



# SmartPartner Software

## SCPS 7.9 Upgrade Announcement 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_2008.pdf)

[http://www.horizon-software.com/download/SCPSrevisions\\_2007.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_2006.pdf)

[http://www.horizon-software.com/download/SCPSrevisions\\_2005.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_2004.pdf)

[http://www.horizon-software.com/download/SCPSrevisions\\_2003.pdf](http://www.horizon-software.com/download/SCPSrevisions_2003.pdf)

Regards,  
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President/Developer

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**SCPS Version 7.9**  
**Released: 12/21/2009**

**Enhancement – Proposals/Details: Screen changes**

The Maps and Directions fields have been moved to its own screen and can be accessed from this button. The Entity Info has been consolidated and displayed at the bottom of the Proposal Detail screen.

**Proposal - Details** [Print] [?]

**Client** Jim Engandela  
**Project** Home Entertainment System  
1290.1-1.100

**Details** | **Contacts** | **Com Log** [Maps and Directions] [Done]

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**Proposal-Project Info** [Update]

Proposal Due Date: 11/14/2009  
Project Reference:   
Blueprint Reference:   
Where did you hear?:   
Client Referred By:

**Shop Info** [Update]

Sales Location: EME Audio & Video Systems  
2950 Mall Drive  
Eau Claire, WI 54701  
Sales Specialist: Jim Engandela  
Title: President  
Project Manager: Joel Roberts  
Project Engineer: Jon Oster  
Shop Notes:

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**Proposal-Project Notes** | **Permanent Contact Notes**

**Entity Information**

Created: 10/30/2009  
Modified: 12/2/2009  
Sold: ☐  
Completed: ☐

Original Proposal/Project Title: Home Entertainment System

Shop Location: 1  
Alt Shop Location: 01  
Salesman's Number: 100

### Enhancement – Proposals/Maps & Directions: New Screen and Query

Clicking the Get Internet Map button will give you the option to use **MapQuest** or **Google Maps** and instructions for each. Maps can be printed using the print button at the top of the screen.

**Proposal - Maps & Directions** Print ?

Client: Jim Engandela  
Project: Home Entertainment System 1290.1-1.100

Details Contacts Com Log

Paste Text Directions Text Directions

2950 Mall Dr, Eau Claire, WI, 54701-6839 -

1. Start out going SOUTH on LONDON SQUARE ML/MALL DR toward SKEELS AVE. 0.2 mi
2. LONDON SQUARE ML/MALL DR becomes E HAMILTON AVE. 0.1 mi
3. Turn RIGHT onto WI-93 S. 11.9 mi
4. Turn LEFT onto CR-L. 0.1 mi
5. Turn RIGHT to stay on CR-L. 2.4 mi
6. Turn LEFT onto CR-U/CR-Y. Continue to follow CR-Y. 1.3 mi
7. Turn LEFT onto CR-U. 1.2 mi
8. S15700 COUNTY ROAD U.

Paste Map Pix Clear Map Picture Insert File Pix

MAPQUEST

Elk Mound Eau Claire Altoona Fall Creek Augusta Ludington Caryville

DUNN EAU CLAIRE

312 53 53 12 27

0 7 km 4 mi

### Enhancement – Proposals/Print Menu: All Reports Show/No Show Tax

All Proposal Reports that display Totals and Tax have been fine tuned to properly reflect the Show/No Show Tax preference set for each specific Proposal. The Custom Reports module has also been tweaked and labeled as version 7.9. The option to Include Tax in the Grand Total amount has been temporarily turned off for further development.

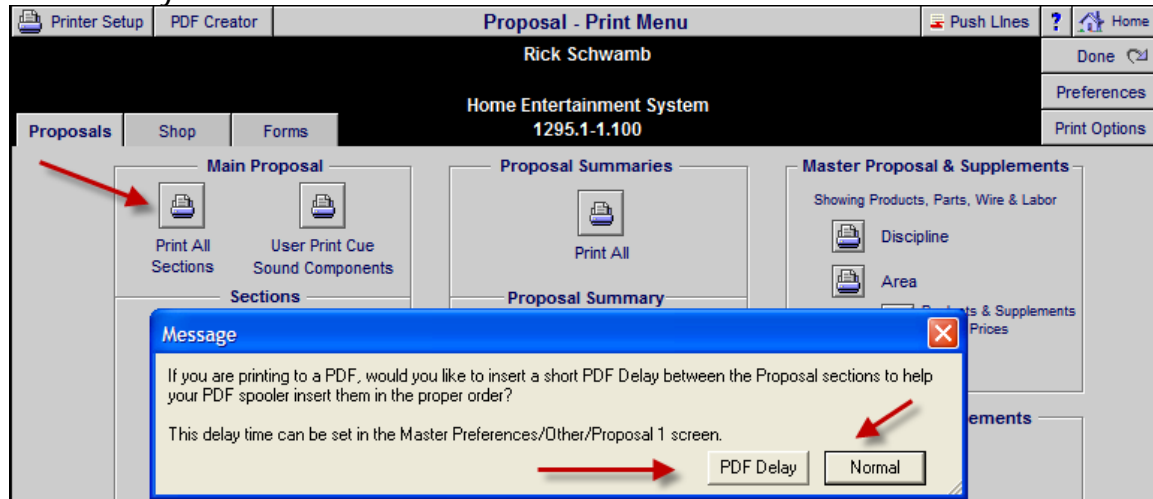
## Enhancement – Proposals/Discipline/Area/Phase screens. Tax Display

All Proposal Discipline/Area/Phase Sub and Grand Total screens now display the Show Tax setting for that proposal.

Discipline	Area	Phase	Proposal - by Area Subtotals							Print	?	Home	
Subtotals	Subtotals	Subtotals	Hayes Callahan									Done	
Grand Totals	Grand Totals	Grand Totals	Home Entertainment System 1290.1-1.100									Show Sales Tax <input checked="" type="radio"/> yes <input type="radio"/> no	Client Mode <input type="checkbox"/>
Zone-Area			Sell	Cost	GP%	Labor (h:m:s)							
Home Entertainment System			Equipment	390.00	234.00	40.0%							
			Installation	862.50	454.38	47.3%							
			Misc. Parts	1,085.00	649.00	40.2%							
			Wire & Cable	1,312.50	733.50	44.1%							
			Additional Fees	84.75	41.60	50.9%							
			Total	\$3,734.75	2,112.47	43.4%	10:52:30						
			Tax	200.75									
Grand Total			\$3,935.50										

## Enhancement – Proposals/Print Menu/Reports Print All Reports: Dialog

When using the Print All button, the PDF Delay message has been simplified for more clarity.



## Enhancement – Proposals/Proposal Detail: Sum View

You can now go to the Sum View of your proposal and return to this screen using this button.

Discipline	Area	Phase	Proposal - Detail by Area							Q View	Utility		Home
Client		Areas	Fees	Hayes Callahan				Pricing		Purchasing		Leave	
Project	Details	Products	Area Text	Home Theater System				Tracker		Work Orders		Change Orders	
Contact	Log	Supplements	Overviews	1283.1-1.100				Payments		Invoicing		Print Menu	
Client Mode <input type="checkbox"/>		Super View		Sum View				Labor Meter		Labor Total		Grand Total	
Zone - Area				Qty	Make : Model		Description				Area Totals		
Home Theater System													
Zone 1 - Home Theater												27,146.98	
Audio : Amplifier : Multi-channel				1 ea	Linn : 5125		Five channel power amplifier (Black)				2,750.00		
Audio : Speaker : Bookshelf				5 pr	Linn : Katan		Bookshelf loudspeakers: pair Bookshelf				4,975.00		

Super View		Sum View		All View		Proposal - Product Sum View					Print				?		Home	
						Hayes Callahan										Done		
						1283.1-1.100												
Areas		Products		Text														
Labor		Parts		Wire		Tasks												
Zone - Area						Qty	Make : Model						Description					
						1 ea	Linn : 5101 Personal Handset						Universal learning remote					
						1 ea	Linn : 5125						Five channel power amplifier (Black)					
						5 pr	Linn : Katan						Bookshelf loudspeakers: pair					
						1 ea	Linn : Knekt RCU						Knekt room control unit					

### Enhancement – Proposals/Pure Supplements: Stay on Selected Area

When switching between the 3 Pure Supplement screens (Labor, Parts and Wire) the Area you have selected now stays selected instead of defaulting to the 1<sup>st</sup> Area each time you switch screens.

Proposal - Pure Labor Supplements				Refresh
Mike & Jessica Potter				1. Pick an Area 2. Pick or Add a Discipline 3. Add Labor 4. Pick Discipline to View Labor
Security System 1282.1-1.100				
<div> <div>Areas</div> <div> <div>Pick Zone - Area</div> <div>Zone 1 - Basement</div> <div>Zone 1 - Home Theater</div> </div> </div>				
<div> <div>Pure Labor</div> <div>Pure Parts</div> <div>Pure Wire</div> </div>				
<div> <div>Add Discipline</div> <div>Disciplines in Zone 1 - Home Theater</div> <div> <div>Pick Discipline</div> <div>Audio</div> <div>Supplemental : Items</div> <div>Delete</div> </div> </div>				

### Enhancement – Proposal/Utility/Export: Tyler data force Caps

The Store location and Specialist Number are now forced into all Caps for proper importing into the Tyler bookkeeping system.

### Enhancement – Proposal/Product Detail: Shop Notes

A new notes field has been added to the Proposal Product Detail screen that enables you to make internal shop notes for future reference throughout the Project and Change Order process regarding customer requirements or other details. This note field is for internal shop use only and does not appear on any reports at this time. It is available for reference or editing in the Project and Change Order screens, where other fields are "View Only".

<div> <div>Product Cue Notes</div> <div>This Cue can contain notes to help users when picking this product</div> </div>	
Shop Product Notes	

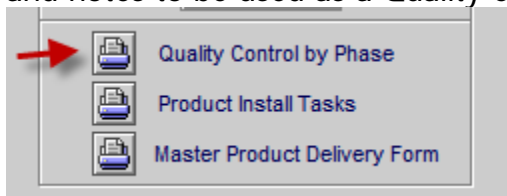
Super View		Master Project - Areas - View				Total Labor	Grand Total	? Home	
John & Mary Smith						Equipment	\$9,142.00	Done	
Areas		Products		Text		Installation	\$925.00		
Home Entertainment System						Misc. Parts	\$95.00		
Labor		Parts		Wire		Tasks	Wire & Cable	\$2,271.75	Labor Time
						Area Total	\$12,433.75	14:52:30	
Click on Area name to View Products						Products In: Zone 2 - Living Room			
Location Zone Sort Area						Sort Discipline Qty Make : Model Unit Sell			
1 m Home Theater						m Audio 1 ea Klipsch : RC-35			
2 m Living Room						Shop Product Notes Speaker : Center Channel \$399.00			
3 m Office									
4 m Dining Room									
4 m Kitchen						m Audio 2 ea Klipsch : RF-35			
5 a Master Bedroom						Shop Product Notes Speaker : Floor \$499.00			
5 b Master Bathroom									

### Enhancement – Project/Change Orders: Increase CO field size

The name "Change Order" can be changed in the Master Prefs/Other/Project 2 screen. The size of the field that displays this name on the Printed Pending and Final CO has been increased to accommodate more characters.

### Enhancement – Project/Print Menu/Shop: Quality Control Punch List

A new report on the Project/Print Menu/Shop screen shows you each product and supplement for each Installation Phase and by Zone-Area with a check box and notes to be used as a Quality Control punch list.



Quality Control - Master Proposal by Phase			
Home Theater System for Hayesx Callahanx			
Zone - Area	Discipline	Make - Model - Description	Qty Unit Price Ext Price
Labor	Part	Wire	
<b>QC Check - Notes</b>			
<b>Installation Phase: 1</b>			
<b>QC Check - Notes</b>			
<b>Zone 1 - Home Theater</b>			
<b>Audio</b>			
		Linn : Bulk Analog interconnect : Analog interconnect	
		Linn : K20 Cable : Loudspeaker cable	
		Linn : K20 Cable : Loudspeaker cable	
		Linn : K20 Cable : Loudspeaker cable	
		Linn : K20 Cable : Loudspeaker cable	
		Linn : K20 Cable : Loudspeaker cable	
<b>Automation</b>			
		Linn : K10 Cable : Loudspeaker cable	
		Monster : CAT5 Bulk : CAT5 Knekt cable	
		Linn : CAT5-40m : Terminated CAT5 Knekt cable -	
<b>Installation Phase: 2</b>			
<b>QC Check - Notes</b>			
<b>Zone 1 - Home Theater</b>			
<b>Automation</b>			
		Linn : Knekt RCU : Knekt room control unit : White	
		Installation	
		Programming	
		Parts Labor	
		Wire Labor - Bulk	
		Linn - Knekt RCU Metalwork - Back box	

## Enhancement – Project/Work Orders: New Pick List Report

You can now select a Pick List report for your Work Orders directly from the Work Order screen. You can also print a full Staging Report from the Project/Print Menu/Shop screen that contains all of the products and supplements in your Project.

Work Order Detail										Prev/Next	?
Setup            Delete WO				<input type="checkbox"/> Show Area Text <input type="checkbox"/> No Time on WO            Post WO							
<b>WO Number</b> 2008 - 1285.1-1.100 <b>WO Date</b> 12/11/2009 <b>Posted Date</b> 12/11/2009			<b>Mike &amp; Jessica Potter</b>  <b>Home Theater System</b> <b>1285.1-1.100</b>			Create Continuation WO            Print Pick List            Done					
				Auto Set All Installed Qty            Print Install Tasks            Print & Post WO            View							
<b>WO Installer</b> <input type="text"/> <b>Est Install Time</b> <input type="text"/> <b>Scheduled Date</b> <input type="text"/>		<b>WO Notes</b> <input type="text"/>		<b>Qty Left to Install</b> 4		<b>Installed by:</b> <input type="text"/> <b>Install Time:</b> <input type="text"/> <b>Total Time</b> 0:00:00 hrs:min					
Qty To Install	Zone Area Phase	Location/Notes	Sort	Make	Model Serial Numbers	Class Description	Install Log	Qty Installed	Installed By	Labor Date	Qty Left
1 ea	Zone 1 - Home Theater		1	Linn	5125	Product					1
3						Five channel		1:00:00			
3 pr	Zone 1 - Home Theater		1	Linn	Katan	Product					3
3						Bookshelf		1:00:00			

Work Order Date	EME Audio & Video Systems	Work Order Number
12/11/2009	<b>Work Order - Pick List</b>	2008 - 1285.1-1.100
Page: 1		
<b>Address 1:</b> Mike & Jessica Potter 567 58TH Street Oakland, CA 94607		
<b>Address 2:</b> Mike & Jessica Potter		
<b>Contact Numbers</b> (H) 715-830-5022 eMail: Jessica Robinson		
<b>Client Signature</b>		
<b>WO Installer</b> Sales Specialist Jim Engandela		<b>Project Manager</b> Joel Roberts <b>Project Engineer</b> Jon Oster
<b>Installation</b> Scheduled Date: Date Installed: _____ Credit Release: _____ Installer Name: _____ Projected Install Time: 2:00:00 WO Installation Time: Actual Install Time: _____		
<b>Zone 1 - Home Theater</b>		
<b>Pick</b>	<b>Qty</b>	<b>Unit Sell Ext Sell</b>
	1 ea Linn : 5125	2,750.00 2,750.00
	Product : Five channel power amplifier (Black)	
	3 pr Linn : Katan	995.00 2,985.00
	Product : Bookshelf loudspeakers: pair	

**Original Project - Print Menu - Shop**

**Mike & Jessica Potter**

**Home Theater System**  
1285.1-1.100

**Installation Utilities**

Select Phase

☐ 1 Prewire  
☐ 2 Trim  
☐ 3 Final

**Staging Document**  
Products & Parts

**Staging Document Summary**  
with total quantity (+ - sum)  
Products & Parts, Wire

### Enhancement – POS: Option to select Price when Picking Products

You now have an Option to choose either the Sell Price, the Minimum Sell Price or the List Price when Picking a Product into all POS Invoices. Checking this box will pop a cue message each time you Pick a Product.

**POS - Quotation** Pick Price Cue ☐ Sold ☐

Print: Preview: Cost: Convert Quote to an Invoice

**Quotation**  
QT #7198

1 of 3

Costing Done

Set Up Prev Next

Label Address 2: ☐ Show ☐ Hide

Hayesx Callahanx  
567 58TH Streetx  
Oaklandx, CA 94607X

Work: 715-287-4592x

Hayesx Callahanx

12/9/2009

Ship VIA Payment Terms Reference # Sales Rep Quotation Title

Quotation prices good for 30 days

Jim Engandela

Pick	Qty	unit	Product Description	Install (h:m:s)	Unit Price	Ext Price	Tax A B
1	ea	Linn : 5101 Personal Handset : Universal learning remote : Black	6:30:00	390.00	390.00	T T	

**Product Library - Pick Products**

Find Products Fav A B C

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 POS Products Hidden Products

Part Phantom Bulk PreCut

**Pick or Add a New Product**

157 of 154 Items

New Product Cancel

Phan Lab Part Wire

Displn	Cat	Type	Pick Class Item Make	Model : SKU	Description Q	Finish	Sell Price Q (Installed)	Sups View Fav
Audio	Multi	Keypad	Linn	5101 Personal Handset	Universal learning	Black	390.00 ea	
aaaa	bbbb	cccc						
Audio	Ampli	Multi-channel						
Audio	Sourc	Phone						
Audio	Sourc	CD Player						
Audio	Ampli	Surround Receiv						
Audio	Speak	Center Channel						
Audio	Speak	Floor						
Audio	Ampli	Preamplifier						
Audio	Ampli	Stereo						

**Message**

Do you want to use the product.....

Normal Sell Price  
Minimum Sell Price  
List Price

List Min Sell Sell



## Enhancement – POS and Contacts: Update POS Contact Info

When you change Contact info (name, address, phone) in the Contact database you can now update all of the POS invoices to the current Contact info from your Contact database. This can be done from the Contact/Utility screen, the POS Existing and New Docks and from within any POS Invoice/Setup screen.

The screenshot shows the 'Point of Sale - Current POS' interface. At the top, there's a header with the EME audio & video logo, user information (User: Jim Engandela, Location: 1 - EME Audio & Video Systems), and navigation links (Utility, Home, Leave). A button on the left is labeled 'Update Client Contact Info on all POS Invoices from the Contact Library'. A red arrow points to this button. The main area is titled 'Current POS' and contains four icons: 'Quotations', 'Service Orders with RMAs', 'Sales Invoices', and 'Work Orders'.

## Enhancement – POS and Project Invoices: Date, Pmt Type, Check Num

Date, Payment Type and Check Number fields have been added to both the POS Sales Invoice and the Project Invoice.

The screenshot shows the 'POS - Sales Invoice' screen. It includes a header with 'Print Setup', 'Delete Invoice', and 'Service Order SO #3191'. The main area displays customer information (Synergy Home Systems) and job site information (Danny & Laurel Fleisher). Below this, there are fields for 'Sales Rep', 'Terms', 'Ship VIA', 'Date', 'Payment', 'Check Number', and 'Reference #'. Red arrows point to the 'Date', 'Payment', and 'Check Number' fields. The bottom section shows a table with columns for 'Pick', 'Qty', 'unit', 'Product Description', 'Install (h:m:s)', 'Unit Price', 'Ext Price', and 'Tax'.

The screenshot shows the 'Sales Invoice Detail Not Posted' screen. It includes a header with 'Setup', 'Delete SI', and 'Project Contact'. The main area displays invoice details for 'Mike & Jessica Potter'. Below this, there are fields for 'SI Number', 'SI Date', 'Posted Date', 'Export Date', 'Date', 'Payment Type', 'Check Number', 'Invoice Total', and 'Special Notes'. Red arrows point to the 'Date', 'Payment Type', and 'Check Number' fields. The bottom section shows a table with columns for 'Make', 'Model', 'Description', 'Kind', 'Serial Numbers/Notes', 'Qty', 'Unit Sell', and 'Extended Sell'.

### Enhancement – POS and Project PO, Sales & WO's: Done buttons

We have now added Done and Home buttons at the bottom of all of the POS Invoices and Project Invoice screens so you can leave those screens after scrolling down to the bottom.

The screenshot shows a software interface for creating quotes. It includes a table for 'Technical Services' with columns for 'Hours', 'Rate', and 'Amount'. A 'Zero Labor' button is present. To the right, there are fields for 'GP%' (40.0%), 'Line Items' (1,950.00), 'Labor' (500.00), 'Other' (0.00), 'Subtotal' (2,450.00), 'Tax' (107.25), 'Freight' (0.00), and 'Total' (2,557.25). A 'Refresh' button is also visible. At the bottom right, a red arrow points to a 'Done' button, which is located next to a 'Home' button.

### Enhancement – Products/Utility/Distributor: Capitol Sales Items

You can now download the latest Capitol Sales catalog and product prices. First download the file from the Horizon Server using button #1 and then import the file into SCPS using button #2. Your product prices will be updated if they already exist in your SCPS library and new items will be automatically added.

Please contact other distributors you work with and encourage them to contact Horizon at [horizon@triwest.net](mailto:horizon@triwest.net) to have their products included in your software.

The screenshot shows the 'Product Library - Distributor Import Utility' window. It has a title bar with 'Delete all Products in Library', 'Product Library - Distributor Import Utility', and '4497 of 4497 Items'. A 'Done' button is in the top right. Below the title bar is a menu bar with options: 'Function Utility', 'Grooming Utility', 'Update Utility', 'General Import', 'User Import', 'RCMS Import', 'Distributor Import', 'Graphics Draw!', and 'SCPS Mobile'. The 'Distributor Import' option is selected. The main area is titled 'Import Products from Capitol Sales' and contains two buttons: 'Download File CapitolSales \_Items\_1' and 'Import File CapitolSales \_Items\_1'. Red arrows point from the buttons to the instructions: '1. First download the Capitol Sales\_Items\_1 file from the Horizon server and save it onto your computer. Do not save it in your SCPS folder, but remember where you save it.' and '2. Open the CapitolSales\_Items\_1 file that you downloaded onto your computer. Items that exist in your SCPS database will be updated with the current Capitol prices and new items will be added to your SCPS products.'

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		Show Hidden		Detail List																		New Product		Leave						
Part	Phantom			Inventory Control    Utility Lists																		Part    Lab		Product Sets						
Bulk	PreCut																					Phan    Wire		Print Menu						
4497 of 4497 Items																														
Show All Groups																														
Displin	Cat	Type	Class View Make		Model : SKU		Description		Finish Notes		Sell Price    Auto Tag		(Installed)		Fav Hide															
Telep	Consumer Corded	AT & T	1040 : 1030493		4-Line Speakerphone		109.99 ea																							
Telep	Consumer Corded	AT & T	1070 : 1030520		4-Line Speakerphone		129.95 ea																							
Telep	Accessories	AT & T	15910 : 1027118		25' Telephone Line		7.99 ea																							
Telep	Accessories	AT & T	16654 : 1027126		Dual Outlet		3.80 ea																							
Telep	Accessories	AT & T	1739 : 1030474		Digital Answering		17.95 ea																							

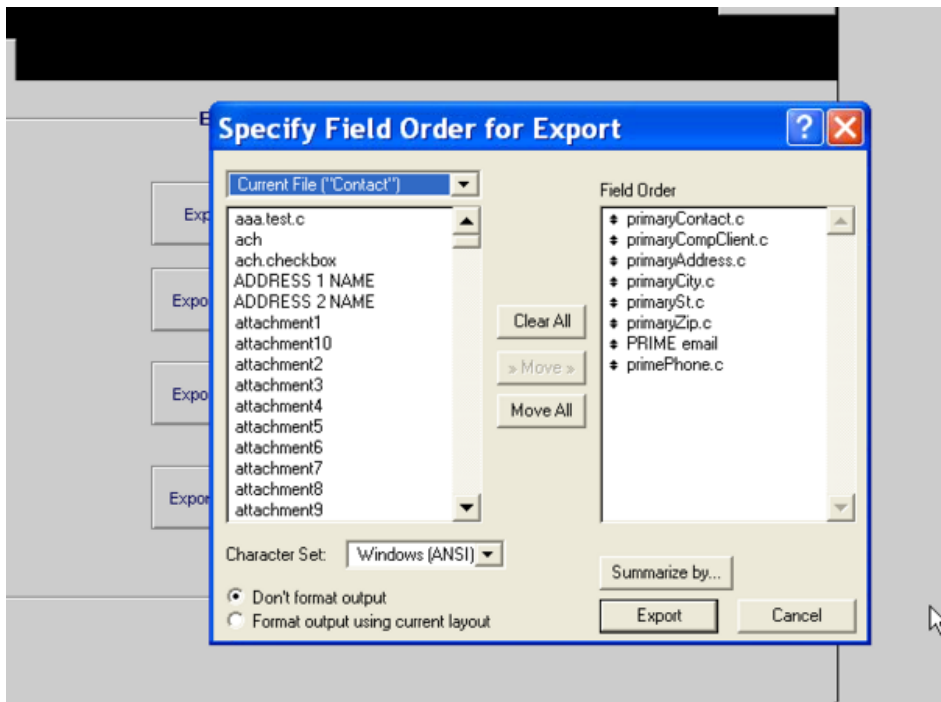
## Enhancement – Contacts/Details: Charge Cards

The Info screen has been renamed to Details to match the Proposal Detail screen. The number of Charge Card fields has been increased to handle more specific info.

More Info	Contacts - Details		?	Home																											
Creation Date: Modified Date: 12/4/09 zk.contact.p: 2797		Hayes Callahan		Done																											
Contact	Details	Com Log	Transactions	Entities																											
Contact Notes		Attachments																													
Date Stamp Don Garon 773-725-1177 4585 N. Merrimac St. Chicago, IL 60630 Bob Haines cell 715-574-3583		Enter Computer File Paths to reference documents <table border="1"> <thead> <tr> <th>View</th> <th>Label</th> <th>File Path</th> </tr> </thead> <tbody> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> </tbody> </table>			View	Label	File Path																								
View	Label	File Path																													
Picture 1	Picture 2	Picture 3	Picture 4	Picture 5																											
Charge Card Card Type: Cashier's Check Name on Card: Card Number: Code: Expire Date: Pay Terms: Credit Limit: Credit Limit \$5000		Misc Info <table border="1"> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>																													
Other Info																															

## Enhancement – Contacts/Utility/Export: Export to Outlook

You can now select the location and file name of the exported file. This helps workstations direct the file their computer. The export field map now includes the primary contact info.



### Fix – Proposals: Pick Products Parts Supplement Labor

In some cases Parts Labor Supplements was not coming into a Proposal along with the Part, even though you could add Pure Parts Supplements and the Labor was coming in. This has been corrected.

### Fix – Contacts/Contact Entities: Select POS Invoice

Clicking on any POS Entity now takes you to the correct POS Invoice instead of the 1<sup>st</sup> one in the list.

