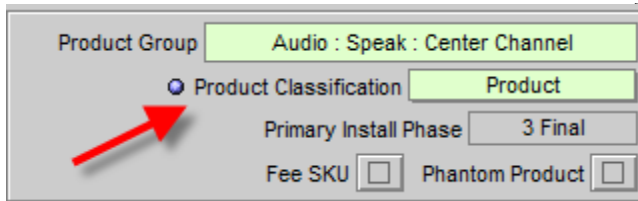
By increasing the size of the data entry fields on the POS Service and Work Order screens and printed forms you can now enter more text such as Site Directions and Work Specified.

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

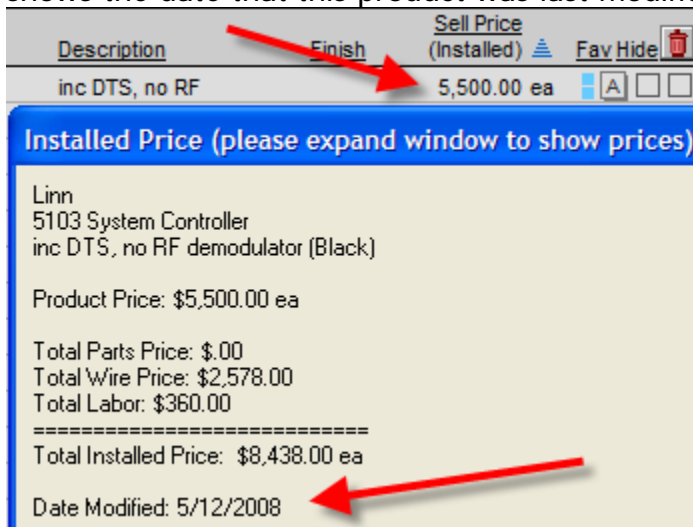
When changing a Products Classification from a "Product" to a "Part or Wire" the Labor, is now automatically changed from Product Labor Supplement to the Parts/Wire Labor Supplement. The Parts & Wire Supplements attached to the "Product" Classification are now automatically removed.



The screenshot shows a software interface for product classification. It includes a 'Product Group' dropdown set to 'Audio : Speak : Center Channel', a 'Product Classification' dropdown set to 'Product' (highlighted with a red arrow), a 'Primary Install Phase' dropdown set to '3 Final', and two checkboxes for 'Fee SKU' and 'Phantom Product'.

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.



The screenshot shows a table with columns: Description, Finish, Sell Price (Installed), Fav, Hide, and a trash icon. A red arrow points to the 'Sell Price (Installed)' column. Below the table, a popup window titled 'Installed Price (please expand window to show prices)' displays the following information:

Linn 5103 System Controller inc DTS, no RF demodulator (Black)	
Product Price:	\$5,500.00 ea
Total Parts Price:	\$0.00
Total Wire Price:	\$2,578.00
Total Labor:	\$360.00
=====	
Total Installed Price:	\$8,438.00 ea
Date Modified:	5/12/2008

A red arrow points to the 'Date Modified' field.

Enhancement – Master Tracker: Improve Interface

See notes below image

Due Date	Item Name	Proposal/Project/CO	Item Owner	Total Labor	Total Pymts
5/7/2008	Proposal Task - Followup	1292.1-1.100	Jim Engandela	78:50:00	\$72,233.68
5/10/2008	Project Milestone - Install	1290.1-1.100	Jim Engandela	2:30:00	

-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

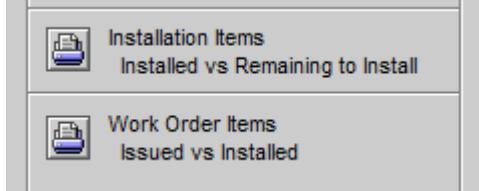
Wire supplements now properly delete when checked. In addition a pop up notice has been added when deleted Wire and Parts Supplements indicating the Labor for the deleted Wire and Part needs to be manually deleted for Supplements that were added to Proposals prior to 1/1/08. After this date, Labor associated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

Master Prefs - Taxes ?