X = Archived		POS Entities		Remaining
View	Entity Kind	Number	Created	Balance
	Purchase Order	PO #7200	12/9/2009	
	Quotation	QT #7198	12/9/2009	
	Work Order	WS #7199	12/9/2009	

### Fix – Contacts/Contact Detail: Fix the replace data feature

The replace data feature now works properly and gives you the usage instructions when you click on a field and then click on the Replace data button.

Find Contacts Replace Data

Contacts - Contact Detail

Hayes Callahan

Duplicate Contact Delete Contact

New Contact New Proposal New POS New Task

Print Menu

Print ? Home

Done

Prev Next 1 of 12

Category Client Class Key ID Fav

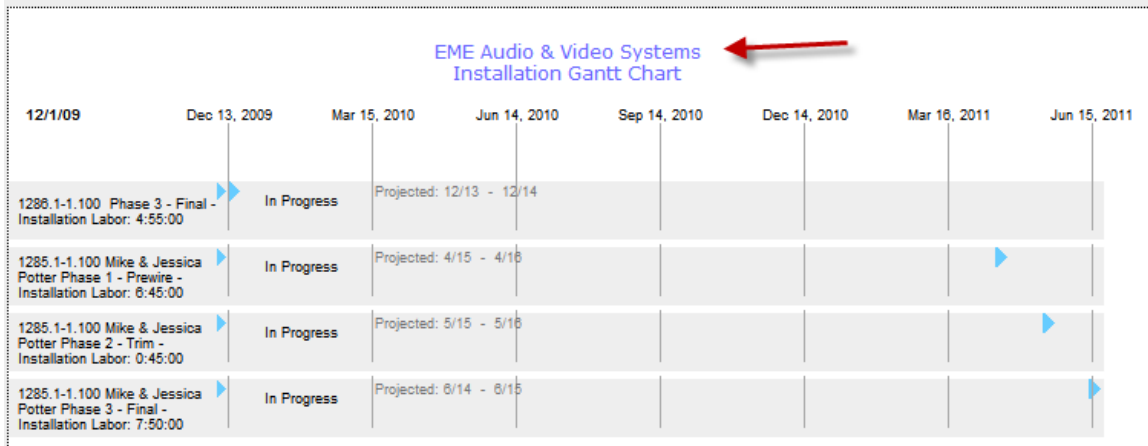
PO Vendors? Assign Products Group Status Staff SE Tickler Tag

Company Vendor # Web Address Web

Fav Merge Title First Name Last Name Job Title eMail Address eMail

### Fix – Master Tracker: Gantt Chart Title

Title now picks up the Company name of the User that is logged in  
>>>>Dates are corrected

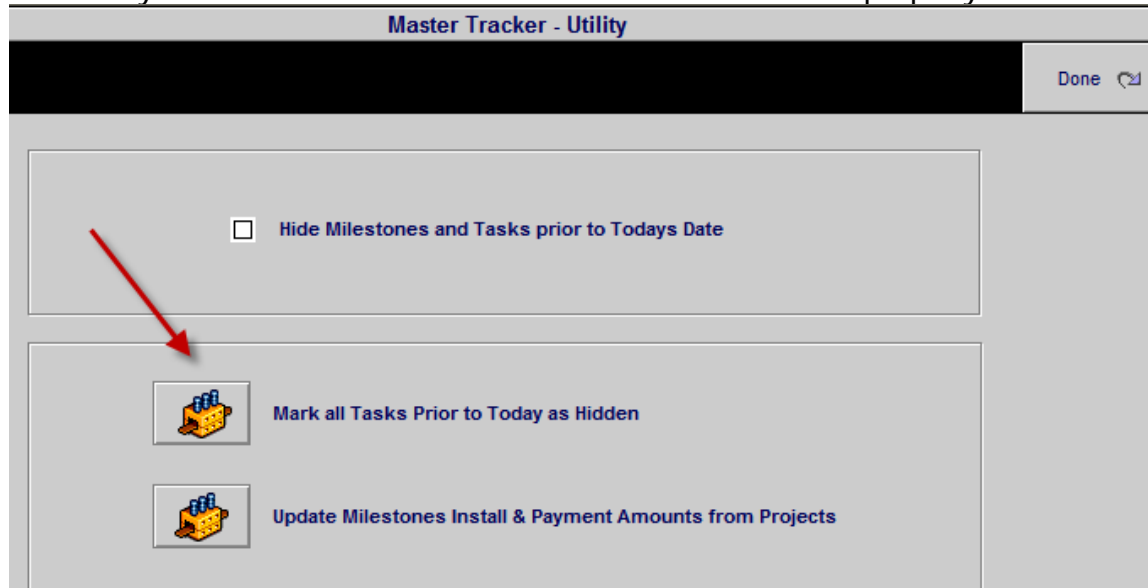


### Fix – Master Tracker/Utility: Mark All Tasks Prior to Today as Hidden

This utility is now connected to the correct routine and runs properly.

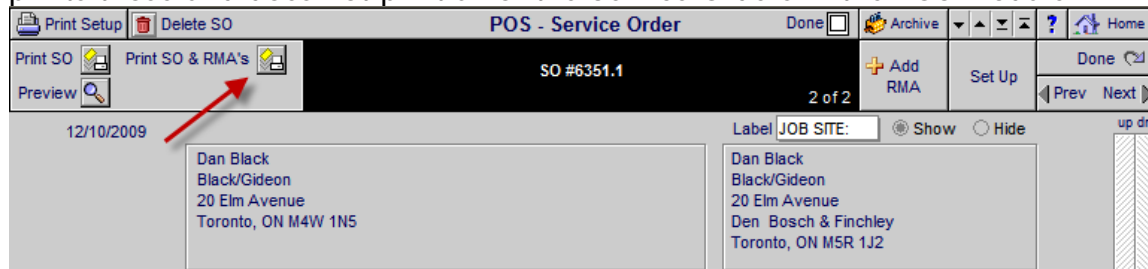
### Fix – Master Tracker/Utility: Mark All Tasks Prior to Today as Hidden

This utility is now connected to the correct routine and runs properly.



### Fix – POS/Service Order: Print Service Order and All RMA's

Printing the Service Order and all related RMA's to that Service Order now only prints those and does not print all of the Service Orders in the POS module.



### Fix – Product Library/Find Products: Find Makes...Improvement

Occasionally a 0 value will be placed in the Inactive field instead of it either being blank or 1. The routine for finding Makes now ignores a 0 value and will find all products for the Make you are looking for.

**SCPS Version 7.8v3**  
Released: 10/29/2009

**Fix – Proposals/Areas & Products/Pure Supplements/Parts: Pick Area**

You can now select the Area that you wish to add Parts to as you can with the Labor and Wire supplement screens. (add portal location field, duplicate layout, delete and replace all other portals)

**SCPS Version 7.8v2**  
Released: 10/17/2009

**Fix – Proposals/Print Menu/Reports Print All Reports: No Print Dialog**

When using the Print All button and the Custom Reports module the Print Dialog box is suppressed for each Report Section

```

"nav.printMenu"

* Perform Script [Sub-scripts, "util.flushCache.on/off"]
* Perform Script [Sub-scripts, "ops.allowUserAbort [freeze]"]
* If ["Status( CurrentLayoutName) = "propByArea" and Status( CurrentFoundCount) < 2"]
*   Show Message ["Entities need at least one Area in order to print properly."]
* End If
* Set Field ["zxl.report", ""]
* Set Field ["zxi.finalCoDisplay", ""]
* Set Field ["shop~one::zx.expProj", ""]
* Set Field ["pref~one::zxn.layNumPrint.g", ""]
* #If'd out so that Print All Proposal when using Reports will not trigger the Print dialog option
* If ["0"]
*   Set Field ["pref~one::zxf.previewOrPrint", ""]
* End If
  
```

**Fix  
in Main  
Report Print All  
suppress Print Dialog**

**SCPS Version 7.8**  
Released: 10/14/2009

**Enhancement – Master Preferences/Labor/Labor Rates: Update Labor**

After making changes to the Master Prefs Labor Categories or Parts & Wire Default Times you can Update your entire Product Library using these Utilities. Existing proposals/projects will not be changed, but newly picked products and supplements will reflect these settings. These Utilities now update all of your Product Library products and supplements including Hidden Products and Supplements.

**Master Prefs - Labor Rates** ? Home

Special Note: If you change the default times, please update your product library using the Update buttons below. Done

Labor Supplements	Labor Rates	Labor Sub Cats	Labor DOD
<div style="display: flex; justify-content: space-between;"> <div>  Update Product Library </div> <div> <div>Default</div> <div>Hourly Rates 1</div> <div>Basic Rate</div> </div> <div> <div>Hourly Rates 2</div> <div>Inner City Rate</div> </div> <div> <div>Hourly Rates 3</div> <div>Prewire only</div> </div> <div> <div>Hourly Rates 4</div> </div> <div> <div>Hourly Rates 5</div> </div> </div>			
	<div>Labor Categories</div> <div>Cost</div> <div>Sell</div>	<div>Cost</div> <div>Sell</div>	<div>Cost</div> <div>Sell</div>
1 - Installation	\$30 \$60	\$40 \$80	\$15 \$30
2 - Programming	\$40 \$80	\$50 \$100	\$15 \$30
3 - Training	\$50 \$100	\$60 \$120	\$15 \$25
4 - Parts Labor	\$30 \$50	\$30 \$60	\$15 \$25
5 - Wire Labor - Bulk	\$35 \$60	\$35 \$70	\$15 \$25
6 - Wire Labor - Precut	\$40 \$60	\$35 \$70	\$15 \$25

Labor Categories	Default Labor Time
	Labor Time (hrs.min:sec)
4 - Parts Labor	0:10:00 Parts per Each
5 - Wire Labor - Bulk	0:00:10 Bulk per Foot
6 - Wire Labor - Precut	0:01:00 Precut per Pair

**Enhancement – Master Preferences/Tax: Tax Default Rate**

Add the Default Tax rate field to the Tax Default Portal to make it easier to determine that your Default is set to the latest Tax Rate.

**Master Prefs - Taxes** ? Home

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

1 Company Location - Tax Default				
Select Company	Location	Company	Tax Default for each Company Location	Total Tax Rate
	1	EME Audio & Video Systems	Eau Claire	4.000%
	2	Horizon	Menomonie	5.500%

New Tax Region

2 Tax Regions

Note: Please click on the Set Default icon after changing tax rates

Set Default	Tax Region	Jurisdiction Name	Jurisdiction Number	Zip Code	A Tax Rate	B Tax Rate	Total Tax Rate	Delete
	Eau Claire			54770	4.000 %		4.000%	
	Menomonie			54701	5.000 %	0.500 %	5.500%	



### Enhancement – Proposal/Options: Currency default = \$

If the Currency default in Master Preferences (Other/Misc 2) is blank then the Options display in the Proposal will display a \$ symbol next to the Price.

**Currency Symbol**

Currency Symbol  Blank = \$

This setting changes the Proposal "Option Product" listing

Use the Custom Proposal Reports Module for Printed Currency Symbols

	Discipline		Area		Phase	Proposal - Detail by Area							Q View	Utility			Home
Client		Areas		Fees		Hayes Callahan				Pricing		Purchasing		Leave			
Project	Details	Products		Area Text		Home Theater System				Tracker		Work Orders		Change Orders			
Contact	Log	Supplements		Overviews		1283.1-1.100				Payments		Invoicing		Print Menu			
Zone - Area		<input type="button" value="Super View"/>		<input type="button" value="Client Mode"/>						<input type="button" value="Labor Meter"/>		<input type="button" value="Labor Total"/>		<input type="button" value="Grand Total"/>			
Discipline : Category : Type						Qty	Make : Model		Description				Area Totals				
Home Theater System																	
Zone 1 - Home Theater																	23,836.98
Audio : Amplifier : Multi-channel						1 ea	Linn : 5125		*Option: Ext Price \$2,750.00 Five				Option				
Audio : Speaker : Bookshelf						5 pr	Linn : Katan		Bookshelf loudspeakers: pair Bookshelf				4,975.00				

### Enhancement – Proposal/Print Menu: Areas & Products: Hide Labels

If there are no products in an area, then the Qty label on the area header and Area label on the Area Subtotal are blank. This makes a cleaner looking report.

Home Theater System  
for Hayes Callahan

**EME**  
audio & video

---

**Areas & Products**

**BATHROOM 3**

This area includes the following products and features.

### Enhancement – Proposal/Print Menu: Fees Report: Hide Total Labels

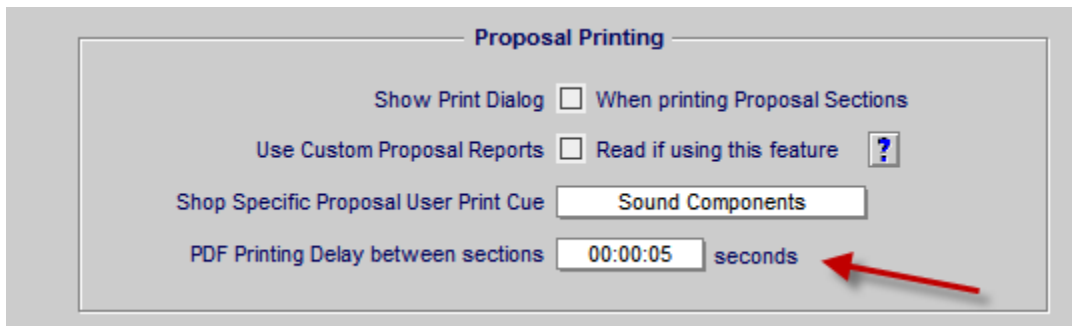
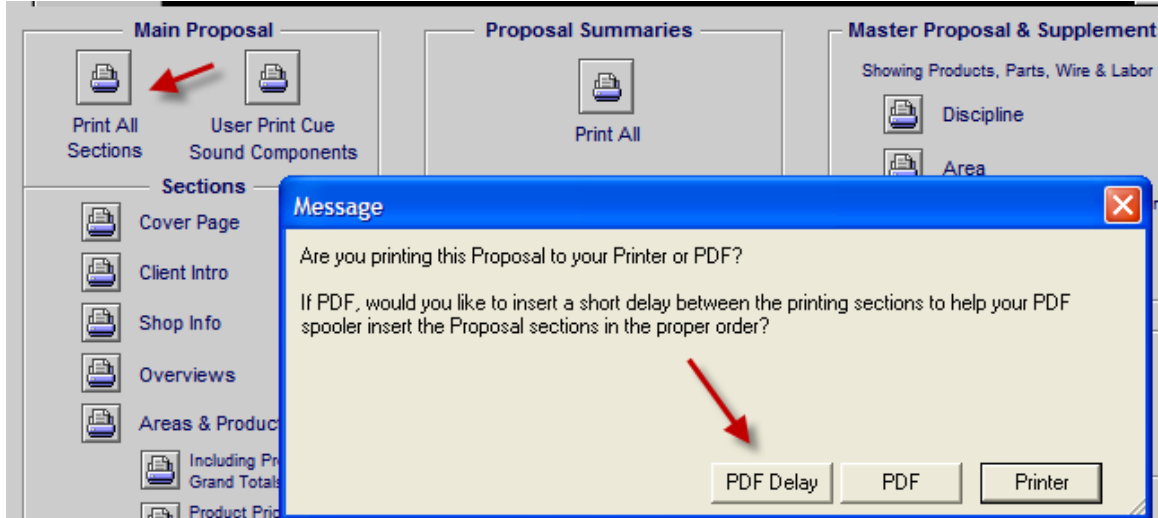
If the Option to Not Show Fee Grand Totals on the Fees report, then the Subtotal Line is also Hidden. This makes a cleaner looking report.

**Project Management** \$0.00

Meetings designed to facilitate the seamless integration of the electronic systems with the home. These meetings may be with the Architect, Interior Designer, Contractor, Electrician, Cabinet Maker and other related companies. Verification of project progress so that we may schedule ordering of materials, products, programming and installation as needed to insure work needed on the electronic systems dovetail at the appropriate times with the project schedule. Project site visits to resolve questions or conflicts of the electronic systems with other items in the home. Project quality control checks at the prewire, cabinet installation and final installation to insure systems are delivered as intended by the system design document.

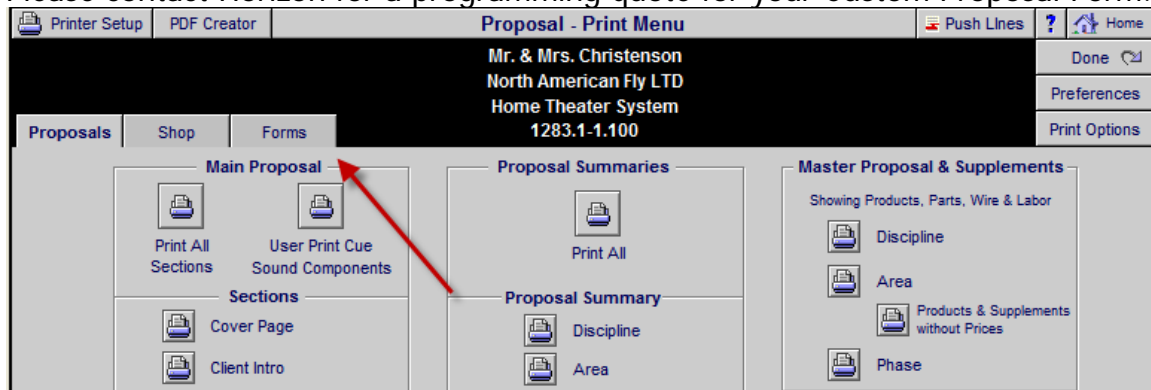
### Enhancement – Proposal/Print Menu: PDF Printing with short Delay

When printing a Proposal you are now prompted with this message that enables you to insert a short delay between the Proposal sections. This delay can help your PDF spooler to insert the Proposal sections into the PDF in the proper order. This delay time can be adjusted in your Master Preferences/Other/Proposal 1 screen.



### Enhancement – Proposal/Print Menu: User Forms

This module enables you to have custom made forms merged with Proposal data created for you by Horizon. Currently Triad has two custom made contracts. Please contact Horizon for a programming quote for your Custom Proposal Form.



Printer Setup **Proposal - Print Menu - User Forms** ? Home

Mr. & Mrs. Christenson  
North American Fly LTD  
Home Theater System  
1283.1-1.100

Proposals Shop **Forms**

User Forms are custom made for SmartPartners to their specific requirements.  
Please contact Horizon Software if you have specific form needs.

Triad

- Sales Contract and Service Agreement
- Commercial Equipment Lease and Service Agreement

### Enhancement – Proposal/Client screen: Upload email to RCMS

Client email addresses can now be uploaded to the RCMS bookkeeping system along with other client info in fields that are accented in green.

### Enhancement – Proposal/Client screen: RCMS Increase Contacts to 10

You can now Add up to 99 contacts to an RCMS Mail list Contact and are no longer limited to a maximum of 10.

Alt Billing Client Mode ☐ **RCMS - Client Info** 01 Location Number Print ?

Client Project  
**Mike Hammerstad** Created 9/12/2006 Done  
Modified 10/8/2009  
Sold  
Completed Follow-Up

Details **Contacts** Com Log  
**Whole House Music System**  
1269.1-1.100

1 - Enter Phones & click Query  
Phone 952-322-2149 Query

2 - Click on the RCMS Client

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 Mike  
Last Hammerstad  
Company  
Label 567 58TH Street  
City Oakland  
State CA Zip 94607  
Copy 1>2  
City  
State Zip  
Home Phone 952-322-2149  
Work Phone 952-953-2677  
Mobile 952-292-3178  
Fax  
Other 715-287-4114  
Radio ID#  
eMail Address hammerstad@aol.com

4 - Selected Tax Update  
Tax ☒ Yes ☐ No New Tax  
Location Jur # Zip  
Eau Claire 54770  
Tax A 5.500%  
Tax B  
Total Tax 5.500%  
Pick Location Zip  
Jurisdiction Jur # Total Tax Rate  
Eau Claire 54770 5.500%  
Menomonie 54701 4.500%

## Enhancement – Project & Completed Project/Print: Options Override

Normally the Print Menu Preferences and Print Options are locked for Projects and Completed Projects. You can now Override this lockout for any User in the Master Prefs/Users/Access Rights screen.

## Enhancement – Project/Change Orders: Remove Pending Balances

Pending Change Orders no longer show the Balance Due. Final Change Orders show the Balance Due which is as it should be.

Master Project - Change Orders									
John & Mary Smith								Print	Home
Home Entertainment System								Master Project	
1284.1-1.100								Project List	
Current Change Orders									
View	Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance Due	Del	
	Pending	9/12/2006	1284.1c1-1.100	Home Entertainment System	\$444.00				
	Final	9/12/2006	1284.1c2-1.100	Home Entertainment System	\$26,492.37		\$26,492.37		
	Final	4/25/2007	1284.1c3-1.100	Home Entertainment System	-\$1,427.78		-\$1,427.78		

## Enhancement – Project/Purchase Orders: Adjust Inventory Auto Set


When using the Purchase Orders - Auto Receive feature in the Inventory Quantity On Hand is now automatically adjusted just as it would be if the Qty Received is manually entered.

Qty Ordered	Make	Description	Model	SKU	Finish	Unit Raw Cost	Ext Raw Cost	Qty Recvd	Qty Open
1 ea	Linn	5101 Personal Handset			Black	234.00	234.00	1	0 ea
1 ea	Linn	Universal learning remote						1	0 ea
5 pr	Linn	Five channel power amplifier (Black)			Silver	1,650.00	1,650.00	5	0 pr
5 pr	Linn	Bookshelf loudspeakers: pair			Black	597.00	2,985.00		

Find Products				Fav A				B				C				Product Library - Inventory Control																▼				▼				▼				Print				?				Home																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																											
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### Enhancement – Project/Invoices: Add Serial Number/Notes field

Printed Project Sales Invoices now include the Serial Number/Notes field. This field will show in gray if it contains data and it is positioned under each line item.

Invoice Number 3013				Invoice Date 10/11/2009	
EME Audio & Video Systems 2950 Mall Drive Eau Claire, WI Phone: 715-287-3335				Page: 1	
Sold To:			Ship To:		
Mike & Jessica Potter 567 58TH Street Oakland, CA 94607			Mike & Jessica Potter		
NN					
Qty	Make	Model/Serial	Description	Price	Ext Price
1 ea	Linn	5101 PERSONAL HANDSET	Universal learning remote	390.00	390.00
		7876			
1 ea	Linn	5125	Five channel power amplifier (Black)	2,750.00	2,750.00
		This could be for notes as well			
5 pr	Linn	KATAN	Bookshelf loudspeakers: pair	995.00	4,975.00
1 ea	Linn	KNEKT RCU	Knekt room control unit	750.00	750.00
1 ea	Linn	MELODIK	Aktive isobarik bass extension loudspeaker	4,950.00	4,950.00
1 ea	Runco	CL-610	DLP Projector	7,995.00	7,995.00
1 ea	Sony	DVP-NS999ES	Progressive Scan DVD	1,099.95	1,099.95

### Enhancement – Project/Utility/Export: Tyler Data Export file name

The File name that the Tyler data export file creates now contains the Proposal/Project number. (T1099.01-100)

### Enhancement – Project/Purchase Order: Add Buyers email

The Buyers email address has been added to the printed PO and the entire Ship to section has been redesigned for better clarity and more space for notes.

<b>Ship to:</b> EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 587937			
<b>Phone</b>		<b>Fax</b>	
715-287-3338		715-287-4468	
<b>email</b>	horizon@triwest.net		
<b>Buyer</b>	Joe Buyer		
<b>email</b>	horizon@triwest.net		
<b>Special Instructions</b> Please ship products as soon as they are available.			
<b>Finish</b>	<b>Cost</b>	<b>Ext Cost</b>	
ES	Black	620.40 620.40	
yer			

### Enhancement –Project/Change Order: Print Multiple Copies

You can now print 1, 2 or 3 copies of a Change Order and you will be cued for your selection when you click the Print Change Order button.

Printer Setup	Finalized Change Order - Print Menu Options - View	Print CO	?
hp LaserJet 1320 PCL 6, winspool, Ne02:	Mike & Jessica Potter	Print Change Order	Done
CO Title:	Home Entertainment System	Print Overviews	Print Reports
CO: c1	1285.1c1-1.100	Print Fees	
<b>Proposal Areas &amp; Products Report</b> <input checked="" type="radio"/> Yes <input type="radio"/> No Page Break after each Area <input type="checkbox"/> Products - Do not Sort products by Discipline <input type="checkbox"/> Products - Show Product Install Location <input type="checkbox"/> Text - Hide Area Text <input type="checkbox"/> Text - Show only Area Text - No Products		<b>Change Order</b> Pending CO Title Entering a title will override the default title for this CO and will not affect the Master Project title. <input type="checkbox"/> Show Original Area Text in addition to the CO Area Text 10/12/2009 <input type="checkbox"/> Report Date - Lock	

**Message**

How many copies do you want to print?

321

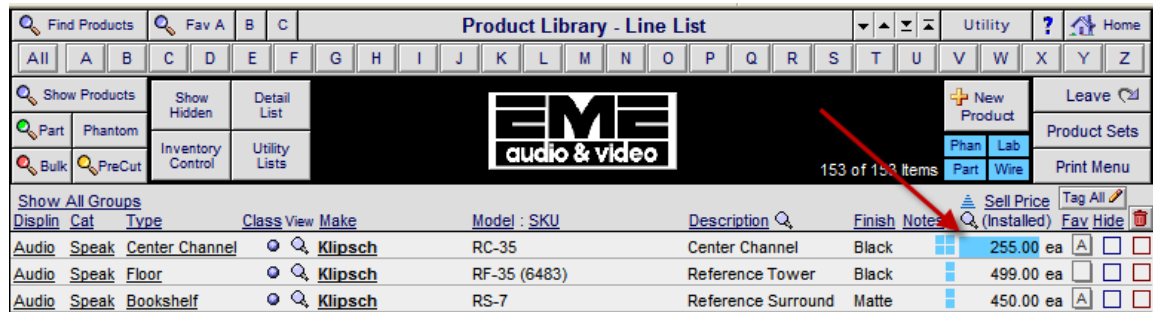
### Enhancement – Proposal/Project/Change Order: Print Menu Button

Proposals and Change Orders need at least one Area in order to print properly. A pop up message will appear notifying you of this if the Print Menu button is clicked within a Proposal, Project or Change Order. If you are trying to have a

proposal with only Fees for instance and no Areas you will need to add an Area and you can name it "Fees" or something like that.

### Enhancement – Product Library/All List screens: Show Phantom Prices

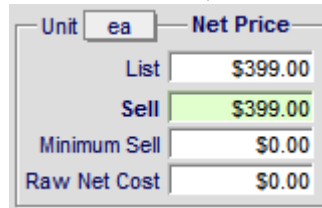
All List screens now show the Phantom Product Prices along with the blue Phantom Indicator.



Displn	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Notes	Sell Price	Tag	All
Audio	Speak	Center Channel			Klipsch	RC-35		Center Channel	Black		255.00 ea	A	
Audio	Speak	Floor			Klipsch	RF-35 (6483)		Reference Tower	Black		499.00 ea		
Audio	Speak	Bookshelf			Klipsch	RS-7		Reference Surround	Matte		450.00 ea	A	

### Enhancement – Product Library/Product Detail: Show \$0 amount

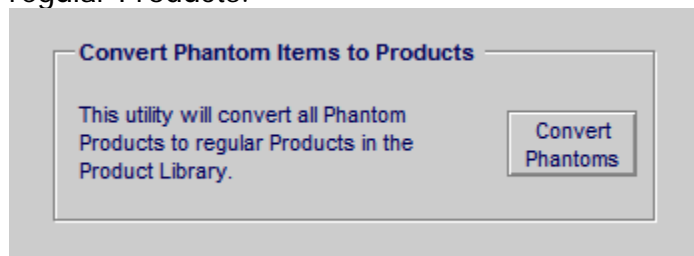
You can now enter a \$0 amount in the Product prices without it blanking the amount. The \$0 will now show.



Unit	ea	Net Price
List		\$399.00
Sell		\$399.00
Minimum Sell		\$0.00
Raw Net Cost		\$0.00

### Enhancement – Product Library/Utility/Update: Convert Phantoms

This utility will convert all of the Phantom Products in your product library to regular Products.



**Convert Phantom Items to Products**

This utility will convert all Phantom Products to regular Products in the Product Library.

**Convert Phantoms**

### Enhancement – Contact/Entities: POS Entities - Show Archived POS

In the Contact/Entities screen, POS Invoices that have been Archived now display an "X" and are sorted to the bottom of the list.

X = Archived		POS Entities			Remaining Balance
View	Entity Kind	Number	Created	Total	
	Quotation	QT #7198	10/10/2009		
	X Quotation	QT #7195	4/25/2007	\$1,675.25	\$1,675.25

## Fix – Master Preferences/Groups: Fill Down

The Fill Down feature now correctly picks the first Class and Phase and changes all of the Groups to those values.

Groups

Labor

Parts

Wire

Tasks

Master Prefs - Product Groups

Utility

Print

Home

Graphics Groups

Create Product Groups (with Classifications & Phases) to organize your Products

Assign Supplements (Labor, Parts, Wire and Tasks) to Product Groups

Assign Product Groups to each product in your Product Library

Done

New

Product Groups

Fill Down

Fill Down

Sort	Rename	Discipline	Category	Type	Product Classification	Primary Install Phase	Products Assigned
a		Audio	Amplifier	Integrated Amplifier	Product	1 Prewire	Y
a		Audio	Amplifier	Multi-channel	Product	1 Prewire	Y
a		Audio	Amplifier	Preamplifier	Product	1 Prewire	Y
a		Audio	Amplifier	Single Channel	Product	1 Prewire	Y
a		Audio	Amplifier	Small Amp	Product	1 Prewire	N
a		Audio	Amplifier	Stereo	Product	1 Prewire	Y
a		Audio	Amplifier	Stereo Receiver	Product	1 Prewire	N

Group Navigator

Show All Disciplines

Select a Discipline

Up

Down

First

Last

First Group 1

## Fix – Proposal/Add New Proposal: Filter Master Pref Overviews

Some user data will create multiple new Overviews of those that are checked as defaults. New programming conditions prevents this from happening.

### Fix – Proposal/Areas & Products/Adding Pure Supplements: Disciplines

When adding pure labor supplements the pop up list that displays Disciplines and allows you to pick one now displays your disciplines properly.

### Fix – Proposal/Areas & Products/Product Detail: Add Parts, Wire

You can now Add Parts, Wire and Tasks to a Product in a Proposal regardless if you cycle through your products using the Prev/Next buttons.

Restore Wire Prices

Proposal - Product Detail - Wire Supplements

2 of 3

Home

Areas

Products

Text

Labor

Parts

Wire

Tasks

Hayes Callahan

1283.1-1.100

Linn : 5101 Personal Handset

Audio : Multi-room : Keypad

Done

C

Prev

Next

Product

Specs

Pfx - PDF's

Labor

Parts

Wire

Tasks

1 - Home Theater

Make

Model

Add

Wire & Cable

Product Qty 1

Only products classified as "Wire" can be added  
Wire & Cable are Itemized

Class	Bulk Run Type	No Labor	Qty	Wire Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell	
Bulk	Home	<input checked="" type="checkbox"/>	150 M	Linn	K10 Cable	Loudspeaker cable	1	3.00	5.00	750.00	<input type="checkbox"/>
Bulk	Home	<input checked="" type="checkbox"/>	150 ft	Monster	16/2 Spkr Wire	2 Conductor Speaker	1	0.15	4.45	67.50	<input type="checkbox"/>
Bulk	Room	<input checked="" type="checkbox"/>	75 ft	Monster	MVQUAD-B DB EZ500	R68 Direct Burial	1	0.60	1.80	135.00	<input type="checkbox"/>
Pre-Cut		<input type="checkbox"/>	1 pr	Linn	Black Interconnect	Pair of phone-phono	3	72.00	120.00	120.00	<input type="checkbox"/>
Pre-Cut		<input type="checkbox"/>	1 pr	Linn	Black Interconnect	Pair of phone-phono	3	72.00	120.00	120.00	<input type="checkbox"/>
Pre-Cut		<input type="checkbox"/>	1 pr	Linn	Black Interconnect	Pair of phone-phono	3	72.00	120.00	120.00	<input type="checkbox"/>



### Fix – Proposal/Custom Reports/A&P with subtotals: Show Discount

The discount amount now is properly displayed on this report.

### Fix – Proposal/Pricing: Correct Discount Amount

When applying a Discount Amount to your proposal the correct amount is now calculated.

### Fix – Proposal/Overviews: Home button Entity Unlock

When using the Overview screen “Home” button the Entity unlock now engages properly.

### Fix – Project/Areas & Products screen: Selection of Areas

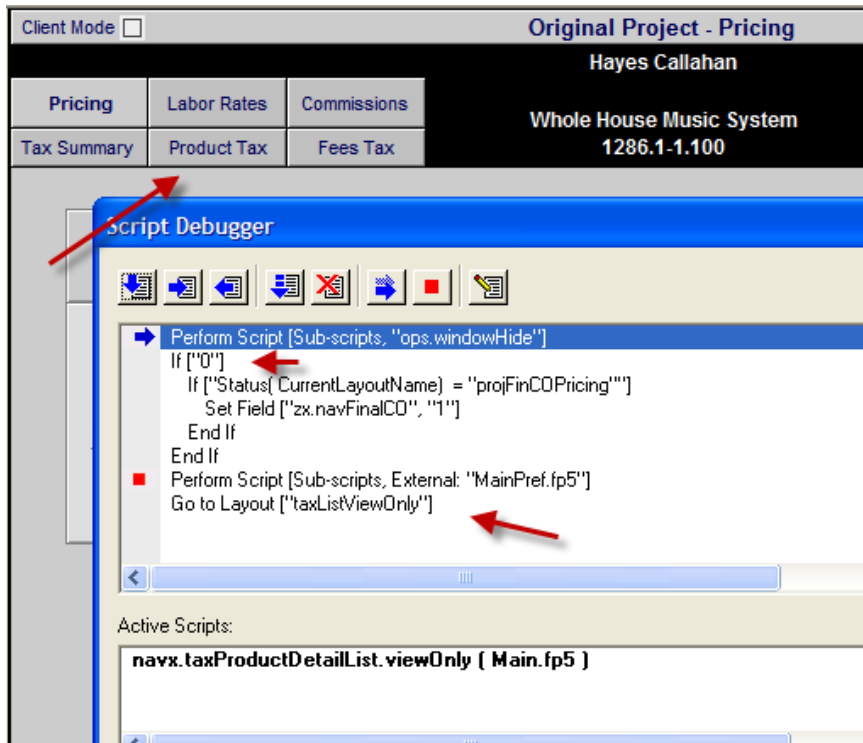
Selecting Areas on the Areas & Products and the Super View screen in Projects now works properly.

Super View		Master Project - Areas - View				Total Labor	Grand Total	? Home		
Areas		Products		Text		John & Mary Smith		Equipment	\$9,142.00	Done
Labor		Parts		Wire		Home Entertainment System		Installation	\$925.00	
				Tasks		1284.1-1.100		Misc. Parts	\$95.00	Labor Time
								Wire & Cable	\$2,271.75	
								Area Total	\$12,433.75	14:52:30
Click on Area name to View Products						Products In: Zone 2 - Living Room				
Location	Zone	Sort	Area			Sort Discipline	Qty	Make : Model		Unit Sell
1	m		Home Theater			m Audio	1 ea	Klipsch : RC-35		
2	m		Living Room					Speaker : Center Channel		\$399.00
3	m		Office			m Audio	2 ea	Klipsch : RF-35		
4	m		Dining Room					Speaker : Floor		\$499.00

Grand Total		Total Labor		Proposal - Areas View On	
\$22,909.95	Equipment	Labor Time		Mil	
\$995.83	Installation	15:20:00			
\$200.00	Misc. Parts				
\$3,041.20	Wire & Cable				
\$27,146.98	Total: Zone 1 - Home Theater				
Pick to Select Area		Zone			
		Products		\$22,909.95	
Zone - Area		Sort Qty	Product Make : Model Description	Unit Sell Ext Sell	
Zone 1 - Basement		1 ea	Linn : 5101 Personal Handset	\$390.00	
Zone 1 - Home Theater		m	Universal learning remote	\$390.00	
		1 ea	Linn : 5125	\$2,750.00	

### Fix – Project/Pricing/Product Tax: Show Tax View Only screen

This button now directs you to the proper Show Tax View Only screen.

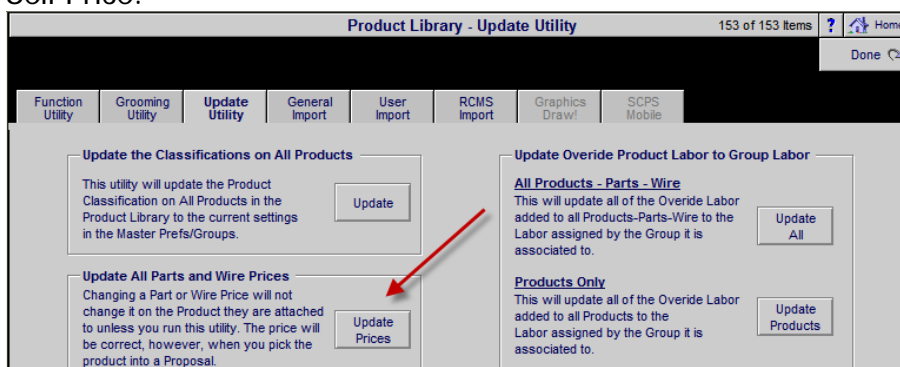


### Fix – Project/Change Orders/Overviews Duplication

When Change Orders are created they no longer automatically pick up the Project Overviews. You will need to add Overviews to Change Orders from the Overviews screen within the Change Order.

### Fix – Product Library/Utility/Update Utility: Update Prices Fix

This price updating routine now uses the Loaded Sell price instead of the Unit Sell Price.



### Fix – Product Library/Product Detail: Replace Data

The Replace Data feature now functions properly because it doesn't refresh the screen which causes the cursor to be moved out of the field you are attempting to replace.

The screenshot shows the 'Product Library - Product Detail' window. The title bar indicates '8 of 153' and includes a 'Home' button. The main area displays product information for 'Linn Akito', including 'Pick up tonearm' and 'Audio : Source : Phono'. A red arrow points to the 'Replace Data' button in the top toolbar. Other buttons include 'Find Products', 'Duplicate Product', 'Delete Product', 'New Product', 'Done', 'Return to List', 'Prev', and 'Next'. Below the product information, there are tabs for 'Product', 'Specs', 'Pix', 'PDF', 'Labor', 'Parts', 'Wire', and 'Tasks'. The 'Product' tab is active, showing fields for 'Make' (Linn), 'Unique Model' (Akito), 'SKU', 'Product Group' (Audio : Sour : Phono), 'Product Classification' (Product), and 'Primary Install Phase' (3 Final).

### Fix – Product Library/Product Detail/Parts: Add Phase

When adding an Additional Part Supplement to a Product the Phase is now automatically entered.

The screenshot shows the 'Additional Parts' table. The table has columns for 'Qty', 'Unit', 'Make', 'Model', 'Description', 'Phase', 'Unit Price', and 'Ext Price'. A red arrow points to the 'Phase' column, which now contains the value '3'. The table contains one row of data: '1 pr Linn Classik Brakit (3459) Wall bracket for UNIK 3 \$40.00 \$40.00'. Above the table, there are fields for 'Make' and 'Model' (Aktiv Modules) and an 'Add' button. A note states: 'Only products classified as "part" can be added'.

### Fix – POS/Service Order: Unique Field correction

These fields now display data properly and are unique. The Service Order report has also been corrected.

The screenshot shows the 'POS - Service Order' window for 'SO #6351'. The title bar includes 'Print Setup', 'Delete SO', 'Done', 'Archive', and 'Home' buttons. The main area displays customer information for 'Dan Black Black/Gideon' and 'Dan Black Black/Gideon'. Below this, there are fields for 'Salesman', 'Project Manager', 'Site Survey By', 'Estimate By', 'Warranty', 'Contractor', 'Contact Super', 'Contact Special', 'Techs/Subs', 'Contractor Ph', 'Super Phone', 'Special Phone', 'Warranty', 'Time Scheduled', 'Date Completed', 'Mileage', and 'Travel Time'. A red arrow points to the 'Date Scheduled' field, which now displays '3/11/2005'. Another red arrow points to the 'Time Scheduled' field, which now displays '1-1-2009'. A third red arrow points to the 'Date Completed' field, which now displays '1-1-2009'. Below these fields, there is a table with columns for 'Visit Date', 'Hours', 'Tech', and 'Notes'. The table contains four rows of data: '1-1-2009 1 Tech: 5 Notes: 9', '1-2-2009 2 Tech: 6 Notes: 10', '1-3-2009 3 Tech: 7 Notes: 11', and '1-4-2009 4 Tech: 8 Notes: 12'.

**SCPS Version 7.7**  
Released: 8/10/2009

**Enhancement – Proposal & CO Area & Products: Pure Supplements**

Pure Supplements are Labor, Parts & Wires that are not assigned to any products, but can be added to any Area in a Proposal. New Pure Supplements screens now enable you to Add Labor, Parts and Wire to **specific Disciplines** in your Proposal.

Super View		Sum View		Auto Build		<b>Proposal - Areas &amp; Products</b>				Labor Total		Grand Total		? Home	
Mike & Jessica Potter						Equipment		\$22,909.95		Done					
Security System						Installation		\$1,438.33							
1282.1-1.100						Misc. Parts		\$455.00							
						Wire & Cable		\$3,108.70		Labor Time					
						Area Total		\$27,911.98		21:35:00					

Loc Zone				<b>Areas</b>				No Prompt							
Pick or Type Area				New Area											
Location	Zone	Sort	Area	Rename	Dup										
	1	m	Basement												
	1	m	Home Theater												

Add Products				Add Sets				Add/View Pure Supplements							
Discipline	Qty	Sort	Make	Model	Ext Sell	Unit Sell	Tag								
Cat : Type	View														
Audio	1 ea		Linn	: S125	\$2,750.00										
Amplifier : Multi-channel															
Audio	5 pr		Linn	: Katan	\$4,975.00										
Speaker : Bookshelf															
Speaker : Bookshelf															
Audio	1 ea		Linn	: Melodik	\$4,950.00										
Speaker : Powered Subwoofe															
Speaker : Powered Subwoofe															
Audio	1														
Supplemental : Items															

When you Add a Labor Discipline you will be prompted to add the labor time. If you select a current Discipline you can add Labor to that Discipline.

<b>Proposal - Pure Labor Supplements</b>										? Refresh	
Mike & Jessica Potter										Done	
Security System											
1282.1-1.100											

Pure Labor		Pure Parts		Pure Wire		<b>Pure Labor Supplements</b>					
Areas		Add Discipline		Disciplines in Zone 1 - Basement							
Pick	Zone - Area	Pick	Discipline			Delete					
	Zone 1 - Basement		Audio	Supplemental : Items							
	Zone 1 - Home Theater		Video	Supplemental : Items							
			Wire & Cable	Supplemental : Items							

Products in Zone 1 - Basement			Labor in Zone 1 - Basement : Audio Discipline						
Make	Model	Phase	Labor Type	Hourly Rate	Phase 1	Phase 2	Phase 3	Total (h:m:s)	Delete
Linn : S125			Installation	\$60.00	2:30:00			=	2:30:00
Audio : Five channel power amplifier (Black)		3	Programming	\$80.00		3:30:00		=	3:30:00
Linn : Katan									
Audio : Bookshelf loudspeakers: pair		3							
Linn : Melodik									
Audio : Aktive isobarik bass extension		3							
Runco : CL-610									
Video : DLP Projector		3							
Total Labor Time:					2:30:00	3:30:00		=	6:00:00
Total Labor Time with DOD:					2:30:00	3:30:00	0:00:00	=	6:00:00
Total Labor Sell:					\$150.00	\$280.00		=	\$430.00

When you add Parts and Wire you are prompted to either keep or change the default Discipline assigned to those Parts & Wire.

**Proposal - Pure Parts Supplements** Refresh Done

Mike & Jessica Potter  
Security System  
1282.1-1.100

1. Pick an Area  
2. Enter a Make & Model  
3. Click Add Part  
4. Pick Discipline to View Parts

**Pure Parts Supplements**

**Areas**

Pick	Zone - Area
	Zone 1 - Basement
	Zone 1 - Home Theater

**Disciplines in Zone 1 - Basement**

Pick	Discipline	Delete
	Audio Supplemental : Items	
	Video Supplemental : Items	
	Wire & Cable Supplemental : Items	

**Products in Zone 1 - Basement**

Make	Model	Phase
Linn : 5125		
Audio : Five channel power amplifier (Black)		3
Linn : Katan		
Audio : Bookshelf loudspeakers: pair		3
Linn : Melodik		
Audio : Aktive isobarik bass extension		3

**Parts in Zone 1 - Basement : Video Discipline**

Parts Make Model Add Part

Qty	Make	Model	Phase	Orig disp	Unit Sell	Ext Sell	
1 ea	Linn	Aktiv Modules			255.00	255.00	
		Stereo or twin mono Aktive crossover	2	Video			

**Proposal - Pure Wire Supplements** Refresh Done

Mike & Jessica Potter  
Security System  
1282.1-1.100

1. Pick an Area  
2. Enter a Make & Model  
3. Click Add Wire  
4. Pick Discipline to View Wire

**Pure Wire Supplements**

**Areas**

Pick	Zone - Area
	Zone 1 - Basement
	Zone 1 - Home Theater

**Disciplines in Zone 1 - Basement**

Pick	Discipline	Delete
	Audio Supplemental : Items	
	Video Supplemental : Items	
	Wire & Cable Supplemental : Items	

**Products in Zone 1 - Basement**

Make	Model	Phase
Linn : 5125		
Audio : Five channel power amplifier (Black)		3
Linn : Katan		
Audio : Bookshelf loudspeakers: pair		3
Linn : Melodik		
Audio : Aktive isobarik bass extension		3

**Wire in Zone 1 - Basement : Discipline**

Wire Make Model Add Wire

Qty	Make	Model	Phase	Unit Sell	Ext Sell	
150 ft	Monster	16/2 Spkr Wire		0.45	67.50	
Bulk	Home	2 Conductor Speaker Wire	1			

## Enhancement – Proposal Detail: New Super View button

The Super View button has been added to the Proposal Detail screen for a direct view of the all of the Areas, Products, Parts and Wire in your Proposal.

Discipline			Area		Phase		Proposal - Detail by Area			Q View		Utility		? Home			
Client		Areas		Fees		Hayes Callahan  Home Theater System 1291.1-1.100					Pricing		Purchasing		Leave		
Project	Details	Products		Area Text							Tracker		Work Orders		Change Orders		
Contact	Log	Supplements		Overviews							Payments		Invoicing		Print Menu		
Zone - Area			Super View		Client Mode							Labor Meter		Labor Total		Grand Total	
Discipline : Category : Type							Qty	Make : Model		Description					Area Totals		
Home Theater System																	
Zone 1 - Home Theater															27,146.98		
Audio : Amplifier : Multi-channel							1 ea	Linn : 5125		Five channel power amplifier (Black)					2,750.00		
Audio : Speaker : Bookshelf							5 pr	Linn : Katan		Bookshelf loudspeakers: pair Bookshelf					4,975.00		
Audio : Speaker : Powered Subwoofer							1 ea	Linn : Melodik		Aktive isobarik bass extension					4,950.00		
Video : Display : DLP Video Projector							1 ea	Runco : CL-610		DLP Projector DLP Projector					7,995.00		
Video : Source : DVD Player							1 ea	Sony : DVP-NS999ES		Progressive Scan DVD Player					1,099.95		
Automation : Remote : Handheld Remote							1 ea	Linn : 5101 Personal Handset		Universal learning remote Universal					390.00		
Automation : Control : Keypad							1 ea	Linn : Knekt RCU		Knekt room control unit Knekt room					750.00		

## Enhancement – Proposal/Areas & Products: Super View & Sum View

The Super View button and Sum View buttons have been added to this screen. The Product listing in the Product Portal has been refined for better clarity.

Super View		Sum View		Auto Build		Proposal - Areas & Products				Labor Total		Grand Total		Home			
						Mike & Jessica Potter						Equipment		\$22,909.95			
<div>Areas</div> <div>Products</div> <div>Text</div>						Security System 1282.1-1.100						Installation		\$995.83			
												Misc. Parts		\$200.00			
Labor		Parts		Wire		Tasks		Wire & Cable						\$3,041.20		Labor Time	
												Area Total		\$27,146.98		15:20:00	
Loc		Zone		Areas				<input type="checkbox"/> No Prompt		Products in the Zone 1 - Home Theater							
<div></div>		<div></div>		Pick or Type Area				New  Area		Add  Products		Add  Sets		Add/View  Pure Supplements			
Location		Zone		Sort		Area		Rename Dup		Discipline		Qty Sort		Make : Model		Ext Sell Tag	
Cat : Type										View						Unit Sell	
<div></div>		1		m		Basement				Audio		1 ea		Linn : S125		\$2,750.00	
<div></div>		1		m		Home Theater				Amplifier : Multi-channel		<div>m</div>		Five channel power amplifier		\$2,750.00	
										Audio		5 pr		Linn : Katan		\$4,975.00	
										Speaker : Bookshelf		<div>m</div>		Bookshelf loudspeakers: pair		\$995.00	
										Audio		1 ea		Linn : Melodik		\$4,950.00	
										Speaker : Powered Subwoofe		<div>m</div>		Aktive isobarik bass extension		\$4,950.00	

## Enhancement – New Super View Screen

The Super View screen enables you to select an Area and view all of the Products, Parts and Wires in that Area, as well as the Products that the Parts and Wires are assigned to (in green)

Super View						Sum View		Done		Proposal - Areas : Products : Supplements - Super View				Labor Total		Grand Total		?		Home																					
Areas		Products		Text		Mike & Jessica Potter										Equipment		\$22,909.95		Done		CU																			
Labor						Parts						Wire						Tasks						Security System										Installation		\$995.83		Done		CU	
																								1282.1-1.100										Wire & Cable		\$3,041.20		Labor Time		15:20:00	
Pick to Select Area						Zone 1 - Home Theater										Total: Zone 1 - Home Theater										\$27,146.98															
						Products				\$22,909.95				Parts Supplements				\$200.00				Wire Supplements				\$3,041.20															
Zone - Area		Sort Qty		Product Make : Model Description		Unit Sell Ext Sell		Qty		Part Make : Model Associated Product		Unit Sell Ext Sell		Qty		Wire Make : Model Associated Product		Unit Sell Ext Sell		Qty		Wire Make : Model Associated Product		Unit Sell Ext Sell																	
Zone 1 - Basement				1 ea Linn : S101 Personal Handset		\$390.00		1 ea Linn : IR Repeater		\$85.00		150 m Linn : K10 Cable		\$5.00																											
Zone 1 - Home Theater		m		Universal learning remote		\$390.00		1 ea Linn : Knekt RCU		\$85.00		Bulk Wire Linn : S101 Personal Handset		\$750.00																											
		1 ea		Linn : S125		\$2,750.00		1 ea Linn : Knekt RCU Metalwork		\$20.00		1 ea Linn : Black Interconnect		\$120.00																											
		m		Five channel power amplifier (Black)		\$2,750.00		Linn : Knekt RCU		\$20.00		Pre-Cut Linn : S125		\$120.00																											
		5 pr		Linn : Katan		\$995.00		1 ea Linn : Phono Plugs-Standard		\$95.00		1 pr Linn : Black Interconnect		\$120.00																											
		m		Bookshelf loudspeakers: pair		\$4,975.00		Linn : Melodik		\$95.00		Pre-Cut Linn : S125		\$120.00																											
		1 ea		Linn : Knekt RCU		\$750.00						1 pr Linn : Black Interconnect		\$120.00																											
		m		Knekt room control unit		\$750.00						Pre-Cut Linn : S125		\$120.00																											
		1 ea		Linn : Melodik		\$4,950.00						1 pr Linn : Black Interconnect		\$120.00																											
		m		Aktive isobarik bass extension		\$4,950.00						Pre-Cut Linn : S125		\$120.00																											

## Enhancement – New Sum View Screen

The Sum View screen enables you to view the sum of all “like kind” Products in your Proposal. You can switch between the Sum View and Show All View. You can also Print a report of this screen.

Super View		Sum View		Show All		Proposal - Product Sum View										Print				?		Home	
Mike & Jessica Potter																				Done			
Areas		Products				Text				1282.1-1.100													
Labor		Parts		Wire		Tasks																	
Zone - Area						Qty		Make : Model						Description									
						2 ea		Linn : 5101 Personal Handset						Universal learning remote									
						2 ea		Linn : 5125						Five channel power amplifier (Black)									
						10 pr		Linn : Katan						Bookshelf loudspeakers: pair									
						2 ea		Linn : Knekt RCU						Knekt room control unit									
						2 ea		Linn : Melodik						Aktive isobarik bass extension loudspeaker									
						2 ea		Runco : CL-610						DLP Projector									
						2 ea		Sony : DVP-NS999ES						Progressive Scan DVD Player									

Super View		Sum View		Show All		Proposal - Product Sum View				Print				?		Home	
Mike & Jessica Potter						Done											
Areas		Products		Text		1282.1-1.100											
Labor		Parts		Wire		Tasks											
Zone - Area				Qty		Make : Model				Description							
1 - Basement				1 ea		Linn : 5125				Five channel power amplifier (Black)							
1 - Basement				5 pr		Linn : Katan				Bookshelf loudspeakers: pair							
1 - Basement				1 ea		Linn : Melodik				Aktive isobarik bass extension loudspeaker							
1 - Basement				1 ea		Runco : CL-610				DLP Projector							
1 - Basement				1 ea		Sony : DVP-NS999ES				Progressive Scan DVD Player							
1 - Basement				1 ea		Linn : 5101 Personal Handset				Universal learning remote							
1 - Basement				1 ea		Linn : Knekt RCU				Knekt room control unit							
1 - Home Theater				1 ea		Linn : 5125				Five channel power amplifier (Black)							
1 - Home Theater				5 pr		Linn : Katan				Bookshelf loudspeakers: pair							
1 - Home Theater				1 ea		Linn : Melodik				Aktive isobarik bass extension loudspeaker							



## Enhancement – New Change Order/Areas & Products screen.

The Change Order Areas & Products screen has been refined to provide better clarity. The Original Project is on the top and the Change Order is now all on the bottom of the screen. Navigation buttons as well as the Super View and Sum View buttons have been added to the Change Order section.