1. Add Tax Regions and Rates
2. Select a Company Location and then Set a Tax Region Default
3. Set Tax Status for Products, Labor, Parts & Wire

1 Company Location - Tax Default

Select	Company	Location	Company	Tax Region Default for Company Locations
	1	EME Audio & Video Systems		Menomonie
	2	Horizon		Eau Claire

2 Tax Regions

Add

Set Default	Tax Region	Jurisdiction Name	Jurisdiction Number	Zip Code	A Tax Rate	B Tax Rate	Total Tax Rate	Delete
	Eau Claire			54770	5.500 %	%	5.500%	
	Menomonie			54701	4.000 %	0.500 %	4.500%	

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.

Fees Report Prices

Show Fees Prices ☒ Yes ☐ No

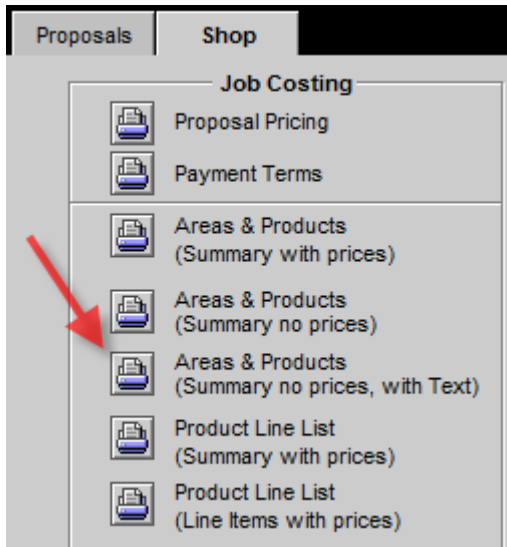
Show Fees Totals ☒ Yes ☐ No

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.



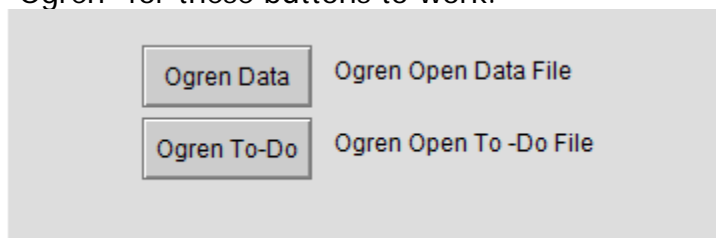
Enhancement – Project Work Orders: Add Area Labor Total

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

Area Labor:		0:45:00		
ID	PZ	Install	Labor	
Installer		Date	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.

Mailing Label & Proposal Name

Contact Category:

RCMS Customer ID:

RCMS Transaction Number:

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

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.

Product Library - RCMS Data Import Utility

Show New Products ? Home

Done

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.

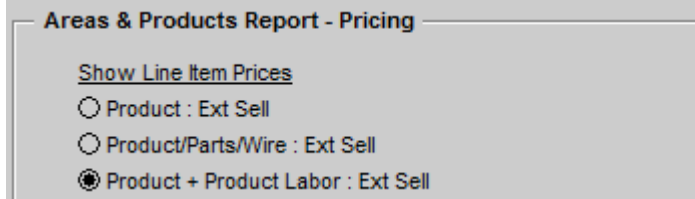
Fix – Proposal: Alpha Finder Updater

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

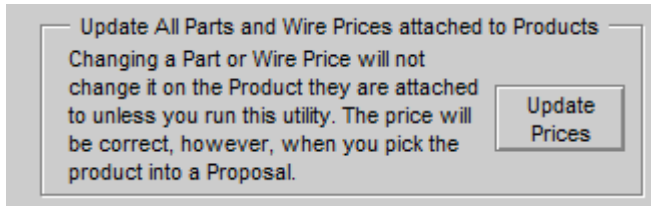
A utility has been added to reset all of the POS Invoices to the Master Preferences Tax Location. This utility is necessary after importing POS invoices from the Custom Proposal System.

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.