**Original Project - Areas & Products**

Pick an Area to modify, then Add a Product or Change an existing Product.

Add a new Area below and Add Products, Sets & Supplements

**John & Mary Smith**

**Audio Distribution System**  
1284.1-1.100

Pick	Location Zone	Areas	CO Add Product	CO Change Qty	Status	Qty	Make : Model	Unit Sell
	1	Home Theater				1 ea	Linn : 5125	
	2	Living Room				1 ea	Linn : Classik Music-S	
	3	Office				1 ea	Linn : Melodik	
	4	Dining Room				5 pr	Linn : Katan	
	4	Kitchen				1 ea	Linn : Klimax Chakra 500 Twin-BindPost	
	5	Master Bedroom				1 ea	Linn : Melodik	
	5	Master Bathroom				1 ea	Linn : Melodik	
						1 ea	Runco : CL-610	
						1 ea	Runco : CL-610	

**Zone 1 - Home Theater**

Discipline	Cat.Type	View	Status	Qty	Make : Model	Ext Sell	Unit Sell	Tag
Audio	Amplifier : Multi-channel			1 ea	Linn : 5125		\$2,750.00	
Audio	Source : CD Player			1 ea	Linn : Classik Music-S		\$1,550.00	
Audio	Speaker : Bookshelf			5 pr	Linn : Katan		\$995.00	
Audio	Amplifier : Stereo			1 ea	Linn : Klimax Chakra 500 Twin-BindPost		\$7,995.00	
Audio	Speaker : Powered Subwoofe			1 ea	Linn : Melodik		\$4,950.00	
Audio	Speaker : Powered Subwoofe			1 ea	Linn : Melodik		\$4,950.00	
Video	Display : DLP Video Projec			1 ea	Runco : CL-610		\$7,995.00	

**Pending Change Order - Areas & Products**

**John & Mary Smith**

**Audio Distribution System**  
1284.1c1-1.100

**Zone 2 - Living Room**

Discipline	Cat.Type	View	Status	Qty	Make : Model	Ext Sell	Unit Sell	Tag
Audio	Speaker : Powered Subwoofe			1 ea	Klipsch : RSW-10		\$1,000.00	
Audio	Speaker : Powered Subwoofe			2 ea	Linn : Melodik		\$1,000.00	
Audio	Speaker : Powered Subwoofe			2 ea	Linn : Melodik		\$1,000.00	

**Zone 2 - Living Room Total: \$1,543.75**

**Equipment** \$1,000.00  
**Installation** \$130.00  
**Misc. Parts** \$95.00  
**Wire & Cable** \$318.75

**Super View** **Sum View** **Labor Total** **Grand Total**

**Areas** **Products** **Text**

**Labor** **Parts** **Wire** **Tasks**

**Zone 2 - Living Room**

**Add** **Products** **Add** **Sets** **Add** **Pure Supplements**

**Location Zone** **Sort** **Areas** **Rename Del**

**Loc** **Zone** **No Prompt** **Pick or Type Area** **New** **Area**

**Discipline** **Cat.Type** **View** **Status** **Qty** **Make : Model** **Ext Sell** **Unit Sell** **Tag**

**Audio** **A** **1 ea** **Klipsch : RSW-10** **\$1,000.00** **Option**

**Speaker : Powered Subwoofe** **m** **Reference Subwoofer** **\$1,000.00**

**Audio** **A** **2 ea** **Linn : Melodik** **\$1,000.00** **Option**

**Speaker : Powered Subwoofe** **m** **\*Option: Ext Price 9,900.00**

## Fix – Proposal/Area & Product/Pure Supplement: Adding Disciplines

Version 7.6 had a bug that did not show the disciplines so that you could select one of them for your Labor, Parts or Wire. This has been corrected.

## Fix – Proposal/Area & Product report: Blank \$0.00 amounts

If a Product has a \$0.00 amount it will show as blank on a proposal so that it doesn't interfere with the Option label that is positioned over the amount field.

## Fix – Proposal/Clear Make & Model field in Pure Supplements screens

Clear default data when navigating to the Parts and Wire Supplements screens in Main.



### Fix – Proposal/Duplication: All Pricing Preferences Duplication

When duplicating a Proposal, all Pricing Preferences in that proposal come forward to the new duplicated proposal.

Proposal Prefs - Contract Subtotals			?	Home
Cover Page	Fees	Contract	Mike & Jessica Potter	
Client Intro		Terms	Security System	
Shop Intro	Extra Pages	Pricing	1282.1-1.100	

Contract Prices		Do not show Contract Price Section <input type="checkbox"/>
Header Label	Price Guarantee	
Prices quoted are guaranteed until	60 Days	Prices Quoted Text <input type="checkbox"/> Do Not Show Date <input type="checkbox"/>
Estimated	Products & Installation prices are estimated. Total price will consist of installed products & actual installation. All labor, materials, trip charges and Monster Cables listed within this proposal are estimates only. An actual bill for all labor, materials, trip charges and cables will be hand written for each day of work and is due upon completion of each workday.	
Guaranteed	Products & Installation prices are guaranteed. Total price will not exceed the quoted price.	

Prices Quoted are  
☒ Estimated  
☐ Guaranteed

### Fix – Product Library/Find Products: Show all

If you don't find the product you are searching for, you now will be shown all of your products instead of no products so that you can continue to add or delete at that point.

### Fix – RCMS Product Library Import: Listen Up - Make Capitals Letters

The RCMS Listen Up Product Import Grooming routine has been modified to force the Make into all Capital letters as they appear in the RCMS data.

### Fix – RCMS Product Library Import: Duplicate Product Deletion

When a Product was created in the SCPS Product Library by duplicating an existing Product, the RCMS import routine was deleting it. This has been fixed. Special Note: If you are creating products in SCPS that are not in RCMS to set your SCPS Master Prefs/Bookkeeping/RCMS Delete flag to "No". However if you are using the SCPS Project pump up to RCMS it is necessary to make sure that the product exists in RCMS so this setting should be set to "Yes".

Delete/Hide Dead Products when Importing RCMS Products
<input type="radio"/> No <input type="radio"/> Delete/Hide Dead Products
When Importing Products from the RCMS database into the SCPS Product Library all Products in the SCPS Product Library that are not in the RCMS Import will be Deleted from the SCPS Product Library unless they are in a Proposal/Project/Completed Project. In that case they will simply be Hidden in the SCPS Product Library.
Set this Flag to No if you want to retain all the old unused products, but it is recommended that you set this to Yes Delete/Hide dead products. If this flag is set to Yes or is Blank then the Delete/Hide feature will be engaged.

**SCPS Version 7.6v3**  
**Released: 7/23/2009**

**Fix – Wire Script: ops.upgrade utility.deleteBlankMake/ModelWireSups**

Change Wire field zi.wiSupMakeModelEmpty.c to not delete Product Groups during the upgrade routine. Case((IsEmpty(zi.wi.Make.c) or IsEmpty(zi.wi.Model.c)) and IsEmpty(zk.onePrefPdKind.cc),1)

**SCPS Version 7.6v2**  
**Released: 7/22/2009**

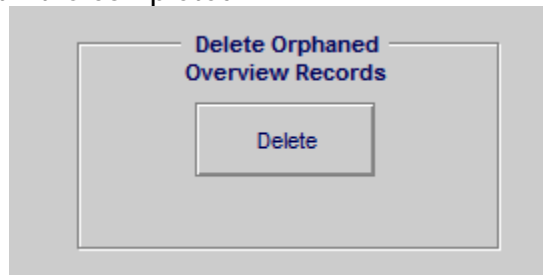
**Fix – Proposal/Area & Products: Area Navigation buttons**

The new buttons that enable you to cycle from Area to Area have been modified to cycle through all of the areas.

**SCPS Version 7.6**  
**Released: 7/20/2009**

**Enhancement – Proposal/Overviews: Delete Orphaned Overviews**

Overviews that are not attached to Proposals can build up as records in your Text Library and slow down your SCPS. This Text/Utility will remove them and they should not build up again after this upgrade. This routine will run automatically during the 7.6 upgrade process and may increase the upgrade time a bit, so let it run until it is completed.



"ops.upgrade.groomOrphanedOverviews"

```
⚡ Perform Script [Sub-scripts, "ops.allowUserAbort [freeze]"]
⚡ Set Error Capture [On]
⚡ Go to Next Field
⚡ Enter Find Mode []
⚡ Set Field ["zk.onePrefSys.f", "1"]
⚡ Perform Find [Replace Found Set]
⚡ If ["not Status(CurrentError)"]
⚡   Sort [Restore, No dialog]
⚡   Go to Record/Request/Page [First]
⚡   Loop
⚡     If ["text.category.ae & "" & text.title & Case{zk.mProp.f, "" & zk.mProp.f} = zx.tempMulti.g"]
⚡       Delete Record/Request [No dialog]
⚡     Else
⚡       Set Field ["zx.tempMulti.g", "text.category.ae & "" & text.title & Case{zk.mProp.f, "" & zk.mProp.f}"]
⚡       Omit Record
⚡     End If
⚡   Exit Loop If ["not Status(CurrentFoundCount)"]
⚡ End Loop
⚡ End If
```

**2 blank  
spaces**

### Enhancement – Master Preferences/Other/Misc 1: Turn off Timer

SCPS will exit in 90 seconds if a user opens SCPS and does not log in. This prevents SCPS from tying up a workstation license. In some cases companies that use Terminal Services may want to allow the workstation to stay at the log in screen and this feature enables you to defeat the Log in Timer.

Master Prefs - Misc 1			
Products 1	Misc 1	3rd Party 1	Counters
Products 2	Misc 2	3rd Party 2	Graphics

Alternate Logo Screen	
Enable alternate Logo Screen	<input type="checkbox"/>
This logo screen has a different button layout then the default Logo Screen	

User Log In Screen Timer	
Turn off Log in screen Timer	<input checked="" type="checkbox"/>
If a User does not Log into SCPS, at the main Log in screen, SCPS will exit after 90 seconds. This checkbox turns off that feature.	

### Enhancement –Proposal/Pricing: Tax included Total

You can now choose to show the Tax amount on a Proposal included in the Grand Total on the Proposal Contract and Proposal Subtotal reports.

Equipment	\$14,260.00
Installation	\$1,230.00
Misc. Parts	\$315.00
Wire & Cable	\$610.00
Additional Fees	\$768.20
Total Including Tax	\$18,086.03







Master Preferences/Proposal/Pricing: Show Tax in Grand Total setting.

Include Sales Tax in the Grand Total	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Do not show tax separately	Blank = No	

Proposal/Pricing/Print Options: Show Tax in Grand Total setting.

<b>Sales Tax</b>	
Show Sales Tax	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Contract Tax Totals	AB Tax
Include Sales Tax in the Grand Total	<input checked="" type="radio"/> Yes <input type="radio"/> No
Do not show tax separately	

 Contract
--

<b>Subtotal Summary</b>	
	Discipline
	Area
	Phase
<b>Grand Total Summary</b>	
	Discipline
	Area
	Phase

## Enhancement – Proposal/Areas &Products: Prev Next Portal buttons

You can now cycle through all of the Proposal Areas using these buttons. This enables checking a long list of Areas much easier. This new feature is also on the Area Text screen and the Alt Areas & Products screen.

**Proposal - Areas & Products**

Thomas Dow  
Chippewa Valley Eye Clinic  
Home Entertainment System  
1273.1-1.100

Labor Total: \$7,047.03  
Grand Total: \$7,047.03  
Equipment Installation: \$722.50  
Misc. Parts: \$105.00  
Wire & Cable: \$1,218.70  
Area Total: \$9,093.23  
Labor Time: 11:22:30

Loc: Zone: Pick or Type Area New Area

Location	Zone	Sort	Area	Rename	Dup	Del
	1	m	Home Theater			
	2	m	Living Room			
	3	m	Office			
	4	m	Dining Room			
	4	m	Kitchen			
	5	a	Master Bedroom			
	5	b	Master Bathroom			

Zone 3 - Office

Add Products Add Sets Add Supplements

Discipline	Cat	Type	Sort	Qty	Make	Model	Unit Sell	Ext Sell	Tag
Audio			m	1 ea	Linn	Classik Movie Di-B		\$3,635.45	
Amplifier	Surround Receive					Integrated multi-channel DVD-CD		\$3,635.45	
Audio			m	1 ea	Linn	Classik Speaker Package		\$2,047.50	
Speaker	5.1 System					Complete 5 speaker surround		\$2,047.50	
Video			m	1 ea	Sony	KV-27FS13		\$500.49	
Display	TV GT 27 Inch					27 FD Trinitron® WEGA® TV		\$500.49	
Video			m	1 ea	Sony	SLV-N99		\$181.09	
Source	VCR					VHS Video Cassette Recorder		\$181.09	
Automation			m	1 ea	Linn	Knekt RCU		\$682.50	
Control	Keypad					Knekt room control unit		\$682.50	

**Proposal - Area Text**

Burkes  
Sunbelt Business Brokers  
Home Entertainment System  
1328.1-1.100

Clear All Proposal Area Text

Areas Products Text Labor Parts Wire Tasks

Pick 1 - Pick Area 2 - Pick Text Category 3 - Pick Audio Text

Pick	1 - Pick Area	2 - Pick Text Category	3 - Pick Audio Text
	Atrium	Audio	CD-100 disc changer
	Bathroom 3	Commercial Sound	Speaker - bookshelf
	Bathroom 6	Control	Speaker - ceiling

## Enhancement – Proposal: Currency Symbols for Options

Master Prefs/Misc 2 screen now has a setting for Currency Symbols for Proposal Option Products. A blank setting defaults to \$. Please note that Proposals can be changed to use other currency Symbols by using the Custom Reports module.

**Master Prefs - Misc 2**

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

Custom Proposal System Access

Enable direct access to CPS ☐

Please contact Horizon if you wish to have access to your old CPS Proposals

Users must have the CPS 7.9v1 or later files in the "SCPS #" folder along with the SCPS data files. FileMaker Pro Server users must not have more than 50 fp5 files in the Pro Server folder.

Users must have the Enable CPS checkbox checked on this screen in SCPS and the Enable SCPS checkbox checked in the CPS/Setup/Other Defaults 1 screen.

When upgrading SCPS, users must copy all of the files, with names that begin with cps, from their current SCPS folder and paste them into their new SCPS folder.

☐ Display CPS Labor and Phase on Product Library: Labor Detail & Detail List

Open RCMS Files

RCMSIkip.fp5 Do not Open ☐  
RCMSpmpup.fp5 RCMS Files

Currency Symbol

Currency Symbol £ Blank = \$

This setting changes the Proposal "Option Product" listing

Proposal - Product - Pure Labor Supplements				
Ron Efron				
Home Entertainment System 1290.1-1.100				
Labor	Parts	Wire	Pure Labor in Atrium <span style="float: right;">Refresh</span>	
<b>1 Areas</b>				
Pick Area	Zone - Area		Add Labor Discipline	2 Labor Disciplines in Atrium
	Atrium		Pick Discipline	Delete
	Bathroom 1		Audio	Supplemental : Items
			Automation	Supplemental : Items
<b>Products in Atrium</b>				
Make	Model	Phase		
Linn	Knekt RCU	2		
Audio :				
<b>3 Labor in Audio Discipline</b>				
Add Labor to the Audio Discipline			Total (Hrs.)	Delete
Labor Type	Hourly Rate	Phase 1	Phase 2	Phase 3
Installation	\$60.00	1.00.00		= 1.00.00
Training	\$100.00			= 3.30.00

## Enhancement – Proposal/Product Detail/Labor: Redesign screen

The Labor Detail screen within a Proposal has been redesigned for improved clarity. The Delete button has also been moved and a new scroll bar on the right has been added.

Alt Labor View	Primary Phase: 2 Trim		Proposal - Product Detail - Labor Supplements						1 of 1 ? Home	
Areas		Products	Rudy & Cecilia Defiglia 1294.1-1.100						Labor Sub Cats	
Labor		Parts	Linn : Knekt RCU Automation : Control : Keypad						Done	
Wire		Tasks							Prev Next	
Product		Specs	Pix - PDF's		Labor		Parts	Wire	Tasks	Atrium
Add Labor Supplement			Total Phase 1+2+3 Labor for 1 ea Linn : Knekt RCU						Refresh up dn	
Labor Type Total DOD: 0%	Labor		Delete 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		1:00:00	1:00:00	\$30.00	\$30.00	\$60.00	\$60.00	
2 - Programming	\$40.00	\$80.00		0:30:00	0:30:00	\$20.00	\$20.00	\$40.00	\$40.00	
4 - Parts Labor	\$30.00	\$50.00		0:30:00	0:30:00	\$15.00	\$15.00	\$25.00	\$25.00	
5 - Wire Labor - Bulk	\$35.00	\$60.00		1:20:00	1:20:00	\$46.67	\$46.67	\$80.00	\$80.00	
Phase 1+2+3 Total Labor:				3:20:00	3:20:00	\$111.67	\$111.67	\$205.00	\$205.00	
Phase 1 Prewire Labor for 1 ea Linn : Knekt RCU										
Labor Type Phase 1 DOD: 0%	Labor		Unit Time	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	0:30:00	0:30:00	0:30:00	\$15.00	\$15.00	\$30.00	\$30.00	
2 - Programming	\$40.00	\$80.00	0:00:00	0:00:00	0:00:00					
4 - Parts Labor	\$30.00	\$50.00	0:00:00	0:00:00	0:00:00					
5 - Wire Labor - Bulk	\$35.00	\$60.00	1:15:00	1:15:00	1:15:00	\$43.75	\$43.75	\$75.00	\$75.00	
Phase 1 Prewire Totals:				1:45:00	1:45:00	\$58.75	\$58.75	\$105.00	\$105.00	

## Enhancement – Proposal Labor Rates: 2 Rates added for a total of 5

2 additional Labor Rate structures have been added to the Master Prefs/Labor Rates screen and the Proposal Labor Rates screen. These 2 additional Labor Rate Structures have also been added to the Contact/Proposal Defaults screen.

Master Prefs - Labor Rates											
Labor Supplements		Labor Rates		Labor Sub Cats		Labor DOD		Done			
		Default		Hourly Rates 2		Hourly Rates 3		Hourly Rates 4		Hourly Rates 5	
		Basic Rate		Inner City Rate		Prewire only		Hourly Rate 4		Hourly Rate 5	
Labor Categories		Cost	Sell	Cost	Sell	Cost	Sell	Cost	Sell	Cost	Sell
1 - Installation		\$30	\$60	\$40	\$80	\$15	\$30	\$40	\$80	\$75	\$110
2 - Programming		\$40	\$80	\$50	\$100	\$15	\$30	\$45	\$85	\$80	\$115
3 - Training		\$50	\$100	\$60	\$120	\$15	\$25	\$55	\$90	\$85	\$120
4 - Parts Labor		\$30	\$50	\$30	\$60	\$15	\$25	\$60	\$95	\$90	\$125
5 - Wire Labor - Bulk		\$35	\$60	\$35	\$70	\$15	\$25	\$65	\$100	\$95	\$130
6 - Wire Labor - Precut		\$40	\$60	\$35	\$70	\$15	\$25	\$70	\$105	\$100	\$140
		Default Labor Time									
		Labor Time (hrs.min.sec)									
4 - Parts Labor		0:00:10		Parts per Each							
5 - Wire Labor - Bulk		0:00:30		Bulk per Foot							
6 - Wire Labor - Precut		0:05:00		Precut per Pair							
<p>Tip: It is only necessary to populate the Default Hourly Labor Rate 1. You can assign Rates 1,2,3 to any Contact, so Proposals can be created for that Contact, with the specified Labor Rates. You can also change the Rates in a Proposal from the Proposal/Pricing/Labor screen. Prices in the Product Library are based on the Default Labor Rate 1.</p>											

Reset Project to Prefs			Proposal - Project Info			Print	?
Client		Project		Tom Burke			Done
Details		Contacts		Sunbelt Business Brokers			
		Com Log		Home Entertainment System			
				1292.1-1.100			
<b>Proposal-Project Title</b> Home Entertainment System				<b>Installation Phases</b>			
<b>Installation &amp; Payment Type</b> New-3 Phase Pre-Trim-Final				<b>Install Start Dates</b> 1 - Prewire <input type="text"/> 2 - Trim <input type="text"/> 3 - Final <input type="text"/> Target Project Completion Date..... <input type="text"/>			
<b>Hourly Labor Rates</b> <input type="radio"/> 1 Basic Rate <input checked="" type="radio"/> 2 Inner City Rate <input type="radio"/> 3 Prewire only <input type="radio"/> 4 Hourly Rate 4 <input type="radio"/> 5 Hourly Rate 5				Blank = Default 1			
				<b>Install Notes</b> <input type="text"/>			



Reset Rates to Master Prefs

**Proposal - Labor Rates**

Tom Burke  
Sunbelt Business Brokers  
Home Entertainment System  
1292.1-1.100

Done

Pricing Labor Rates Commissions  
Tax Summary Product Tax Fees Tax

**Hourly Labor Rates** Blank = Default 1

☐ 1 Basic Rate  
☒ 2 Inner City Rate  
☐ 3 Prewire only  
☐ 4 Hourly Rate 4  
☐ 5 Hourly Rate 5

Labor Categories	Hourly Rate 1 Basic Rate		Hourly Rate 2 Inner City Rate		Hourly Rate 3 Prewire only		Hourly Rate 4 Hourly Rate 4		Hourly Rate 5 Hourly Rate 5	
	Cost	Sell	Cost	Sell	Cost	Sell	Cost	Sell	Cost	Sell
1 - Installation	\$30.00	\$60.00	\$40.00	\$80.00	\$15.00	\$30.00	\$40.00	\$80.00	\$75.00	\$110.00
2 - Programming	\$40.00	\$80.00	\$50.00	\$100.00	\$15.00	\$30.00	\$45.00	\$85.00	\$80.00	\$115.00
3 - Training	\$50.00	\$100.00	\$60.00	\$120.00	\$15.00	\$25.00	\$55.00	\$90.00	\$85.00	\$120.00
4 - Parts Labor	\$30.00	\$50.00	\$30.00	\$60.00	\$15.00	\$25.00	\$60.00	\$95.00	\$90.00	\$125.00
5 - Wire Labor - Bulk	\$35.00	\$60.00	\$35.00	\$70.00	\$15.00	\$25.00	\$65.00	\$100.00	\$95.00	\$130.00
6 - Wire Labor - Precut	\$40.00	\$60.00	\$35.00	\$70.00	\$15.00	\$25.00	\$70.00	\$105.00	\$100.00	\$140.00

**Labor Meter**

Labor Percentage of Equipment  %

**Contacts - Proposal Preferences**

Hayes Callahan

Set Default Preferences for creating Proposals with this Contact

Done

Client Info Com Log Entities Transactions Prop Prefs

Prev Next 2 of 29

**Proposal Labor Rate**

☒ 1 Basic Rate  
☐ 2 Inner City Rate  
☐ 3 Prewire only  
☐ 4 Hourly Rate 4  
☒ 5 Hourly Rate 5

Labor Category	Basic Rate	Inner City Rate	Prewire only	Hourly Rate 4	Hourly Rate 5
1 - Installation	\$60.00	\$80.00	\$30.00	\$80.00	\$110.00
2 - Programming	\$80.00	\$100.00	\$30.00	\$85.00	\$115.00
3 - Training	\$100.00	\$120.00	\$25.00	\$90.00	\$120.00
4 - Parts Labor	\$50.00	\$60.00	\$25.00	\$95.00	\$125.00
5 - Wire Labor - Bulk	\$60.00	\$70.00	\$25.00	\$100.00	\$130.00
6 - Wire Labor - Precut	\$60.00	\$70.00	\$25.00	\$105.00	\$140.00

## Enhancement – Proposal/Payments: Refine Screens and Updaters

### Master Preferences/Payment screen: User Procedures

It is necessary to fill in all of the Payment Step fields to Match the number of Installation Phases regardless of entering a % into that payment step.

- Do not create more Payment Steps than Installation Phases.
- Fill the Payment Steps from the left to the right.
- Enter Payment Steps to match the Installation Phases even if there is no % in a Payment Step.

-Terms fields, for payments, should be filled out and may exceed the size of the field with 2 lines of text.

### Proposal/Payment screen:

Change the Payment Labels and Percentage lookup fields, so they refresh when the Update button is clicked.

Proposal/Payments: Add Pop Up messages to the Payment Update and Install Type Update buttons.

The screenshot shows the 'Master Prefs - Payment Director' window. It contains a table titled 'Proposal - Payment Steps' with columns for 'Deposit', 'Step 1', 'Step 2', 'Step 3', 'Holdback', and 'Total must equal 100%'. The table lists various installation types and their corresponding payment percentages and terms. A red arrow points to the 'Update' button at the bottom right of the screen.

The screenshot shows the 'Proposal - Project Info' window. It contains fields for 'Client' (Rudy Defiglia), 'Project' (Home Entertainment System), and 'Installation Phases' (1 - Prewire, 2 - Trim, 3 - Final). A red arrow points to the 'Update' button next to the 'Installation & Payment Type' field. A message box is overlaid on the screen, stating: "Please Note: It is necessary to actually 're-select' the Installation Type...before you run this updater...to ensure that the Install Type is pulled into this Proposal from the Master Preferences. Click Update if you have already done this or Cancel to 're-select' the Install Type."

Clear All Manual Payment Amounts **Proposal - Payment Terms**

**Dealer Payment Plans** **Rudy & Cecilia Defiglia** **Done with Update**

**Home Entertainment System** **Installation Type**  
**1294.1-1.100** **New-3 Phase Pre-Trim-Final**

Payment Method	Payment Steps				
	Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback
Percentage	Deposit	Payment 1	Payment 2	Payment 3	Hold Back
Payment Labels	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
Payment Description					
Percentage Total: 100%	10 %	20 %	25 %	35 %	10 %
Total Payments: \$8,334.03	Amount \$833.40	Amount \$1,666.81	Amount \$2,083.51	Amount \$2,916.91	Amount \$833.40

**Payment Step Director Settings**

Step 1	Step 2	Step 3
1	2	3
Director	Director	Director

**Message**

Please Note: If you have changed the Installation Type settings in the Master Preferences...it will be necessary to update the Installation Type, in the Proposal-Project screen of this Proposal, to reflect those changes.

Click Update to Update the Payments or Cancel to go to the Proposal-Project screen.

**Phase 3 Total \$**

Totals	
Proposal	\$8,334.03
- Payments	\$8,334.03
<b>Difference Must = \$0</b>	<b>\$0.00</b>

### Enhancement – Proposal/Details & Print Menu/Shop: Site Directions

The Site Directions fields on both Detail and Site Direction reports have been increased to accommodate more directions.

### Enhancement – Project & POS: Change Order: Printed Title Option

You can now modify the title of Pending and Final Change Orders on the Printed CO's. This feature is global, so changing the Master Preference setting will change all of your current and future Project and POS CO's.

Master Prefs - Other - Projects 2						? Home
Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters	Done
Proposal 2	<b>Projects 2</b>	Products 2	Misc 2	3rd Party 2	Graphics	

**Change Order Preferences**

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

☐ Do Not Show the Change Order Numbers on the Areas & Products Report (global pref)

**Change Order & Sales Invoice Label**

Check to not display label

☐ "Credit Card Type"

☐ "Credit Card Number"

**Change Order Title**

Change the Title of Project Change Orders on Pending & Final CO's  
 This setting is global and will affect all of your current CO's  
 Blank Default = Change Order

Modified Invoice

<p><b>Modified Invoice Number</b> 1284.1c2-1.100</p> <p><b>EME Audio &amp; Video Systems</b>          2950 Mall Drive          Eau Claire, WI 54701          Phone: 715-287-3335</p>	<p><b>Modified Invoice</b></p>	<p><b>Date</b> 6/9/2009</p>
<p><b>Sold To:</b></p> <p>John &amp; Mary Smith</p> <p>Home Entertainment System</p>		
<p><b>Ext Price</b></p>		

**ZONE 1 - HOME THEATER**

<u>Qty</u>	<u>Ext. Price</u>
------------	-------------------

### Enhancement – Product Library: Pop Up: Show Phantom Product

When you click on the sell price of a product in the Product Library list the Pop Up Info screen now shows if the product is a Phantom Product.

**Installed Price (please expand window to show prices)**

EME  
Phantom 1  
Product with only Parts

Phantom Product

Product Price: \$255.00 ea

Total Parts Price: \$.00  
Total Wire Price: \$480.00  
Total Labor: \$92.50  
=====

Total Installed Price: \$827.50 ea

Date Modified: 4/27/2009

### Enhancement – Product Library/Price List Utility: Sort Dates

You can now sort this screen by Creation Date, Modified Date or by User making it easier to find who and when Products were created or modified.

Find Products Fav A B C Product Library - Price List Utility

All A B C D E F G H I J K L M N O P Q R S

Show Products

Part Phantom

Bulk PreCut

Price List Group List Value List No Values Pix Path

All Product Groups

Dept	Cat	Type	Status	View	Class	Make	Model	Description
Video	Displ	DLP Video Projec						
			Created: 10/30/2001					
			Modified: 4/27/2009					
			By: Jim Engandela					
			Key: 798					
Autom	Remot	Touch Screen Con						
			Created: 10/30/2001					

Message

Sort By:

Created Date  
Modified Date  
User

User Modified Created

### Enhancement – Product Library/Utility: Update Parts & Wire Labor

This utility will update only the Parts & Wire in the product library that do not have a Labor Time associated with them.

Update Labor on Wire & Parts Products

Update Only Blank Parts & Wire

This will update only the Parts in the product library, to the default time in Prefs/Labor, that are blank.

Update Blank Parts & Wire

Parts

This will update all of the Parts in the product library, to the default time in Prefs/Labor

Update Parts

Bulk Wire

This will update all of the Bulk Wire in the product library, to the default time in Prefs/Labor

Update Bulk Wire

PreCut Wire

This will update all of the Precut Wire in the product library, to the default time in Prefs/Labor

Update Precut Wire

## Enhancement – Product Library/Detail: Replace Vendor Data

You can now replace the Alt Vendor or Optional Cost Vendor data on all of the selected products using this utility.

Find Products

Replace Data

Product Library - Product Detail

4 of 451

Home

Duplicate Product

Delete Product

Creston

C2N-DB12

Decorator Keypad 12 Button

Automation : Control : Keypad

New Product

Done

Return to List

Prev

Next

Product

Specs

Pix

PDF

Labor

Parts

Wire

Tasks

Make

Creston

Unique Model

C2N-DB12

QB Item

Finish

Specify

Description

Decorator Keypad 12 Button

Features

Decora, 12 Buttons, Touch Settable ID (TSID)

Available Models

A-Almond, B-Black, W-White

Product Group

Autom: Contr: Keypad

Product Classification

Product

Primary Install Phase

2 Trim

Favorite

Fee SKU

Proposal Sort

m

Phantom Product

Tax A

T

Tax B

T

Do not Hide

Hide this Product

Do not Delete

New Product Flag

Do not Discount

Issue Staple Up Card

Purchasing Lead Days

7

Cost Value

Optimum On-Hand Qty

ReOrder Point

Inventory Qty On-Hand

Qty to Order

Alt PO Vendor

Sonance

Unit

ea

Net Price

Loading Calculator

Loaded Price

Product & Supplements

Installed Price

List

Adjustment Type

%

Sell

\$260.00

50.0%

Sell

\$260.00

GP

50.0%

Cost

\$130.00

Minimum Sell

\$

GP

Cost

Raw Net Cost

\$130.00

Product

\$260.00

Parts

\$105.00

Wire

\$120.00

Product

\$260.00

P&W

\$225.00

Labor

\$200.00

Total

\$685.00

Optional Cost

From

Storage for other costs from another Vendor

Product Cue Notes

(20 line max)

Installed GP

50.6%

Total Installed Cost

\$338.25

## Enhancement – Contact Library/Detail: Replace Contact Data

You can now replace Contact data on all of the selected products using this utility just like you can in the Product library.

**Contacts - Contact Detail**

Tom Burke  
Sunbelt Business Brokers

Category: Clients Class: Key: ID: Fav: A

PO Vendors? Assign Products Group: Status: Staff: SE Tickler: Tag:

Company: Sunbelt Business Brokers Vendor #: Web Address: Web:

Fav Merge SL Title Mister First Name Tom Last Name Burke Job Title eMail Address Per: tom@burke.to wk: tom@scc.to eMail:

### Enhancement – POS/Quotations and Sales Invoice Footers

Remove the footers on POS Quotations and Sales Invoices so that they print without clipping product line items at the page breaks.

### Enhancement – POS/Purchase Orders: Increase Line Items to 100

The number of PO items that can be placed on a PO has been increased from 25 to 100. New scroll bars on the right have been added to all POS invoices.

**POS - Purchase Order** PO #7178

Ship To: Shop Warehouse:

ADI  
1 City View Drive  
Etobicoke, ON M9W 5A5

**Increase PO to 100 line items**

EME Audio & Video Systems  
100 Purchasing Lane  
Purchasing City, WI 567937  
Ph: 715-287-3335 Ext:  
Fax: 715-287-4464  
email: horizon@trivest.net

9/22/2005

Need By: 9/26/2005 Reference #: Palter/Lipson Ship VIA: FOB: Terms: Buyer: Chad Trude Receive All:

Pick	Qty	unit	Product Description	Unit Cost	Ext Cost	Qty Rcvd	Qty Open
2	ea	Channel vision : DP-RBOX-II : Flush mount box for DP series Doorphone	13.63	27.26		2	
1	ea	Channel vision : DP-900x : Surface mount box for DP series Doorphone	13.63	13.63		1	

### Enhancement – POS/All Invoice Lists: Post Totals with Home button

When leaving all invoicing using the Home button the Total of the Invoice is posted to the Invoice List the same way it is when using the Done button.

### Enhancement – POS/Purchase Orders: Reference Field Label

You can now change the Reference field label in the Master Preferences/POS/POS 1 screen to suit. If it is empty the default label will be "Reference".

**Purchase Orders**

Purchase Order "Reference" field Label

Account

Print Setup Delete PO Duplicate PO POS - Purchase Order OPEN 1 of 5

Print Store Copy Preview

PO #7193

Ship To: Shop Warehouse:

BTX  
5 Skyline Drive  
Hawthorne, NY 10532  
United States

EME Audio & Video Systems  
100 Purchasing Lane  
Purchasing City, WI 567937  
Ph: 715-287-3335 Ext:  
Fax: 715-287-4464  
email: horizon@trivest.net

9/29/2005

Need By Account Ship VIA FOB Terms Buyer Receive All

Tina McKnight

Pick	Qty	unit	Product Description	Unit Cost	Ext Cost	Qty Rcvd	Qty Open
1	ea		Male D-SUB 9 pin screw terminal connector	15.95	15.95		1

### Enhancement –POS Purchase Orders: Vendor Account #

You can now set the Vendor Account Number on the Contact/Entity Preferences screen and this account number will be automatically entered into the POS/Purchase Order/References (Account Number) field.

Contacts - Proposal Preferences

Tom & Kelly & Family Burkes  
Sunbelt Business Brokers

Set Default Preferences for creating Proposals or POS with this Contact

Client Info Com Log Transactions Entities Entity Prefs

Proposal Labor Rate

	Labor Category	Basic Rate	Inner City Rate	Prewire only
Set Default <input type="radio"/> 1 Basic Rate <input type="radio"/> 2 Inner City Rate <input type="radio"/> 3 Prewire only <input type="radio"/> 4 <input type="radio"/> 5	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 - Precut	\$60.00	\$70.00	\$25.00

Clear Default Proposal Alternate Billing Contact

Set Default Contact Company Sort

EME Audio & Video Systems  
Horizon  
Burkes, Tom & Kelly & Family  
Callahan, Hayes

Sunbelt Business Brokers

POS Purchase Orders

Vendor Account Number

1111

Print Setup Delete PO Duplicate PO POS - Purchase Order CLOSED 1 of 1

Print Store Copy Preview

PO #7199

Ship To: Shop Warehouse:

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

Home: 831-659-8595  
Work: 831-624-5600  
Cellular: 831-601-8337  
Fax: 831-624-3880

EME Audio & Video Systems  
100 Purchasing Lane  
Purchasing City, WI 567937  
Ph: 715-287-3335 Ext:  
Fax: 715-287-4464  
email: horizon@trivest.net

6/8/2009

Need By Account Ship VIA FOB Terms Buyer Receive All

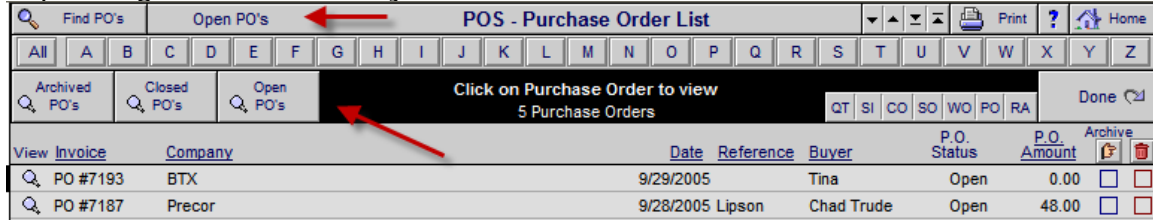
1111 Joe Buyer

Pick	Qty	unit	Product Description	Unit Cost	Ext Cost	Qty Rcvd	Qty Open
------	-----	------	---------------------	-----------	----------	----------	----------



### Enhancement – POS/Purchase Orders: Open & Closed Alpha Finder

A new button has been added to this screen that enables you to switch back and forth between Open PO's and Closed PO's and this is displayed above as well. This switch also enables the Alpha Finder to find Open and Closed PO's depending on which mode you are in.



Find PO's	Open PO's	POS - Purchase Order List	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
Archived PO's	Closed PO's	Open PO's	Click on Purchase Order to view												Done											
5 Purchase Orders												QT	SI	CO	SO	WO	PO	RA								
View Invoice	Company	Date	Reference	Buyer	P.O. Status	P.O. Amount	Archive																			
PO #7193	BTX	9/29/2005		Tina	Open	0.00	<input type="checkbox"/>																			
PO #7187	Precor	9/28/2005	Lipson	Chad Trude	Open	48.00	<input type="checkbox"/>																			

### Fix – SCPS Log In screen: Location Sort Order

User Locations above 10 now sort after 1-9 instead of before 1-9.

### Fix – Proposal/Pick Supplements

Under some circumstances...Picking a Product classified as a Part or Wire into a Proposal was not adding the labor supplements because the pd.supplabHrs.i was empty. This has been corrected.

### Add

Upgrade routine to automatically set all empty Parts & Wire pd.supplabHrs.i during the upgrade process. This routine is now also in the Product Library Utility/Update screen.

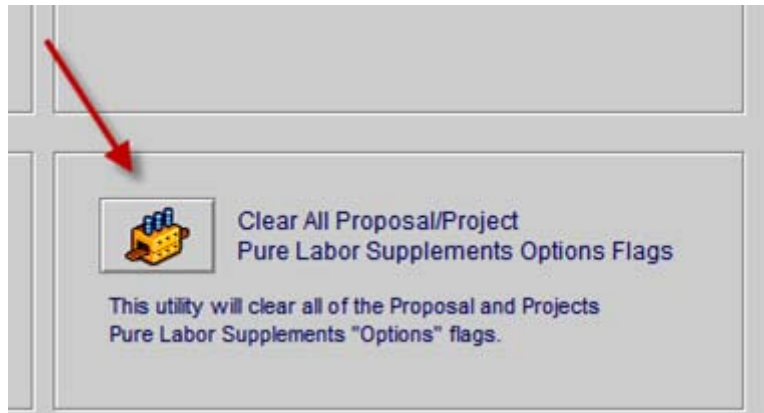
### Fix – Proposal/Pure Labor Supplement: Clear Option Flags Utility

Under some circumstances Pure Labor Supplements have Option flags on them and they should not. This utility will clear them from all proposals and there is a utility on the Pure Labor Supplement screen to clear them from a specific proposal.



**SmartPartner SOFTWARE**  
High Definition Proposal & Project Management System

Point of Sale	Contacts	Proposals	Product Library	Master Tracker
Forms	Follow-up	Projects	Sets Library	Project Manager
Info Library	Letter Library	Completed	Text Library	CPS Software
Preferences	GraphicsDraw	Archives	User Utility	User Login



Proposal Pure Labor Supplement screen

All Labor in Atrium			
or Discipline	Total Time (h:m:s)	Ext Sell	Clear All Supplements Option Flags
	2:00:00	\$120.00	<input type="checkbox"/>
	1:00:00	\$80.00	<input type="checkbox"/>
	1:00:00	\$50.00	<input type="checkbox"/>

### Fix – Proposal/Option Products Rounding

Under some circumstances Option Products were rounding to 3 digits. This has been corrected.

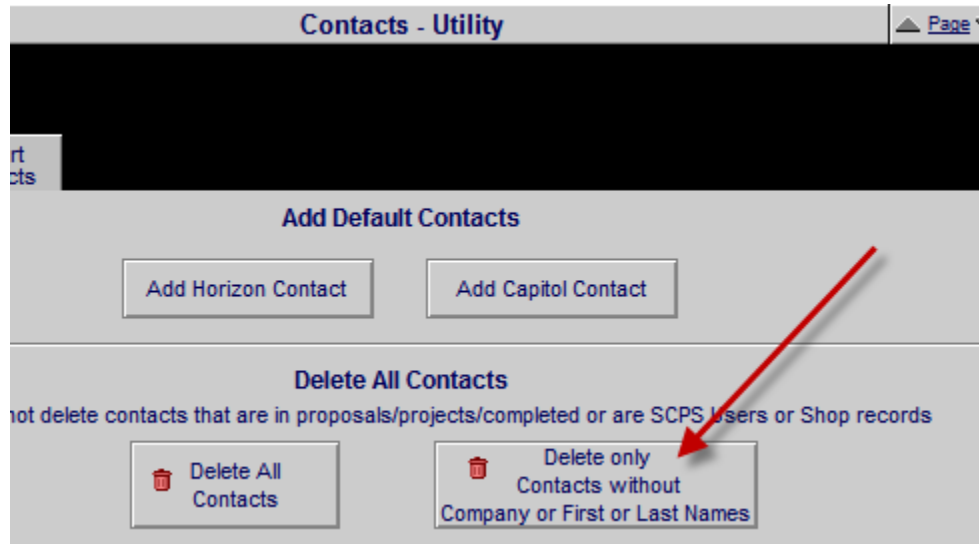
Home Entertainment System 1324.1-1.5			
Client Mode	Payments	Invoicing	Print Menu
	Labor Meter	Labor Total	Grand Total
Qty	Make : Model	Description	Area Totals
2 ea	KLIPSCH : R-1800-C	*Option: Ext Installed Price \$354.988*	4,539.04
1 ea	SONY : STR-DA2400ES	7.1 Channel A/V Receiver7.1 Channel	799.99

### Fix – Product Library/Print Menu: Correct Sell Price

All reports now display the correct Product Sell & Cost Price when the auto pricing calculator is used to set the Sell and Cost prices.

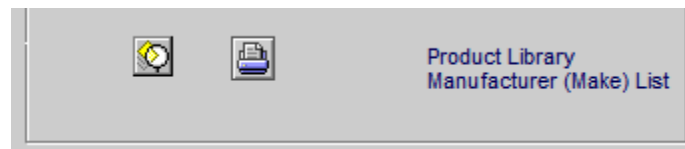
### Fix – Contacts/Utility: Delete Blank Contacts

This utility now properly deletes contacts with no first, last or company name.



### Fix – Contact/Print Menu: Vendor Report

The Vendor Report has been renamed to Product Library Manufacturers (Make) List, because it is a report of all of the Manufacturers in your Product Library. If you want a report of Contacts categorized as “Vendor” you should first find those Vendors using the Find Contacts button and then print any of the other Print Menu reports.



Horizon Software		6/8/09
Product Library Manufacturer (Make) List		
Crestron		
DirectTV		
EME		
Klipsch		
Linn		
Middle Atlantic		
Monster		
Runco		
Sonance		
Sony		
Widget		
Yamaha		

### Fix – Delete blank Wire Records that do not have Make or Model

This routine will run during the 7.6 upgrade and it will automatically delete any wire supplement records in your proposals that do not have a Make and Model number.

### **Fix – RCMS: Project Pump Up: Tax “T” flag corrected for new RCMS rev**

The Tax “T” code has now been fixed to match the correct field in the latest RCMS revision.

## **SCPS Version 7.5 Released: 4/29/2009**

### **Enhancement – Proposal/Project “Client Mode” : Hide Prices**

You can now use the Client Mode checkbox to hide Cost prices and GP% in your Proposals, Projects and Change Orders. This enables you to work on them in front of your clients without fear of revealing costs.

The Client Mode screens are the Pricing screen, the Product List screen, the Product Detail screen and the Discipline, Area and Phase screens.

There is a Client Mode checkbox in the Client screen, the Utility screen, the Pricing screen and Product List and Product Detail screens to enable or disable this feature.

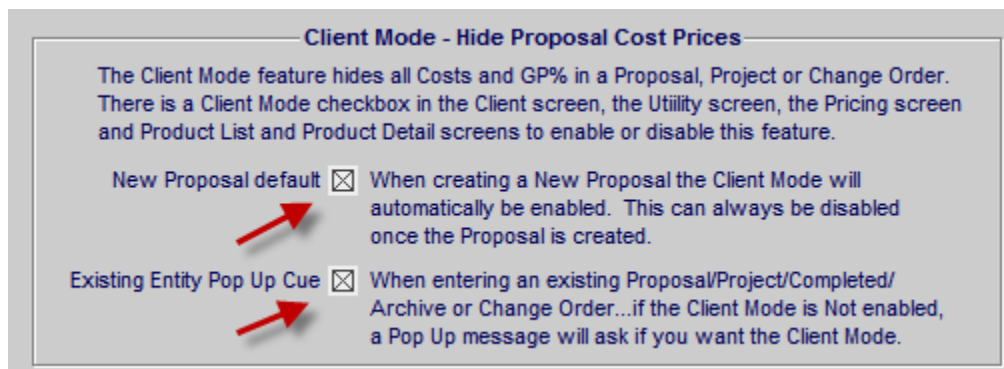
### **Master Preferences/Other/Proposal 2**

#### **New Proposal default**

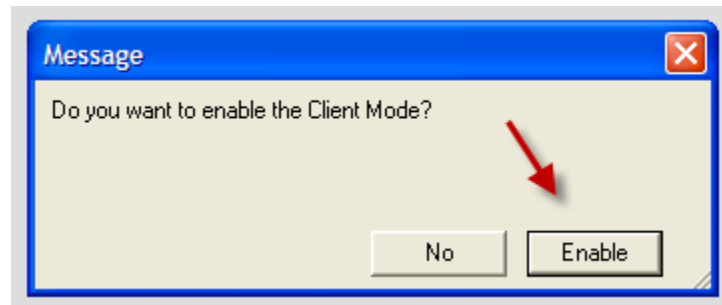
When creating a New Proposal the Client Mode will automatically be enabled. This can always be disabled once the Proposal is created.

#### **Existing Entity Pop Up Cue**

When entering an existing Proposal/Project/Completed/Archive or Change Order...if the Client Mode is Not enabled, a Pop Up message will ask if you want the Client Mode.



## Pop Up Cue when entering a Proposal/Project/Completed/CO



## Client Mode checkbox's

Discipline	Area	Phase	Proposal - Detail by Area		Q View	Utility	?	Home
Client	Areas	Fees	Ron Efron		Pricing	Purchasing	Leave	
Project	Products	Area Text	Home Entertainment System		Payments	Work Orders	Tracker	
Com Log	Supplements	Overviews	1290.1-1.100		Change Orders	Invoicing	Print Menu	
Zone - Area			Client Mode <input checked="" type="checkbox"/>	Labor Meter	Labor Total	Grand Total		
Discipline : Category : Type			Qty	Make : Model	Description	Area Totals		
Home Entertainment System								
Atrium			15,120.00					
Automation : Control : Keypad			2 ea	Linn : Knekt RCU	Knekt room control unit	Knekt room	14,000.00	

Alt Billing	Client Mode Hide <input checked="" type="checkbox"/>	Proposal - Client Info		Print	?	
Client		Details		Joel Roberts		
Project		Contacts		Home Entertainment System		
Com Log				1291.1-1.100		
Client		Modify or Switch Contact		Created	4/1/2009	Done
First Name		Joel		Modified	4/1/2009	
Last Name		Roberts		Sold		
Company				Completed		Follow-Up
Proposal Name		Joel Roberts				
Fav Format		First Name + Last Name				
Address						
Numbers						
Home Phone		715-263-9876		Ext		
Work Phone				Ext		
Mobile		715-287-2222				
Fax						
Other				Ext		
Radio ID#						

## Before and After Views the Client Mode Hides Prices

Client Mode <input type="checkbox"/>		Proposal - Pricing		Print	?	Home
Mr. Jim Engandela		Horizon Software		Done		
Home Entertainment System		1267.1-1.100				
Pricing	Labor Rates	Commissions				
Tax Summary	Product Tax	Fees Tax				
Proposal - Pricing				Show Discount <input checked="" type="radio"/> yes <input type="radio"/> no		
				Show Sales Tax <input checked="" type="radio"/> yes <input type="radio"/> no		
				Labor Meter		
Subtotals	Sell	GP%	Cost	Profit	Discount	
Equipment	\$36,535.89	40.6%	\$21,692.40	\$14,843.49		
Installation	\$4,013.33	46.6%	\$2,142.71	\$1,870.63		
Misc. Parts	\$1,353.33	40.4%	\$807.00	\$546.33		
Wire & Cable	\$6,606.65	44.5%	\$3,666.69	\$2,939.96		
Additional Fees	\$2,885.39	50.0%	\$1,442.70	\$1,442.70		
Total	\$51,394.60	42.1%	\$29,751.50	\$21,643.11		
Tax	\$2,182.91					
Grand Total	\$53,577.51					
				\$51,494.60 List Price		
				-\$100.00 Courtesy Discount		
				\$51,394.60 Total		

Client Mode ☒ **Proposal - Pricing** Print ? Home

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

Done

Pricing	Labor Rates	Commissions
Tax Summary	Product Tax	Fees Tax

**Proposal - Pricing** Show Discount ☒ yes ☐ no  
Show Sales Tax ☒ yes ☐ no  
Labor Meter

Subtotals	Sell	Discount
Equipment	\$36,535.89	-\$100.00
Installation	\$4,013.33	
Misc. Parts	\$1,353.33	
Wire & Cable	\$6,606.65	
Additional Fees	\$2,885.39	
<b>Total</b>	<b>\$51,394.60</b>	
Tax	\$2,182.91	\$51,494.60 List Price
<b>Grand Total</b>	<b>\$53,577.51</b>	-\$100.00 Courtesy Discount
		<b>\$51,394.60 Total</b>

Before and After Views the Client Mode Hides Prices

Delete Product Client Mode ☐ **Proposal - Product Detail** 2 of 24 ? Home

Jim Engandela Horizon Software  
1267.1-1.100  
Sony : DVP-NS999ES  
Video : Source : DVD Player

Done

Prev Next

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

**1 - Home Theater**

Qty   
Make   
Model   
SKU   
Finish   
Description   
Features   
Install Location

Group   
Product Classification   
Primary Install Phase   
Purchasing Lead Days   
Vendor   
Product Sort   
Staple Card ☐  
Do not Discount ☐  
Show Product as Option ☐  
Tax A  + Tax B   
Sony : DVP-NS999ES : Progressive Scan DVD Player : Black

Unit	Unit Price	Product Unit Price w/Adjustment	Parts Unit Total	Wire Unit Total	Unit Installed Price Product Parts & Wire
EA	List \$1,199.95				
	Sell \$1,099.95	\$1,099.95		\$120.00	\$1,219.95
	Minimum Sell \$999.95			\$5.00	\$35.00 GP%
	Loaded Cost \$620.40			\$125.00	\$1,254.95 43.7%
	Raw Cost \$620.40			0:05:00	0:35:00
	Discount -\$100.00				
	Sell GP% 43.6%				
	Extended Qty 1				
	Ext Sell \$1,099.95	\$1,099.95		\$120.00	\$1,219.95
	Ext Labor \$30.00	\$30.00		\$5.00	\$35.00 GP%
	Ext Installed \$1,129.95	\$1,129.95		\$125.00	\$1,254.95 43.7%
	Ext Labor Time 0:30:00			0:05:00	0:35:00
	Parts Cost				
	Wire Cost				
	Unit \$0.00				
	Extended \$72.00				

Client Mode ☒
2 of 24 ? Home

**Proposal - Product Detail**  
 Jim Engandela Horizon Software  
 1267.1-1.100  
 Sony : DVP-NS999ES  
 Video : Source : DVD Player

Areas: Products Text  
 Labor Parts Wire Tasks

**Product** Qty: 1  
 Make: Sony  
 Model: DVP-NS999ES  
 SKU:  
 Finish: Black  
 Description: Progressive Scan DVD Player  
 Features: The new DVP-NS999ES player offers a variety of advanced technical features available from the leader in innovative home entertainment. Technical advancements include Precision Cinema Progressive output and multi-channel SACD playback, as well as Pixel-by-Pixel Active IP Conversion for sharp and detailed video projection, and Audio-Video Alignment to produce precise  
 Install Location:

**1 - Home Theater**  
 Group: Video : Source : DVD Player  
 Product Classification: Product  
 Primary Install Phase: 3 Final  
 Purchasing Lead Days:  
 Vendor: Sony Inc  
 Product Sort: m  
 Staple Card:  
 Do not Discount:  
 Show Product as Option:  
 Tax A: T + Tax B: T  
 Sony : DVP-NS999ES : Progressive Scan DVD Player : Black