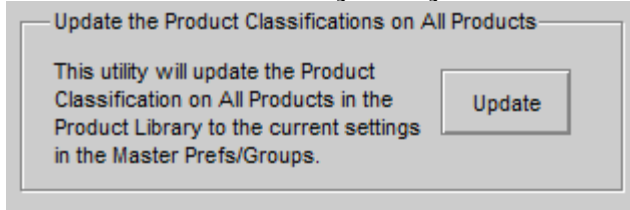
Enhancement – Product Utility 2: Update All Parts & Wire Prices

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

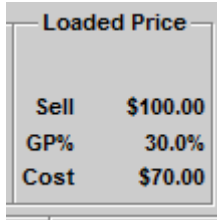
Under some circumstances entering the Completed or Archived Proposal lists did not show all of the Proposals. This has been corrected.

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.



Loaded Price	
Sell	\$100.00
GP%	30.0%
Cost	\$70.00

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.

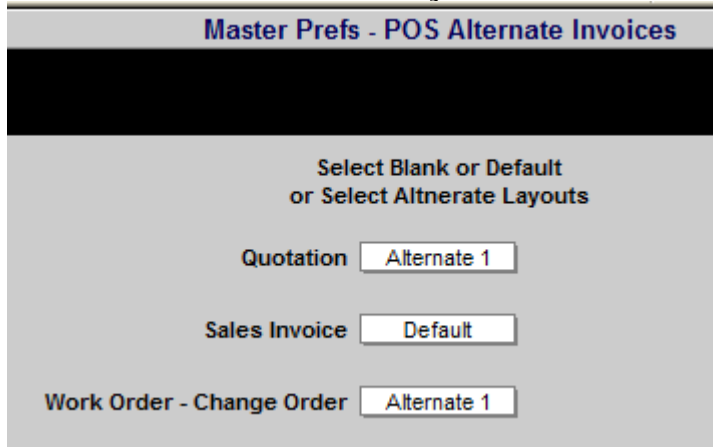
Enhancement – Point of Sale: All Invoices: Contact Phone Numbers

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.

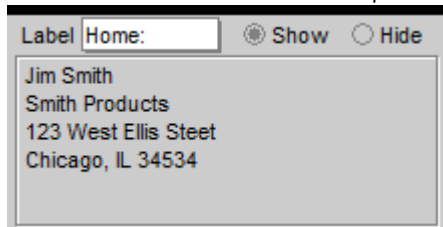


Enhancement – Point of Sale/Service Orders: Extend Description of Problem field.

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

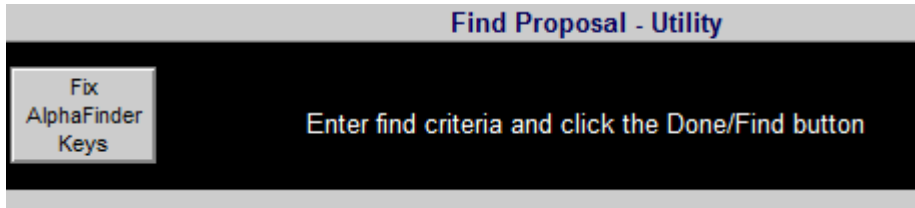
Changing the totals section on POS Quotations, Invoices and Work Orders from a Body part to a Sub Summary part prevents the totals section from being split across page breaks and this improves the printing quality.

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.

3 - If Client doesn't exist in RCMS, enter info & click add 

Changing client info will change it on all related Proposals
To clear client info **only** on this proposal, click clear 

First

Last


Company

Label

City

State Zip

Label

Copy 1>2 

City

State Zip

Home Phone

Work Phone

Mobile

Fax

Other

Radio ID#

eMail Address


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.


Purchase Order	PO Total	\$3,088.50	Receiving
Date Received			
Received By		<input type="text"/>	
Buyer Override		<input type="text"/>	

Receive	Qty	Qty
View-Edit	Recvd	Open
	3	6 ea
	Rcv'd: 1/5/2008 By: MR	
	3	5 ea
	Rcv'd: 1/5/2008 By: SR	

View-Edit - Expand window to view 

Rcv'd: 1/5/2008 By: MR Qty: 1
1111 : 2222 : 3333

Rcv'd: 1/5/2008 By: LB Qty: 2
3333 : 4444



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.

PO
Open Quantity
6

Quantity Received: 1
Received By: MR
Date: 1/5/2008

Enter each Product Serial Number on a separate line
2938389234
29388HR843
48H489R4

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.