Unit	Unit Price	Product Unit Price w/Adjustment	Parts Unit Total	Wire Unit Total	Unit Installed Price Product Parts & Wire
EA	List \$1,199.95 Sell \$1,099.95	\$1,099.95		\$120.00 \$5.00	\$1,249.95 \$35.00
		Installed \$1,129.95		Installed \$125.00	Installed \$1,254.95
		Labor Time 0:30:00		0:05:00	0:35:00

Extended Qty	Product Ext Price w/Adjustment	Parts Ext Total	Wire Ext Total	Extended Installed Price Product Parts & Wire
1	Ext Sell \$1,099.95 Ext Labor \$30.00 Ext Installed \$1,129.95 Ext Labor Time 0:30:00		\$120.00 \$5.00 \$125.00	\$1,249.95 \$35.00 \$1,254.95

Before and After Views the Client Mode Hides Prices

Alt Prod View Client Mode ☐
All 24 Products ? Home

**Proposal - Products**  
 Jim Engandela Horizon Software  
 Home Entertainment System  
 1267.1-1.100

Areas: Products Text  
 Labor Parts Wire Tasks

Adjust Selected Prices Update All Products Done  
 Replace Selected Products Delete All Options Product Total \$36,535.89

View Delete	Replace Product Option	Zone - Area Discipline Description	Make Category	Model Type Class	Product Labor Parts Labor Wire Labor	Unit List Min Sell Unit Cost	Adjusted Sell Unit Sell GP%	Extended Sell Ext Installed Ext Discount
<input type="checkbox"/>	<input type="checkbox"/>	1 - Home Theater	Runco	CL-610	\$110.00	\$7,995.00	\$7,995.00	
<input type="checkbox"/>	<input type="checkbox"/>	Video	Display	DLP Video Projector	\$0.00	\$7,995.00	\$8,105.00	
<input type="checkbox"/>	<input type="checkbox"/>	DLP Projector	DLP Projector	3 Product	\$99.95	\$4,797.00	40.0%	

Show All		Alt Prod View		Client Mode <input checked="" type="checkbox"/>		Proposal - Products				All 24 Products		Home					
Areas		Products		Text		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100				Adjust Selected Prices		Update All Products		Done			
Labor		Parts		Wire						Tasks		Replace Selected Products		Delete All Options		Product Total \$36,535.89	
View Delete		Replace Product		Zone - Area <u>Discipline</u> Description		Make <u>Category</u>		Model <u>Type</u> <u>Phase</u> <u>Class</u>		Product Labor Parts Labor Wire Labor		Unit List Min Sell		Adjusted Sell Unit Sell		Extended Sell Ext Installed Ext Discount	
		1 ea		1 - Home Theater		Runco		CL-610		\$110.00				\$7,995.00		\$7,995.00	
<input type="checkbox"/>				Video		<u>Display</u>		DLP Video Projector		\$0.00				\$7,995.00		\$8,105.00	
		<input type="checkbox"/>		DLP Projector		DLP Projector		3 Product		\$99.95							

Before and After Views the Client Mode Hides Prices

Discipline	Area	Phase	Master Project - by Discipline Subtotals				Print	Home
Subtotals	Subtotals	Subtotals	Mr. & Mrs. Christenson North American Fly LTD Home Entertainment System 1284.1-1.100					Done
Grand Totals	Grand Totals	Grand Totals						Client Mode
Discipline			Sell	Cost	GP%	Labor (hrs:min:sec)		
Home Entertainment System			Equipment	92,300.77	42,861.40	53.6%		
			Installation	5,050.83	2,519.17	50.1%		
			Misc. Parts	1,428.33	859.00	39.9%		
			Wire & Cable	10,110.20	5,298.63	47.6%		
			Additional Fees	4,697.56	2,904.93	38.2%		
			Total	\$113,587.70	54,443.13	52.1%	74:40:00	
			Tax	\$5,988.96				
			Grand Total	\$119,576.66				

Discipline	Area	Phase	Master Project - by Discipline Subtotals		Print	Home	
Subtotals	Subtotals	Subtotals	Mr. & Mrs. Christenson North American Fly LTD Home Entertainment System 1284.1-1.100			Done	
Grand Totals	Grand Totals	Grand Totals				Client Mode	
Discipline		Sell	Labor (hrs:min:sec)				
Home Entertainment System		Equipment	92,300.77				
		Installation	5,050.83				
		Misc. Parts	1,428.33				
		Wire & Cable	10,110.20				
		Additional Fees	4,697.56				
		Total	\$113,587.70				74:40:00
		Tax	\$5,988.96				
Grand Total		\$119,576.66					

All Fees Screens have a Client Mode. New fees cannot be added to this screen so you will want to make as many Fee Presets in the Master Preferences/Fees as needed. You can always switch to the Client Mode off to add fees.

Proposal - Project Fees - Client Mode								Print		?		Home	
Ron Efron												Done	
Home Entertainment System													
1290.2-1.100													
Project Fees													
Pick	Project Fee Type	Fee SKU	Phase	Description	Fee Total	Direct to Parts Subtotal							
<input checked="" type="checkbox"/>	Design/Engineering		1	Design and Engineering of the following electronic systems: Home Theater, Whole House Music, Cable TV Distribution, Phone/Intercom Distribution and	\$200.00	<input type="checkbox"/>							
<input type="checkbox"/>	Documentation		2	Digital Photos of the prewire and final installation taken, cataloged and stored on the our server. Detailed photos of significant details of the installation that		<input type="checkbox"/>							



## Enhancement – Log In and Prefs/Users screens: Additional Features

A Sort User field has been added that enables you to Sort the Users in the List as you like.

Sort by Options:

First Name

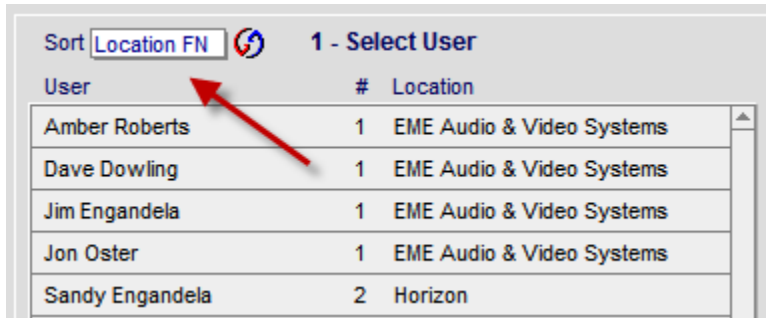
Last Name

Location & First Name

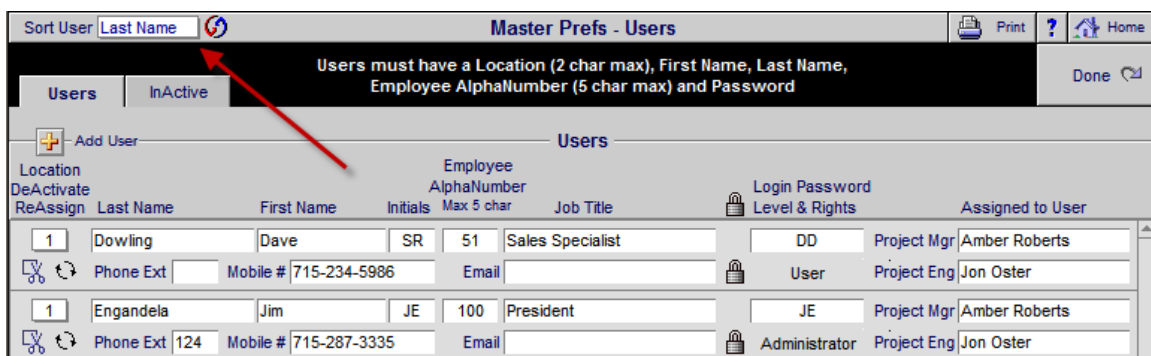
Location & Last Name

The Location name has been added to the User list and more Users are displayed in the portal without scrolling.

Click on the Refresh icon after making your Sort Selection. This User Sort feature has also been added to the Master Preferences/User screens.



User	#	Location
Amber Roberts	1	EME Audio & Video Systems
Dave Dowling	1	EME Audio & Video Systems
Jim Engandela	1	EME Audio & Video Systems
Jon Oster	1	EME Audio & Video Systems
Sandy Engandela	2	Horizon



Sort User: Last Name [Refresh]

Master Prefs - Users

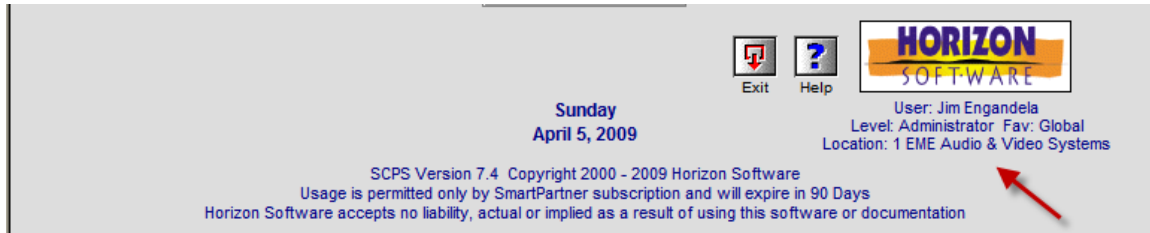
Users must have a Location (2 char max), First Name, Last Name, Employee AlphaNumber (5 char max) and Password

Users

Location	DeActivate	ReAssign	Last Name	First Name	Initials	Employee AlphaNumber Max 5 char	Job Title	Login Password Level & Rights	Assigned to User
1			Dowling	Dave	SR	51	Sales Specialist	DD	Project Mgr Amber Roberts
			Phone Ext	Mobile #			Email	User	Project Eng Jon Oster
1			Engandela	Jim	JE	100	President	JE	Project Mgr Amber Roberts
			Phone Ext	Mobile #			Email	Administrator	Project Eng Jon Oster

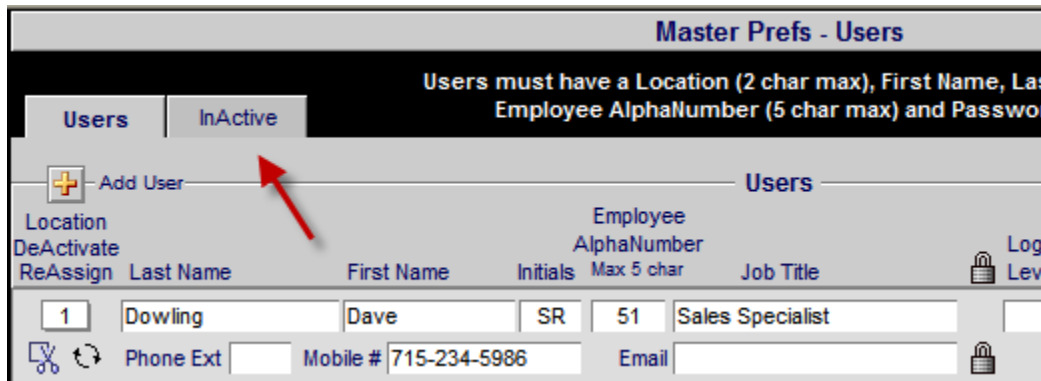
## Enhancement – Logo and all Screen Headers: Additional User info

The Location number and name has been added to the User info on all screens.



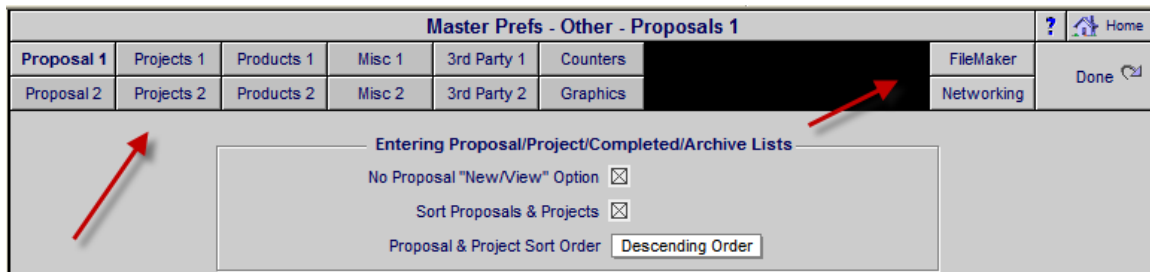
## Enhancement – Master Prefs/Users: InActive User Tab

The InActive Users screen is now accessible from a Tab on the User screen.



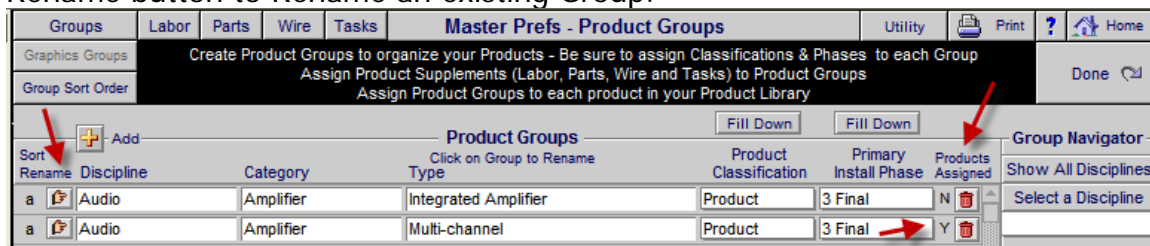
## Enhancement – Master Prefs/Other: Network and FileMaker buttons

The Networking and FileMaker screen buttons have been moved to the Prefs/Other screen.



## Enhancement – Master Prefs/Groups: Products Assigned to Groups

There now is a Y/N flag on each Group that indicates whether or not there are Products in your Product Library that have been assigned to that Group. A Rename Group button has also been added. Click on the Group or on this Rename button to Rename an existing Group.



## Enhancement – Master Prefs/Groups: Rename Group

When Renaming a Group you can now click on the Cancel button to Return directly to the Group List.

**Name Product Group**  
Old Product Group:  
Audio - Amplifier - Integrated Amplifier

Discipline	Category	Type	Product Classification	Primary Install Phase
Audio	Amplifier	Integrated Amplifier	Product	3 Final

*Do not exceed field lengths and do not enter carriage returns*

**Message**

This Product Group already exists.

Click "Rename" to change the Discipline, Category or Type.

Click "Cancel" to return to Group List screen.

## Enhancement – Proposal/Project List: Post Totals with Home button

The Home button within the Proposal/Project screen now will post the Proposal/Project Grand total to the Proposal/Project List screen if the total is empty. Using the Done button will always post the current total to list.

**Proposal - Detail by Area**


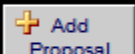


Mike & Judy Hammerstad

Whole House Music System  
1269.1-1.100

Pricing	Purchasing	Home
Payments	Work Orders	Tracker
Change Orders	Invoicing	Print Menu
Labor Meter	Labor Total	Grand Total

Qty    Make : Model    Description    Area Totals

26,001.49

Proposals													Sort			Print	?	Home
I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
<div></div> <div>User: Jim Engandela - Administrator Location: 1 - EME Audio &amp; Video Systems</div>													<div></div>		<div><div>Leave</div><div>Projects</div><div>Archive</div></div>			
<u>Company</u>	<u>Proposal Title</u>										<u>Created</u>	<u>Total</u>	<u>Fav</u>					
	Home Entertainment										4/9/2009	\$12,013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	Home Entertainment										2/17/2009	\$291,691	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

## Enhancement – Proposal Detail: Direct Access to Client, Details, Project, Related Contacts, Communications Log screens.

These 4 buttons now enable you to go directly to these screens.

Discipline		Area	Phase	Proposal - Detail by Area				Q View	Utility	?	Home
Client		Areas	Fees	Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100				Pricing	Purchasing	Leave	
Project	Details	Products	Area Text					Payments	Work Orders	Tracker	
Contact	Log	Supplements	Overviews					Change Orders	Invoicing	Print Menu	
Zone - Area			Client Mode		Labor Meter	Labor Total	Grand Total				
Discipline : Category			Type	Qty	Make : Model	Q Description	Area Totals				
Home Entertainment System											
Zone 1 - Home Theater											12,173.23
Video : Display : DLP Video Projector				1 ea	Runco : CL-610	DLP ProjectorDLP Projector		7,995.00			

## Enhancement – Proposal & Project: Client, Project, Details screens

The 5 Navigation tabs have been re-arranged for easier usage. All of the primary fields needed when creating a new Proposal are now on the Client and Project screens, including the Proposal Title.

Reset Project to Prefs
Proposal - Project Info
Print
?

Client
Project

Details
Contacts
Com Log

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

Done

Proposal-Project Title

Home Entertainment System

Installation & Payment Type

New-3 Phase Pre-Trim-Final

Hourly Labor Rates
Blank = Default

Default
1
2
3

Hourly Rate 1
Hourly Rate 2
Hourly Rate 3

Basic Rate
Inner City Rate
Prewire only

Labor Degree of Difficulty

Building Type
Frame

Number of Floors
1

Project Difficulty
%

1 - Prewire
2 - Trim
3 - Final

Wire and Cable Supplements

Building Size
5000 square feet

Bulk Home Run - Avg Wire Length: 150 feet per Home Run

Bulk Room Run - Avg Wire Length: 75 feet per Room Run

Itemize each Wire & Cable entry:
Yes
No

Installation Phases
Update

Install Start Dates

1 - Prewire
2 - Trim
3 - Final

Target Project Completion Date

Install Notes

Client has all cherry cabinets and is concerned that all brackets and plates are aligned properly.

New-3 Phase Pre-Trim-Final

1 - Prewire
2 - Trim
3 - Final

Degree of Difficulty is changed by Building Type, Floors and Client Difficulty and is applied to Labor Time. Home Run Wire Length is changed by Building Size. Room Run Wire Length is fixed. Itemize Wire & Cable only affects newly added wire.

### Enhancement – Proposal/Details: Default Rate checkbox

When creating a new Proposal the Default Rate 1 checkbox is checked. You can switch to Rate 2, or Rate 3 if you wish.

Hourly Install Rates

Blank = Default

Default

☒ 1 ☐ 2 ☐ 3

Hourly Rate 1 Hourly Rate 2 Hourly Rate 3

Basic Rate Inner City Rate Prewire only

### Enhancement – Proposal/Areas/Add Pure Wire & Parts Supplements

The Wire description has now been added to the pop up list to make it easier to add the correct Wire Supplement to a Proposal Area. The Parts Supplement screen also shows the Parts Description.

Pure Wire in Atrium

Refresh

Add Wire Make Model

Add Wire Supplements

Qty Make Model

Linn

Add

Bulk: Bulk Analog interconnect Analog interconnect

Bulk: Bulk Silver Cable Silver analogue interconnect

Bulk: K10 Cable Loudspeaker cable

Bulk: K20 Cable Loudspeaker cable

Bulk: K400 Cable Bi-wire speaker cable

Bulk: K600 Cable Tri-wire speaker cable

Pre-Cut: Black Interconnect Pair of phono-phono leads (Black cable)

Pre-Cut: CAT5-40m Terminated CAT5 Knekt cable - 40m

Pre-Cut: CAT5-60m Terminated CAT5 Knekt cable - 60m

Pre-Cut: K10-10m Pair complete cable including terminations 10m

Pre-Cut: K10-2.5m Pair complete cable including terminations 2.5m

All Wire in Atrium

### Enhancement – Proposal/Q View – Q View Contact Email

When accessing your Contacts using the Q View (Quick View) button from within a Proposal or Project you can now Email directly from this screen, provided that an Email address has been assigned to a Contact.



**Contract**

Default ☒ Use Contract 1 Contract 1  
☐ Use Contract 2 Contract 2  
☐ Use Contract 3

**5 Subtotals**

5 Subtotals = All 5 Subtotals separate  
3 Subtotals = 1 (Products), 2 (Parts + Wire), 3 (Labor + Fees)  
2 Subtotals = 1 (Products + Parts + Wire), 2 (Labor + Fees)  
1 Subtotal = Combines All and Shows only 1 Subtotal

**Price Guarantee**

Do not show Contract Price Section ☐  
Do Not Show Date ☐

**Other**

Warranty Type ☒ Factory ☐ Extended  
Show Discount ☒ Yes ☐ No

**Sales Tax**

Show Sales Tax ☒ Yes ☐ No  
Show Contract Tax Totals

### Enhancement – Fees/Expenses: Auto Trip Mileage Calculator

You can now automatically set the round trip mileage on all of the Trip Calc expenses at one time.

Report Header: Travel & Expenses **Completed - Travel & Expenses Fees** Print ? Home

Mike & Jessica Potter Done

Commercial Security System Current Install Type: New-3 Phase Pre-Trim-Final Trip Calc Mileage

1287.1-1.100

**Travel & Expense Fees**

Pick Qty	Travel & Expense Fee SKU	Phase Description	Trip Calc or Flat Fee	Single Round Trip Time	Total Time (min)	Hourly Rate	Cost % of Sell	Flat Fee Sell Amount	Tax Status A	Tax Status B	Fee Total
	Per Diem-One installer	1	Flat Fee				50%	\$30.00	E	E	
	When overnight stays are required, we charges a flat rate of \$30.00 per diem										
3	Phase 1 Travel	1	Trip Calc	60	180	\$30	50%		E	E	\$90.00
	Travel charges per installer per trip is charged to the client to account for labor										
3	Phase 2 Travel	2	Trip Calc	60							
	Travel charges per installer per trip										
2	Phase 3 Travel	3	Trip Calc	60							
	Travel charges per installer per trip										

**Trip Mileage**

Enter round trip mileage (numeric only).  
This mileage will be applied to All Trip Calc Fees.

60

### Enhancement – Change Order: Title

You can now Change the Title of your Change Orders from the Change Order-Project screen or the Change Order Print Menu (see pix below) This Title will show on all Change Order printed documents. The Original Proposal/Project Title shows in white on the right.

**Pending Change Order - Project Info** [Print] [?]

John & Mary Smith

Client: [Details] Project: [Contacts] Com Log

**Video Distribution System**  
1284.1c1-1.100

Original Proposal/Project Title  
Central Vacuum System

**Change Order Title**  
Video Distribution System

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

**Hourly Labor Rates**  
Blank = Default

**Installation Phases**

Install Start Dates
1 - Prewire
2 - Trim
3 - Final

Target Project Completion Date.....

**Pending Change Order - Print Menu Options** [Print CO] [?]

John & Mary Smith

**Video Distribution System**  
1284.1c1-1.100

[Change Order] [Overviews] [Fees & Services] [Print Reports]

**Change Order**

**Change Order Title**  
This CO Title will override the default Title and will not affect the Original Project Title.

Video Distribution System

**Original Proposal/Project Title**  
Central Vacuum System

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

4/11/2009 [Report Date - Lock]

### Enhancement – Product Library: All Screen Headers: Fine Tuned

All Screen headers have been fine tuned to provide more consistency between them and commonly used buttons have been arranged in more logical positions.

**Product Library - List View** [Utility] [?]

[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] [Part] [Phantom] [Bulk] [PreCut] [Utility Lists] [Detail List] [Inventory Control] [Show Hidden]

**EME audio & video**  
451 of 451 Items

[New Product] [Leave] [Product Sets] [Print Menu]

Displin	Cat	Type	Class View	Make	Model : SKU	Description	Finish	Notes	Sell Price	Tag All
Audio	Multi	Switcher	Crestron	AADS	Adagio Audio	Black	2,500.00 ea			
Audio	Multi	Switcher	Crestron	AADS-XM	Adagio Audio	Black	2,900.00 ea			



**Product Library - Pick Products**

Find Products Fav A B C

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 Part Phantom Bulk PreCut

Proposal Products Clear Picked Hidden Products Show Picked

**Add Products to Atrium**

451 of 451 Items

New Product Phn Lab Part Wire Pick Cancel

Disp	Cat	Type	Class	Pick Qty	Make	Model : SKU	Description	Finish	Sell Price	(Installed)	Fav
Audio	Multi	Switcher		ea	Crestron	AADS	Adagio Audio	Black	2,500.00		
Audio	Multi	Switcher		ea	Crestron	AADS-XM	Adagio Audio	Black	2,900.00		

**Product Library - Detail List**

Find Products Fav A B C

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 Part Phantom Bulk PreCut

451 of 451 Items Done

Detail List Price List Value List No Values Pix Path

Phn Lab Part Wire

All Product Groups

Dept	Cat	Type	View	Make	Model	Description	Finish	Notes	Sell Price	Tag All	Fav Hide
Audio	Multi	Switcher		Crestron	AADS	Adagio Audio Distribution System	Black		2,500.00 ea		
									2,560.00		
									50.0%		
									\$60.00		

Prewire Trim Final Total Labor Labor Parts Wire

0:00:00 0:00:00 1:00:00 = 1:00:00 h:m:s \$60.00 = \$60.00 \$60.00

**Product Library - Assign Product Groups to Products**

Find Products Fav A B C

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 Tag All Products in List UnTag All Products Find Tagged Products

1. Find desired products  
2. Tag or UnTag desired products  
3. Click "Assign Group to Products" button

451 of 451 Items

Assign Group to Products

Disp	Cat	Type	Class	Tag	Make	Model : SKU	Description	Sell	Fav
Audio	Multi	Switcher		<input type="checkbox"/>	Crestron	AADS	Adagio Audio Distribution	2,500.00 ea	
Audio	Multi	Switcher		<input type="checkbox"/>	Crestron	AADS-XM	Adagio Audio Distribution	2,900.00 ea	

## Enhancement – Contact/Contact Detail/Proposal Defaults

The 2 Alternate Billing Contact selection portals have been consolidated into one portal with a checkbox that enables you to Sort by Contact name or by Company.

Clear Default Alternate Billing Contact

**Cecilia Christenson - Wade Realty**

Set Default Contact Company Sort ☒

	Screnok, Tom	Buffalo River Clinic
		EME Audio & Video Systems
	Zimmerman, Jerry	Heavy Duty Components
		Horizon
	Engandela, Jim	Horizon Software
	Snodgrassx, Patrica	Linn Products
	Christenson, Lee & Kris	North American Fly LTD
	Struthers, Scott	Sonance
	Yamamoto, Yoshi	Sony Inc
	Burkes, Tom & Kelly & Family	Sunbelt Business Brokers
	Christenson, Cecilia	Wade Realty
	Callahan, Hayes	
	Defiglia, Rudy & Cecila	
	Dowling, Dave	
	Efron, Ron	

### Enhancement – Contact/Contact Lists: Use Fast Find Category button

Users can now assign a specific Contact Category to a Fast Find button for quick access to all Contacts that have that Category.

1<sup>st</sup> assign at least one Contact the Category of your choice. Then go into the Master Preferences/Other/Misc 1 screen and select that Category. This assigns the Category to the button. Clicking on the Fast Find button will Find all the Contacts for that Category.

**Contact User Fast Find Category**

User Cat

1st create a contact and assign it a unique Category value.  
Then select that value from the pop up list.  
This Category Value will appear on the Contact Fast Find button

Find Contacts Fav A B C Contact Library - List View 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

Clients Users New Contact 30 of 30 Contacts More Views Leave

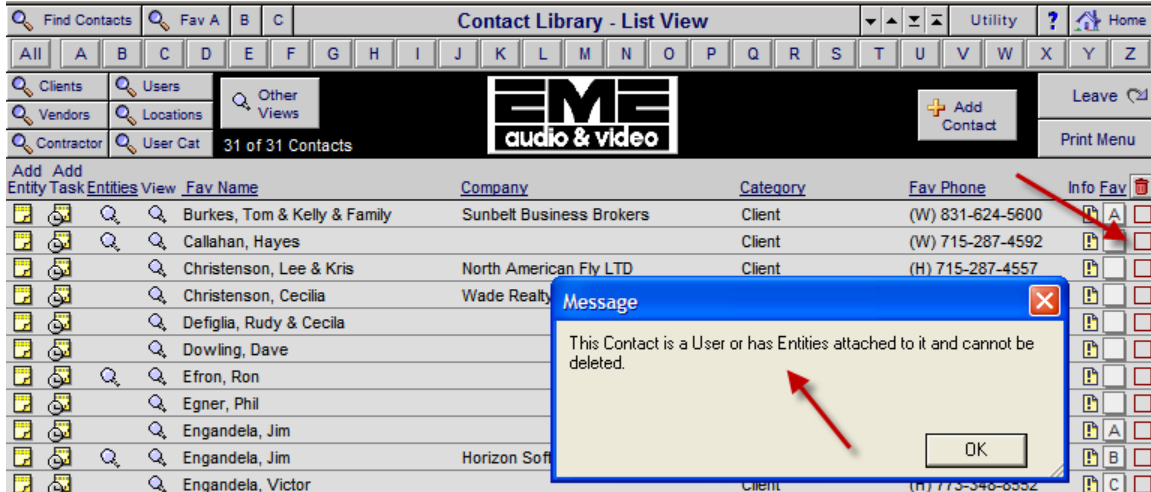
Vendors Locations Contractor User Cat

New Prop New POS Task Entities View Fav Name Current User: Jim Engandela Company Category Fav Phone Info Fav

			Burkes, Tom & Kelly & Family	Sunbelt Business Brokers	Client	(W) 831-624-5600		A	
			Callahan, Hayes		Client	(W) 715-287-4592			

### Enhancement – Contact Library/Do not Delete Active Contacts

If you try to delete a Contact that is a User or has Entities attached to it such as a Proposal, Project, or POS invoice then you will not be allowed to delete that contact.



### Enhancement – Contact Library/Contact Detail/Entities

Tracker Task and Appointment Entities have been added to the Entities screen. You can now directly access Tasks and Appointments for a Contact by clicking on the View button on the portal.

Tracker Task/Appointment			
View	Due Date	Tracker Kind	Owner
	4/7/09	Client Task	Jim Engandela
	10/13/05	Appointment	Jim Engandela

### Enhancement – Contact Library/Contact Info

The Contact Info screen has been redesigned to provide better clarity and usability.

More Info **Contacts - Info** ? Home

Creation Date: **Tom & Kelly & Family Burkes**  
 Modified Date: 4/4/09 **Sunbelt Business Brokers** Done

Contact Info Com Log Entities Transactions Prop Prefs Prev Next 1 of 29

Date Stamp Contact Notes Print Notes

Internet=results@sirius.com Applelink=result.usa eWorld=results  
 FEDEX #1676-5079-1  
 mike@adguyinc.com

Attachments  
 Enter Computer File Paths to reference documents  
 View Label File Path

Picture 1 Picture 2 Picture 3 Picture 4 Picture 5

Misc Info		Misc Info		Misc Info	
Charge Card					
Referred By	Molly in 18-24Months				
Proposal					
Project					

### Enhancement – POS/Purchase Order: Ship To Address

You can now change the Ship to Address on a POS Purchase Order. If the Ship to Label is set to "Shop Warehouse" it will show the Shop Warehouse address from your Master Preferences. If the flag is set to Client Address, you can click on the Set Up button and enter any address you choose into the second contact fields.

Print Setup Delete PO Duplicate PO **POS - Purchase Order** OPEN ? Home

Print Store Copy Preview **PO #7193** Set Up Done 1 of 5 Prev Next

Ship To: Shop Warehouse:

BTX  
 5 Skyline Drive  
 Hawthorne, NY 10532  
 United States

EME Audio & Video Systems  
 100 Purchasing Lane  
 Purchasing City, WI 567937  
 Ph: 715-287-3335 Ext:  
 Fax: 715-287-4464  
 email: horizon@trivest.net

9/29/2005

POS - Purchase Order OPEN

PO #7193

1 of 5

Ship To: Client Address:

Mr. Jones  
5 Skyline Drive  
Hawthorne, NY 10532  
United States

9/29/2005

Set Up

Done

Prev Next

Second Contact

Salutation

Mr. Fred Jones

COMPANY

ADDRESS 5 Skyline Drive

CITY Hawthorne

ST, ZIP, COUNTRY NY 10532 United States

Copy 1>2

### Enhancement – Text Library: Quick find by Category

You can now quickly find all text by Category by clicking on an underlined Category.

Find Text Fav A B C

Text Library - List View

All A B C D E F G H I J K L M N O P Q R

New Text

EME audio & video

View	Category	Title	Text
🔍	<u>Audio</u>	CD-100 disc changer	A CD changer will enable you pla
🔍	<u>Audio</u>	Speaker - bookshelf	Hi-fidelity bookshelf loudspeakers
🔍	<u>Audio</u>	Speaker - ceiling	A pair of ceiling speakers will pro

### Fix – Product Library/Utility: Ezip Import Utility

This import utility now properly imports the Product description from the Ezip templates.

### Fix – Proposal/Labor Supplements: Delete All Labor

This utility now correctly deletes All Labor Supplements.

**Proposal - Labor Supplements**

Alt Area View  Print ? Home

Areas: Products Text  
Labor Parts Wire Tasks

Jim Engandela  
Horizon Software  
Home Entertainment System  
1267.1-1.100

1 - Prewire DOD 0%  
2 - Trim DOD 0%  
3 - Final DOD 0%

Done

Labor by Phase

All Areas Labor Supplements Labor Total 64:07:30 \$4,013.33

Labor assigned to Zone - Area Qty Make : Model Sort by Type Tax A B Install Phases Hourly Rate Total Time with DOD (h:m:s) Ext Sell

1 - Home Theater	1	Linn : 5101 Personal Handset	Programming	T	T	3	\$80.00	0:30:00	\$40.00	<input type="checkbox"/>
1 - Home Theater	1	Linn : 5101 Personal Handset	Calibration	T	T	3	\$100.00	0:20:00	\$33.33	<input type="checkbox"/>

### Fix – Contact Library/Print Menu/Contact Detail Reports: First Name

The 8<sup>th</sup> Contact First Name field was showing the Last Name instead of the First Name and this has been corrected.

### Fix – Proposal/Supplements: Delete All

The Delete All button has been updated on the Labor, Parts, Wire and Task screens to fully delete all Supplements relating to a Proposal.

**Proposal - Labor Supplements**

Alt Area View  Print ? Home

Areas: Products Text  
Labor Parts Wire Tasks

Jim Engandela  
Horizon Software  
Home Entertainment System  
1267.1-1.100

1 - Prewire DOD 0%  
2 - Trim DOD 0%  
3 - Final DOD 0%

Done

Labor by Phase

All Areas Labor Supplements Labor Total 64:07:30 \$4,013.33

Labor assigned to Zone - Area Qty Make : Model Sort by Type Tax A B Install Phases Hourly Rate Total Time with DOD (h:m:s) Ext Sell

1 - Home Theater	1	Linn : 5101 Personal Handset	Programming	T	T	3	\$80.00	0:30:00	\$40.00	<input type="checkbox"/>
1 - Home Theater	1	Linn : 5101 Personal Handset	Calibration	T	T	3	\$100.00	0:20:00	\$33.33	<input type="checkbox"/>

### Fix – RCMS Product Import

Reset All import maps to include the Description Hold field and remove this section of the routine because it is redundant.

**"sub.groomText - Dealer Specific"**

```

If ["0"]
#Groom Descriptions..Omit these dealers because they don't want their descripts updated
If ["zxc.importKind.g <> "Flanners" and zxc.importKind.g <> "Chelsea" and zxc.importKind.g <> "Definitive" and zxc.importKind.g <> "..."]
Set Field ["pd.description", "Trim(Upper(Left(pd.description, 1)) & Lower(Right(pd.description, Length(pd.description) - 1)))"]
Set Field ["pd.description", "Trim(Proper(Case(IsEmpty(pd.description), prodUpdt~mProd.cc::pd.description, pd.description)))"]
End If
  
```

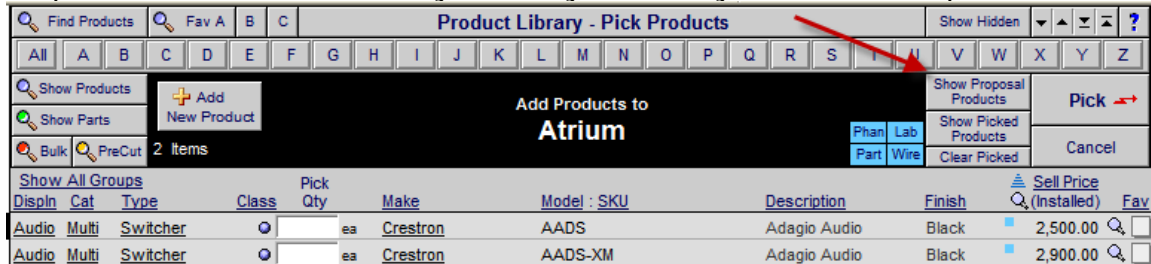
### Fix – Proposal/Labor Supplements: Edit button Navigation

Using the Edit button to change your labor times now navigates to the proper screen and returns to this screen when you are done.



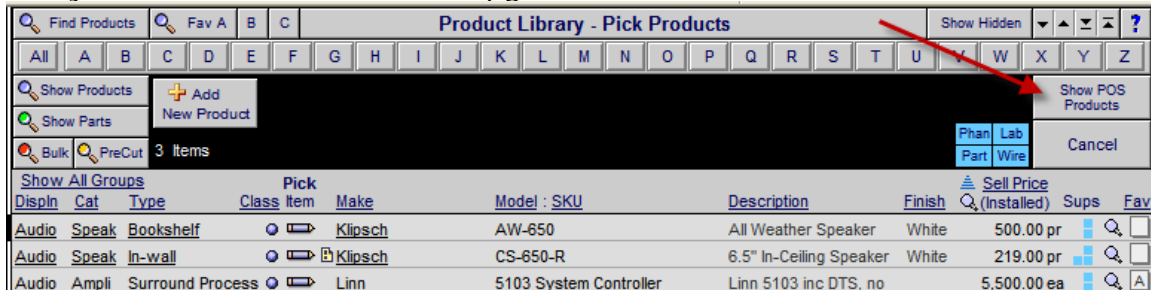
### Enhancement – Proposal/Pick Products: Show Proposal Products

When picking products in a Proposal, you can now click on the Show Proposal Products button, to show all of the Products in your Proposal. This enables you to quickly find a short list of products that you have already picked into your Proposal. This feature works dynamically on all of your current Proposals.



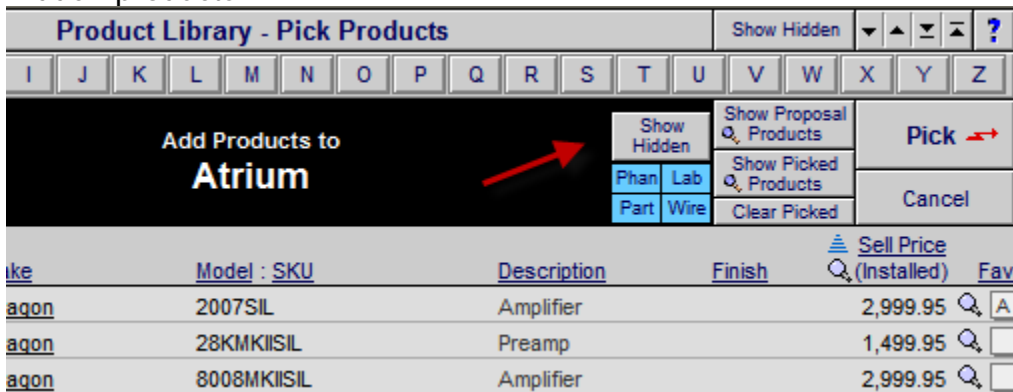
### Enhancement – POS/Pick Products: Show POS Products

When picking products in a POS invoice, you can now click on the Show POS Products button, to show all of the Products in your POS invoice. This enables you to quickly find a short list of products that you have already picked into your POS Invoice. This feature only works with new products that have been picked into your POS invoices after this upgrade.



### Enhancement – Proposal/Pick Products: Show Show Hidden Products

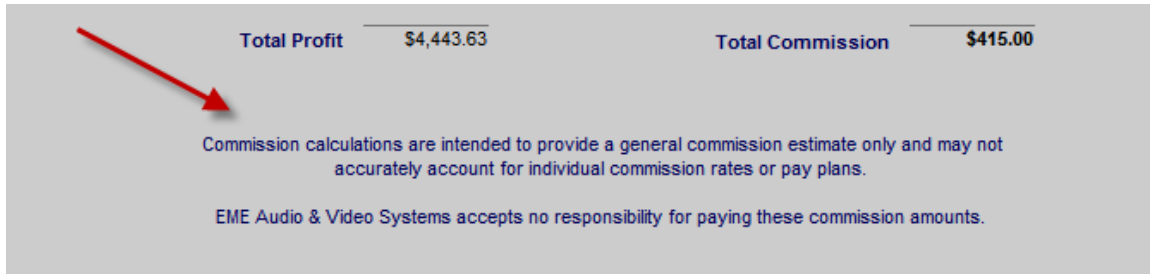
When picking products in a Proposal, the Product Library initially now does not show Hidden products. You can click on the Show Hidden button to see the Hidden products.



### Enhancement – Proposal & Project/Pricing: Commission screen-report



A disclaimer has been added to the Salesman's Commission screen and report. The Commission report has been modified to recalculate the Proposal/Project totals to insure that the commission amount is accurate.



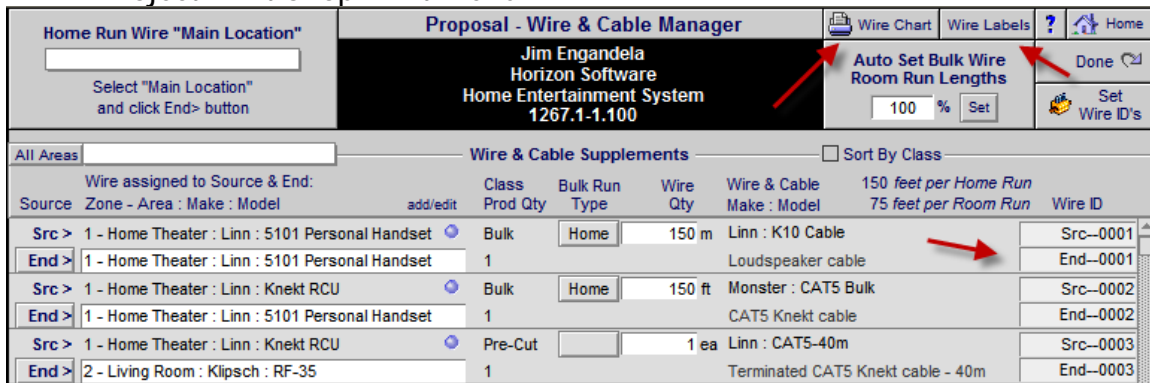
**Total Profit** \$4,443.63 **Total Commission** \$415.00

Commission calculations are intended to provide a general commission estimate only and may not accurately account for individual commission rates or pay plans.

EME Audio & Video Systems accepts no responsibility for paying these commission amounts.

### Enhancement – Proposal & Project/Wire Manager: Wire ID's

1. You can now edit the Source and End Wire Label ID's as well as Auto Enter the Label ID's.
2. Printing Wire Labels now gives you an option to Auto Set the Wire ID's.
3. Fix: Printing Wire Labels and the Wire Chart now does not show the "No Records Found" message if there are Wires present.
4. You can now access the Wire Manager directly from the Proposal & Project Print Shop Print menu.



**Home Run Wire "Main Location"**  
Select "Main Location" and click End> button

**Proposal - Wire & Cable Manager**  
Jim Engandela  
Horizon Software  
Home Entertainment System  
1267.1-1.100

Wire Chart Wire Labels ? Home

Auto Set Bulk Wire Room Run Lengths  
100 % Set Done

Set Wire ID's

All Areas Wire & Cable Supplements Sort By Class

Source	Zone - Area : Make : Model	add/edit	Class Prod Qty	Bulk Run Type	Wire Qty	Wire & Cable Make : Model	150 feet per Home Run 75 feet per Room Run	Wire ID
Src >	1 - Home Theater : Linn : 5101 Personal Handset		Bulk	Home	150 m	Linn : K10 Cable		Src--0001
End >	1 - Home Theater : Linn : 5101 Personal Handset		1			Loudspeaker cable		End--0001
Src >	1 - Home Theater : Linn : Knekt RCU		Bulk	Home	150 ft	Monster : CAT5 Bulk		Src--0002
End >	1 - Home Theater : Linn : 5101 Personal Handset		1			CAT5 Knekt cable		End--0002
Src >	1 - Home Theater : Linn : Knekt RCU		Pre-Cut		1 ea	Linn : CAT5-40m		Src--0003
End >	2 - Living Room : Klipsch : RF-35		1			Terminated CAT5 Knekt cable - 40m		End--0003

### Enhancement – Proposal/Product Detail – Wire: Restore Prices

This new utility will restore all of the Wire Cost and Sell Prices to their original prices in the Product Library.



Restore Wire Prices Proposal - Product Detail - Wire Supplements 3 of 3 ? Home

Areas Products Text Done

Labor Parts Wire Tasks Prev Next

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

Make Model Wire & Cable

Linn Add Only products classified as "Wire" can be added  
Wire & Cable are Itemized

Class	Bulk Run Type	No Labor	Qty	Wire Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell
Bulk	Home		150 M	Linn	K10 Cable	Loudspeaker cable	1	3.00	5.00	750.00
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00

## Enhancement – Project/Payment Invoices: Labels

When creating a project payment invoice the description field on the invoice is now populated with the actual Payment Step label instead of a generic payment step label.

Original Project - Payment Terms						Print	?
Mike & Jessica Potter						Done	
Installation Type New-3 Phase Pre-Trim-Final						View All	Change Orders
Payment Terms							
Payment Method Percentage	Deposit Deposit	Step 1 Payment Payment 1	Step 2 Payment Payment 2	Step 3 Payment Payment 3	Holdback Hold Back		
Payment Description	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.		
Original Project						Totals	
Project Pymt Amts	\$3,064.67	\$9,194.00	\$6,129.34	\$9,194.00	\$3,064.67	\$30,646.68	
Pymt Date Due	9/12/2006	10/2/2006	11/1/2006	12/1/2006	3/21/2007		
Add Payment Invoice	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Total Pymt Amt	
Date Invoiced					2/23/2009		

Setup		Sales Invoice Detail Not Posted				Prev/Next		?	
Delete SI		Project Contact			Bill To Contact			<input type="checkbox"/> Use Alt Billing Contact  Post SI	
SI Number 3013 - 1285.1-1.100 SI Date 2/23/2009		Mike & Jessica Potter 567 58TH Street Oakland, CA 94607			Mike & Jessica Potter 567 58TH Street Oakland, CA 94607			Done	
Posted Date								Preview SI	
Export Date								Print & Post SI	
Special Notes <input type="text"/>							Invoice Total		\$3,064.67
Make	Model	Description	Kind	Serial Numbers	Qty	Unit Sell	Extended Sell		
Payment		Hold Back		<input type="text"/>	1	3,064.67	3,064.67		

## Enhancement – Project/Print Menu/Shop: Specifications Report

A Specification disclaimer has been added to this report.

2/25/2009	EME Audio & Video Systems - Confidential Report	Page 1
Product Specifications		
Ron Efron		
Home Entertainment System		
1290.1-1.100		
All specifications are subject to error or change and dimensions should be physically verified.		

### AUDIO

1 ea Crestron - AADS - Adagio Audio Distribution System  
 Finish Black  
 Dimensions H 5.64" x W 17.16" x D 18.08"

### Enhancement – Master Preferences/Other: Add buttons & screens

New stacked buttons in the Prefs/Other module provide more space and clarity for Other Preference screens.

Master Prefs - Other - Proposals 1

Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters	
Proposal 2	Projects 2	Products 2	Misc 2	3rd Party 2	Graphics	

Proposal/Project/Completed/Archive Lists

No Proposal New/View Option ☐

Sort Proposals & Projects ☒

Proposal & Project Sort Order

### Enhancement – Master Preferences/POS: Sort POS Invoices

A new preference has been added to the Master Preferences/POS screen to Not Sort the POS Invoices List screens when you go into them. If you choose to Sort these screens you can now also specify Ascending or Descending sort orders.

Master Prefs - POS Defaults

POS Alternate

Options

Do Not Sort POS Lists screens ☐

POS List screens Sort Order

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

### Enhancement – Project Manager: Project Owners pop up

All Project Management screens now have a Project Owners button that displays the Project Salesman, Project Manager and Project Engineer.

Find Projects

Project Manager - Percent of Completion

All A B C D E F G H I J K L M N O P Q R S T U V

Administrator

Manager

User

EME audio & video

%Comp JobCost Install Py

Total Master Project A

Total Averag

Balance

Sold Date	Project	% of Completion	% Remaining	Project Owners	Original Project	Finalized CO's	Master Project w/CO's
Client: 1285.1-1.100	Project: Potter, Mike & Jessica	9/12/2006			\$30,646.68		\$30,646.68
View	Labor	0.0%	100.0%	Products			
	Invoices	0.0%	100.0%	Parts			
	Payments	0.0%	100.0%	Wire			
Client: 1284.1-1.100	Project: Smith, John & Mary	9/12/2006					

Project Owners

Salesman: Jim Engandela

Project Manager: Joel Roberts

Project Engineer: Jon Oster

OK

## Enhancement – Project/Work Orders: Auto Set & Classifications

The Auto Set utility now Clears all Qty as well as Setting the Qty. The Class of each item is now displayed on this screen and on the printed Work Order. This new Class display will only show on newly picked items after this upgrade.

**Work Order Detail Not Posted** [Prev/Next] [?]

Setup [Delete WO] [Show Area Text] [No Time on WO] [Post WO]

[Create Continuation WO] [Preview WO] [Done]

[Auto Set All Installed Qty] [Print Install Tasks] [Print & Post WO]

Qty Left to Install: 771 Installed by: [ ] Install Time: [ ] Total Time: 0:00:00 hrs:min

**Message**  
Do you want to Set or Clear all of the Installed Quantities to the To be Installed Qty on this WO?  
[Cancel] [Clear] [Set]

Qty To Install	Zone Area Phase Location/Notes	Sort	Make	Model Serial Numbers	Class Description	Install Log	Qty Installed	Installed By	Labor Date	Qty Left
1 ea	Zone 1 - Home Theater 3	1	Linn	5101 Personal Handset	Product Universal	[ ]	0:50:00			1
1 ea	Zone 1 - Home Theater 3	1	Linn	5125	Product Five channel	[ ]	1:00:00			1
5 pr	Zone 1 - Home Theater 3	1	Linn	Black Interconnect	Pre-Cut Pair of	[ ]	0:25:00			5
75 ft	Zone 1 - Home Theater 1	1	Linn	Bulk Analog interconnect	Bulk Analog	[ ]	0:37:30			75

Area Labor:		14:35:00		Zone 1 - Home Theater	
ID	PZ	Install Date	Labor Time	Qty	Make - Model
1	3		0:50:00	1 ea	Linn : 5101 Personal Handset Product : Universal learning remote
1	3		1:00:00	1 ea	Linn : 5125 Product : Five channel power amplifier (Black)
1	3		0:25:00	5 pr	Linn : Black Interconnect Pre-Cut : Pair of phono-phono leads (Black cable)
1	1		0:37:30	75 ft	Linn : Bulk Analog interconnect Bulk : Analog interconnect

## Enhancement – Letters: Hide Proposal Log Records

Proposal and Contact Communication Log records are stored in the Letters Library and could be viewed and deleted accidentally. They are now hidden so that there is no risk of deleting or changing them.

### Enhancement – Contacts/Contact Detail/Vendors: Vendor Terms

You can now assign Vendor Payment Terms on the Contact/Vendors screen. When you create a Purchase Order in a Project these default terms will automatically be on the PO and you can change them on that PO as well.

**Contacts - Assign Vendor** 2 of 5 < Prev/Next > ? Home

Check the Makes that can be purchased from this Vendor

**Linn Products**

Vendor # [ ]

Vendor Payment Terms Standard Company Terms

☐ Sony  
☐ Speakercraft  
☐ Sunpak  
☐ Teac  
☐ Techcraft  
☐ Terk  
☐ Universal Remote  
☐ Vantage Point  
☐ Video Link  
☐ West 7th Street

10% 10 days Net 30 days  
5% 30 Days Net 60 Days  
C.O.D.  
C.O.D. Certified Check  
C.O.D. Company Check  
Net 20 Days  
Net 30 Days  
Net 60 Days  
Net 90 Days  
Standard Company Terms

### Enhancement – POS: All List Screens: Direct Access to List screens

You can now access all POS List screens directly from any screen without going to the POS Invoice Dock. Each screen now also shows the number of records in the list.

**POS - Quotation List** Find Quote 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

Quotation Archive Sold Quotes 19 Quotations Click on Quotation to view QT SI CO SO WO PO RA Done

View	Invoice	Client	Company	Date	Proposal	Amount Sold	Archive
Q	QT #6035	Di Cianna, Kim		1/13/2005		\$2,179.60	<input type="checkbox"/>
Q	QT #6048	Swadron, Wayne	Wayne Swadron Architect	1/3/2005		\$4,393.00	<input type="checkbox"/>

### Enhancement – POS: All List Screens: Show Done/Sold Invoices

All POS List screens now exclude all "Done/Sold" Invoices. The Alpha Finder also excludes these "Done/Sold" Invoices.

A new "Show" button has been added that finds and displays all of the "Done/Sold" and Closed Invoices in for all POS modules.