Products with Serial numbers for			
John & Mary Smith			
1284.1-1.100			

Qty	Make	Model	Description
2 ea	Klipsch	RS-7	Reference Surround Speaker
Rcv'd: 1/5/2008 By: LB Qty: 2 3456845 : Q345H3044			

Qty	Make	Model	Description
1 ea	Linn	5101 PERSONAL HANDSET	Universal learning remote
Rcv'd: 1/5/2008 By: LB Qty: 1 23546			

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.

Finalized CO - Tax Summary - View

Print

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.

Master Project - Change Orders							
Joel Roberts							
Home Entertainment System 1292.1-1.100							
Current Change Orders							
View	Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance
	Final	7/31/2007	1292.1c1-1.100		\$1,405.64		\$1,405.64

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

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

Zero Labor
Tax Location A B Rate
Eau Claire 5.50% 5.50%
Ship:
Refresh

Sales Invoices

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

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

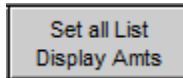
Zero Labor
Tax Location A B Rate
Eau Claire 5.50% 5.50%
Ship:
Refresh

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

Date	Proposal	Amount	Due	Done	Arch	
12/17/2007		\$164.40	\$104.40	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9/15/2005		\$833.45	\$833.45	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

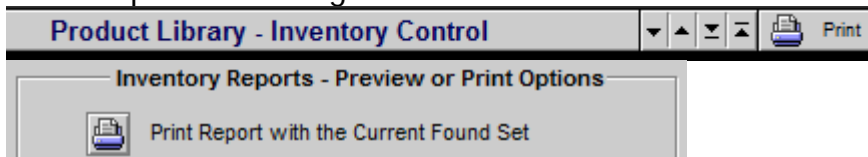
POS/Utility: This utility will repost Total Amounts and Total Due Amounts on all POS records. This utility will run when upgrading as well.



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

Name Product Group

Old Product Group:
Audio - Misc - Final Part

Discipline	Category	Type	Product Classification	Primary Install Phase
Audio	Misc	Final Part	Part	3 Final

Do not exceed field lengths and do not enter carriage returns

Enhancement – Contact/Contact Detail/Entities: Add Labels

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

Attachment Entities		
Enter Computer File Paths to reference documents		
View	Label	File Path
	1st floor blueprint	c:/clients/Fred_Smith

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.

POS Entities					
View	Entity Kind	Number	Created	Total	Remaining Balance
	Invoice	SI #7200	1/3/2008	\$1,912.47	\$912.47
	Quotation	QT #7199	1/3/2008	\$2,390.58	

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

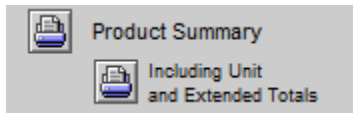
Duplicating an Area that contains a Pure Supplement now duplicates the Pure Supplement

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.

Products in Basement			
Edit Labor	Make	Model	Phase
⊕	Linn : Knekt RCU		
	Autom : Contr : Keypad		2
⊕	Supplemental : Items		3

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

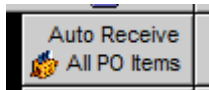
When entering the Discipline by Sub or Grand total screens, Disciplines that have no Products or Supplements are now automatically deleted.

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.

Product Library - Assign Product Group					1 Products Selected	?
1. Select Product Group 2. Click Assign Group button to set 1 Products					Assign Group or Cancel	
Audio : Amplifier : Surround Receiver						
Pick	Discipline	Category	Type	Class		
	Audio	Amplifier	Integrated Amplifier	Product		
	Audio	Amplifier	Multi-channel	Product		
	Audio	Amplifier	Preamplifier	Product		
	Audio	Amplifier	Single Channel	Product		
	Audio	Amplifier	Stereo	Product		
	Audio	Amplifier	Stereo Receiver	Product		
	Audio	Amplifier	Surround Processor	Product		
	Audio	Amplifier	Surround Receiver	Product		
	Audio	Control	Multi-channel	Product		
	Audio	Misc	Final Part	Part		
					Group Navigator	
					Discipline - Show All	
					Audio	
					Up	
					Down	
					First	
					Last	
					First Group 1	
					Go to Last Selection	
					Use Last Selection	

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.