**POS - Quotation List** Find Quote 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

Quotation Archive Sold Quotes 19 Quotations Click on Quotation to view QT SI CO SO WO PO RA Done

View	Invoice	Client	Company	Date	Proposal	Amount Sold	Archive
Q	QT #6035	Di Cianna, Kim		1/13/2005		\$2,179.60	<input type="checkbox"/>
Q	QT #6048	Swadron, Wayne	Wayne Swadron Architect	1/3/2005		\$4,393.00	<input type="checkbox"/>

## Enhancement – POS: All List Screens: New Reports

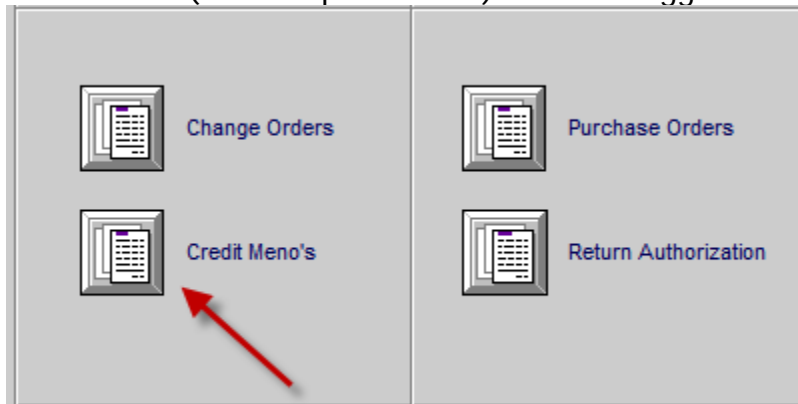
All Printed reports now show all of the screen information, such as Amount Due etc. All Invoices that are shown on the screen will appear on the printed report.

 Find Quote	POS - Quotation List																	 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						
 Quotation Archive	 Sold Quotes	19 Quotations																	Click on Quotation to view						QT	SI	CO	SO	VO	PO	RA	Done 
<div>Archive</div>																																
View	<u>Invoice</u>	<u>Client</u>	<u>Company</u>														<u>Date</u>	<u>Proposal</u>	<u>Amount</u>	<u>Sold</u>												
	QT #6035	Di Cianna, Kim															1/13/2005		\$2,179.60	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>										
	QT #6048	Swadron, Wayne	Wayne Swadron Architect														1/3/2005		\$4,393.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>										

2/23/2009	POS WORK ORDER LIST					1
Invoice	Client	Date				
	Company	Proposal	Amount	Amt Due	Done	
WS #2118	Waldman, Mark	12/16/1997				<input type="checkbox"/>
WS #2151	BARBER, ROBERT DEN BOSCH & FINCHLEY	2/19/1998				<input type="checkbox"/>
WS #2474	Blankenstein, Larry Castlebank Homes	4/20/1999	\$1,739.29	\$1,739.29		<input type="checkbox"/>
WS #2529	Sabri, Sam Alar-Vac	6/29/1999				<input type="checkbox"/>
WS #2594	Tomash, Sasha & Anna	8/13/1999	\$270.00	\$270.00		<input type="checkbox"/>
WS #2644	Zalev, Dean	10/25/1999	\$364.01	\$364.01		<input type="checkbox"/>

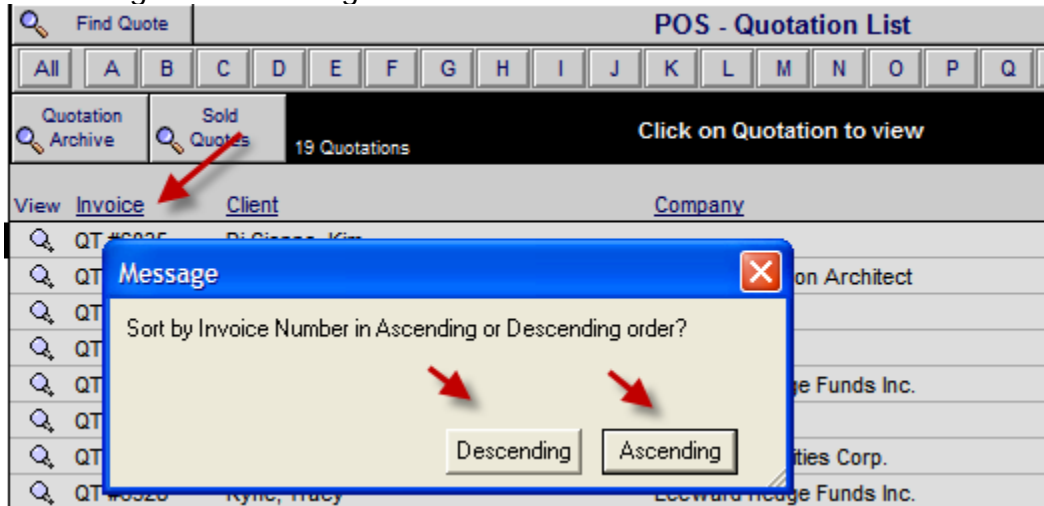
## Enhancement – POS: Existing Invoices screen: Credit Memo's

A new button to show existing credit memo's has been added to the Existing Invoices Dock. This takes you to the Sales Invoices List screen and sorts all of the Invoices (to the top of the list) that are flagged as credit memo.



### Enhancement – POS: All List screens: Invoice Number Sort Order

All List screens now have an option to sort the records by Invoice Number in Ascending or Descending Order.

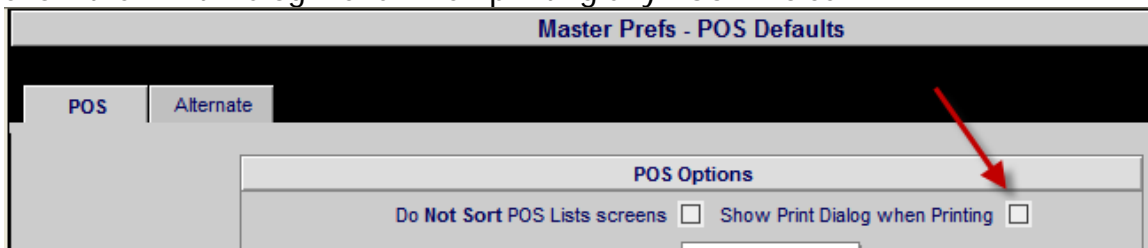


### Enhancement – POS: All Screens and Reports: Currency Neutral

All screens with currency numbers on them have been had the \$ sign removed to make them currency neutral for worldwide use.

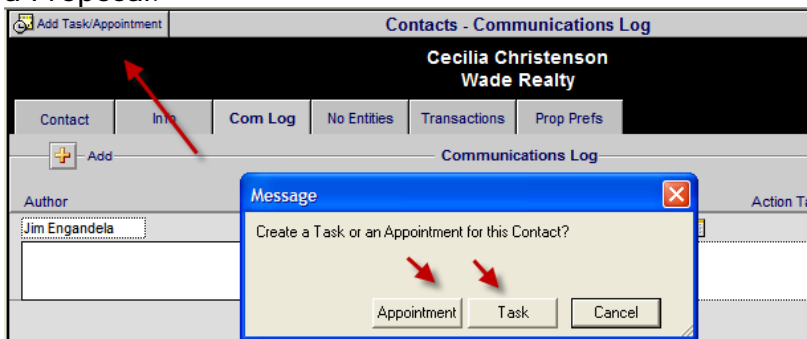
### Enhancement – POS/All Invoices: Show Print Dialog

You now can set a Preference in the Master Preferences/POS screen to always show the Print Dialog Menu when printing any POS Invoice.



### Enhancement – Contact Library/Com Log: Add Task or Appointment

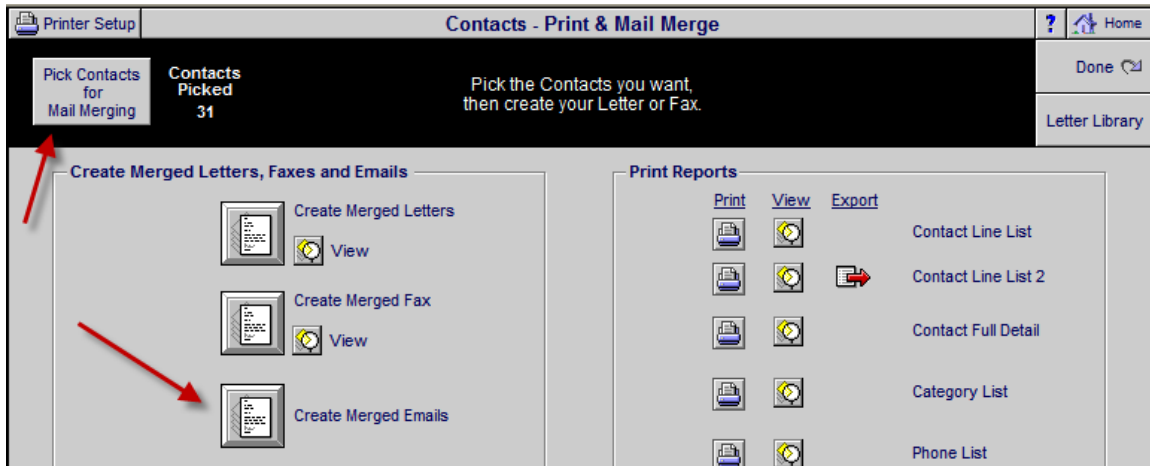
You can now add a Task or Appointment for this Contact directly from the Communication Log in the Contact module, just like you can from the Com Log in a Proposal.



### Enhancement – Contact Library/Print Menu: Email Merging

The Email Merging feature in the Contact Library has been refined and moved to the Contact Print Menu, enabling you to select the contacts you want to Merge.

1<sup>st</sup> Pick the Contacts you want to Email, then click on the Create Merged Email button.



At the Merged Contact Emails screen you can click on the Create Email with Address's button and an email, using your email client, will be created using these email address's. You can then add your email subject and message and send or delete the email.

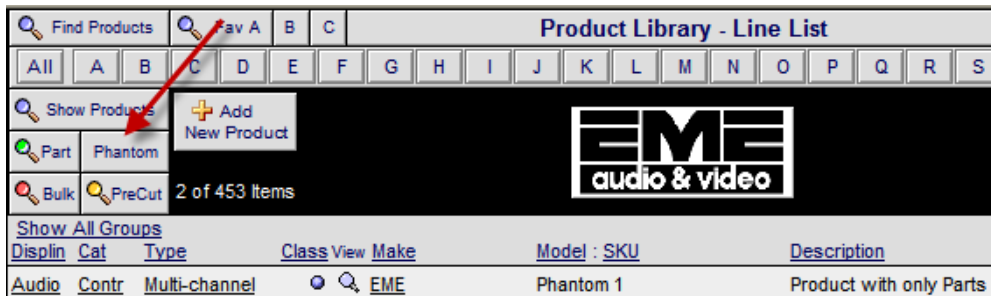
Or you can copy all of the email addresses to your clipboard and paste them into another program or Export all of the addresses to a file that you can open in Excel.



### Enhancement – Product Library/All List screens: New Phantom button

This button will quickly find all of the "Phantom" products in the Product Library.





### Enhancement – Product Library/Product Detail: Phantom Price Display

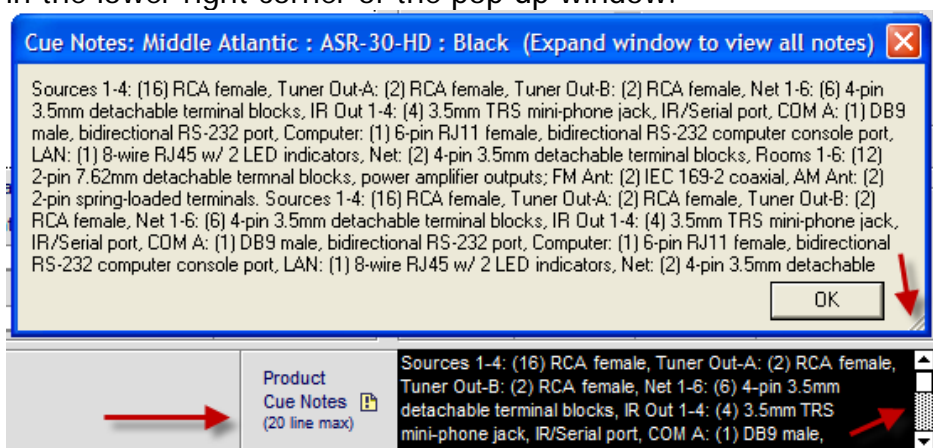
Phantom Products Prices are the sum of its Parts supplements and no longer include the wire prices. This enables the wire lengths and prices to be treated properly by the Proposal Wire Manager for wire supplements added to a proposal after this upgrade.

The Parts total (under Product) is now highlighted in blue to make it easier to see. The Parts total is blank because the amount is now shown on the Product and the Wire total is now displayed.

Loaded Price		Product & Supplements		Installed Price	
Parts Total		Product	Parts	Wire	GP 42.3%
Sell	\$95.00	\$95.00	\$12.50	\$1,470.00	Sell \$1,565.00
GP	40.0%	\$520.00	\$12.50	\$105.00	Labor \$637.50
Cost	\$57.00	\$615.00		\$1,575.00	Total \$2,202.50

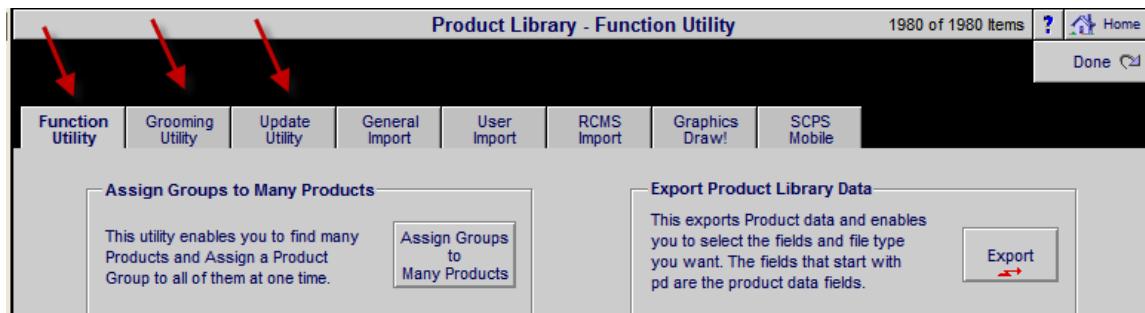
### Enhancement – Product Library: Expand Product Cue Notes

The Product Cue Notes field now has a scroll bar that enables you to enter up to 20 lines of text instead of 4 lines. When you pop up the Cue notes window you may need to expand it (to see all of your notes) by dragging on the expand tool in the lower right corner of the pop up window.



### Enhancement – Product Library Utility: New Screen Organization

The Product Utility screens have been renamed to "Function", "Grooming" & "Update" and similar utilities have been grouped together on each screen.



### Enhancement – Product Library: Utility/No Values screen

A new Utility screen enables you to Find and/or Sort Products that do not have a Group, Class, Sell Price, Labor, Parts, Wire, Tasks, Pix or PDF's. You can then click on the View icon on that Product and enter these values or click on the Print Menu button and print a report of these Products. Products that show a "1" indicates that they do not have a value.

Product Library - Empty Values List										2610 of 2610 Items		Done	
<div>Find Products</div> <div>Fav A B C</div> <div> <div>All</div> <div>A</div> <div>B</div> <div>C</div> <div>D</div> <div>E</div> <div>F</div> <div>G</div> <div>H</div> <div>I</div> <div>J</div> <div>K</div> <div>L</div> <div>M</div> <div>N</div> <div>O</div> <div>P</div> <div>Q</div> <div>R</div> <div>S</div> <div>T</div> <div>U</div> <div>V</div> <div>W</div> <div>X</div> <div>Y</div> <div>Z</div> </div>													
<div>Show Products</div> <div>Show Parts</div> <div> <div>Bulk</div> <div>PreCut</div> <div>Detail List</div> <div>Price List</div> <div>Value List</div> <div>No Values</div> <div>Pix Path</div> </div>													
<div>Find Products with no Values</div> <div>Products with a "1" contain no Values</div> <div>Print Menu</div>													
<div>Show All</div> <div>Find Find Find Find Find Find Find Find Find Find</div>													
<div>View</div> <div>Classification</div> <div>Make</div> <div>Model</div> <div>Group</div> <div>Class</div> <div>Sell</div> <div>Labor</div> <div>Parts</div> <div>Wire</div> <div>Tasks</div> <div>Pix</div> <div>PDF's</div>													
<div> <div>Q</div> <div>o</div> <div>ADEMCO</div> <div>1011BE12M</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> </div>													
<div> <div>Q</div> <div>o</div> <div>ADEMCO</div> <div>112</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> </div>													
<div> <div>Q</div> <div>o</div> <div>ADEMCO</div> <div>116</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> </div>													

### Enhancement – Product Library: Utility/General Import

This screen has been updated with better mapping and merging instructions and field definitions. A new Help Guide provides on-screen and printed documentation for Importing Product Data into SCPS.

Delete all Products in Library
Product Library - General Import Utility
1 of 1 Items
? Home
Done

Function Utility
Grooming Utility
Update Utility
General Import
User Import
RCMS Import
Graphics Draw!
SCPS Mobile

### Import Products from a Text or FileMaker File

Import Products with Field Mapping
Import

Import Field Mapping and Merging Help Guide

Mapping will add all products.  
1. Locate and open the File containing the data you want to import.  
2. At the "Import Mapping" screen;  
- Remove all Join Arrows by clicking & holding on the 1st arrow dragging down all fields.  
- Align "data in" fields on the left with SCPS data fields on the right,  
- Click on a SCPS field and drag it up or down into the right position.  
- Click on the arrow between the fields to insure data transfer.  
3. Select "Add new records" and click on the "Import" button at the bottom of the screen.  
4. Check **Perform Auto Enter** Option and click "OK" in the "Import Options" screen that appears.

Import Products with Data Merging
Import

Merging will update products with the same Make/Model number and add new products. You will be given the option to select your file and map your fields (see above instructions). You will then be given the option to update your Description field or leave it intact.

Import Parts with Data Merging
Import

The merging feature will automatically be deployed as the data is imported from the ProdUpdater file.

### Import Products from CPS and SCPS

Import CPS File with Data Merging
Import

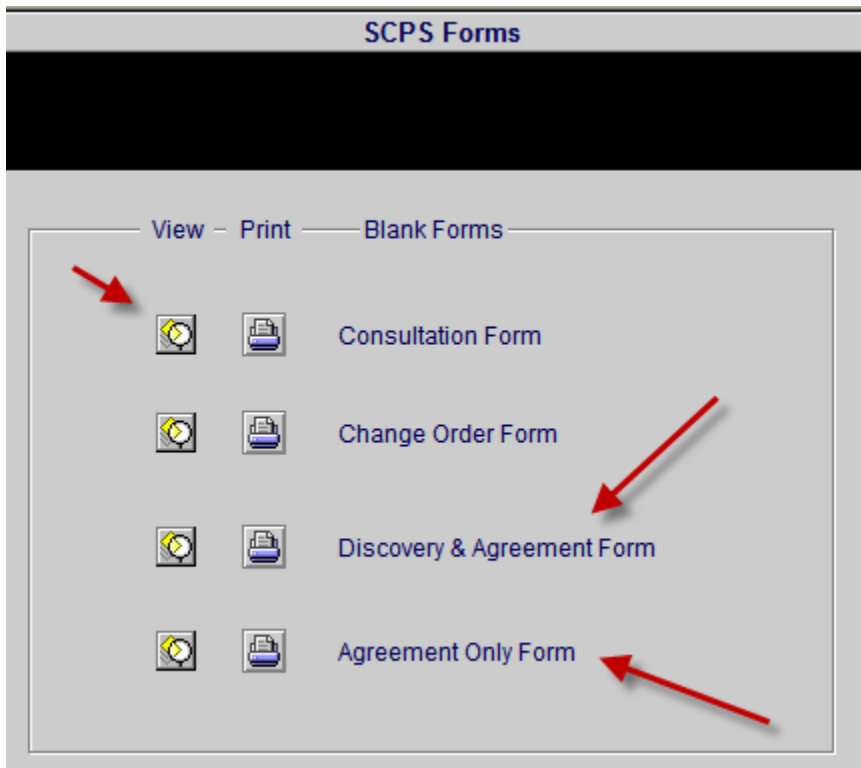
Select a CPS Product Library file, named cps.product.fp5

Import SCPS File with Data Merging
Import

Select an SCPS Product Library file, named product.fp5

## Enhancement – Main Logo Screen/Forms: Discovery Agreement Forms

2 new forms have been added to the Forms screen. A Discovery/Agreement and an Agreement from enable you to capture client information from prior to creating a proposal to ensure that the scope of work and the client's budget are accurately accessed. All forms can now be Previewed and Printed. The Discovery/Agreement form is 3 pages in length.



#### System Design Goals & Budget Guidelines

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Job Site Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Home Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
 Work Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
 Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
 E-Mail: \_\_\_\_\_

What type of project will this be: ☐ New Construction ☐ Remodeling ☐ Retrofit

What systems are your main areas of interest for this project:

☐ Home Theater/Surround System ☐ House Music System  
☐ Security/Automation System ☐ Telephone/Intercom System  
☐ Structured Wiring System ☐ Lighting Control System  
☐ Home Networking System ☐ Other Systems \_\_\_\_\_

### Enhancement – Master Prefs/Other/Product 1: Auto Set Flags

You can now set a Preference in the Master Prefs/Other/Products 1 screen that will Automatically Set Flags when adding a new product in the Product library. The Issue Staple Up Card is the first of these new preferences.

**Master Prefs - Other - Products 1**

<b>Products 1</b>	Products 2	Counters	Misc	3rd Party	Graphics
-------------------	------------	----------	------	-----------	----------

**Product Library**

Sort Products when entering the Product Library ☐ Yes ☒ No *(No Sort recommended)*

**Adding Product - Auto Set Product Flags**

 ☒ Issue Staple Up Card

### Enhancement – Product Library: Labor, Parts, Wire, Task Notes

A Note field has been added to each Supplement (Labor, Parts, Wire and Tasks) screen in the Product Library. This field can be used to store reference info for labor supplements.

**Labor Notes**

2 hours of programming has been added if an extra remote is specified.

### Enhancement – Product Library: Replace Data – Save a Copy

A utility that will save a copy of your product library to your desktop prior to Replacing Data in your Library has been added as a safety precaution.


Find Products
Replace Data
Product Library - Product Detail

Duplicate Product  
 Delete Product

**Product**  
  
Make  
Unique Model

**Message**
✕

Replacing data in your Product Library cannot be undone. As a precaution, you can save a copy of your Product Library to your Desktop. This copy can be used to restore you Product Data if necessary.





### Enhancement – Login: Perform Entity Unlock during login

SCPS now runs the Proposal/Project Entity Unlock routine during login to unlock all entities in case a user has crashed out of SCPS.

### Enhancement – Proposal/Print Menu/Push Lines: Add Sample & Print


Add a sample Contract Layout and the ability to Preview or Print the Contract directly from this screen.


Clear All  **Proposal Prefs - Print Options - Push Lines** Home

**Ron Efron** Done 


**Home Entertainment System**  
1290.1-1.100

**Contract**

1 Before the Warranty 

2 Before the Payment Terms 

Pushing will add blank lines before the designated sections.  
Enter **Only Carriage Returns**. Do not enter Text into these fields.  
Enter a Max of 10 Carriage Returns & do not Exceed the Borders.  
Use the Clear buttons or Backspace Key to remove returns.

 **Print or Preview Contract**

**GUARANTEE**

EQUIPMENT: Each component in a custom-installed system is warranted by its manufacturer. The terms and lengths of these coverage's may vary.

INSTALLATION: EME Audio & Video warrants residential installations against defects in materials and workmanship to two years from the date of the project's completion.

ITEMS NOT COVERED: This warranty does not cover failures due to abuse, lightning strike (we recommend surge protection products on all our installations; the surge protection manufacturer may offer some warranty against electrical surge damage) water damage or other similar natural occurrences. This warranty does not cover costs of removal and reinstallation of any defective components covered by a manufacturer's warranty. Routine maintenance is not covered.

**PAYMENT TERMS** Payment

### Enhancement – All Libraries: Add a record if all records are deleted

If you delete ALL of the Products, Sets, Text and Letters in their respective Libraries a new one will be automatically created. This makes it possible for these libraries to communicate with the Master Preferences module at all times.

### Enhancement – RCMS/Product Library: Import RCMS Products

The importing products routine has been re-written to provide greater reliability when matching the incoming RCMS products to the existing SCPS products, to ensure that duplicate products are not created. We are only able to text this routine with Flanners data, so please take note of any issues and inform Horizon.


### Enhancement – RCMS Pump Up: Auto Dag Supplements for Deletion



Clicking on the Tag Supplements button will tag all Supplements and not Products. You can then click on the Delete button if you want to delete all Supplements.

**RCMS Utility - Post SCPS Project to RCMS**

**1295.1-1.100**

Set the Order Location and Deliver Locations if necessary

Done   
Post to RCMS  
Cancel

Minor	Dept	Classification	Phase	Qty	Make	Model	Description	Supplements	Tag 	
ESE	Product		3	1	Aragon	2007SIL	Amplifier		<input type="checkbox"/>	<input type="checkbox"/>
ESE	Product		3	1	B&K	AV360010	Amplifier		<input type="checkbox"/>	<input type="checkbox"/>
AWI	Bulk Wire & Cable		3	150	Monste				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AWI	Bulk Wire & Cable		3	150	Monste				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NQL	Labor		3	0:30:00	FLA				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NQL	Labor		1	0:15:00	FLA				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NQL	Labor		1	1:15:00	FLA				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NQL	Labor		1	0:05:00	FLA				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Message**

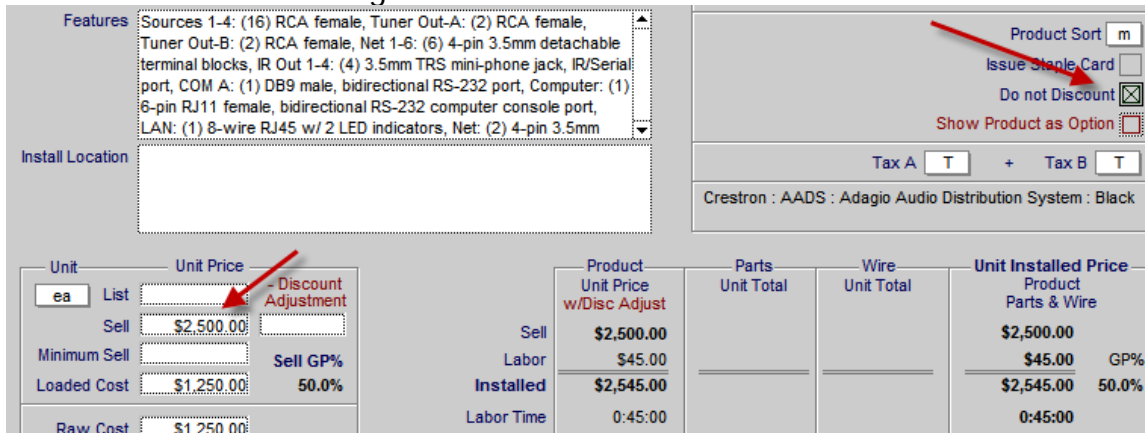
Tag or UnTag all Supplements

UnTag Tag Cancel

### Fix – Master Preferences/Users/Access Rights: Proposal Sell Price

User Access Rights to "change/not change" the Sell Price in a Proposal was not functioning properly, because the "Do not Discount" checkbox was interfering

with it. If a user has rights to change the sell price and "Do not Discount" is checked, then those rights will be denied for this product. If the user does not have rights to change the sell price then the "Do not Discount" checkbox will have no effect on those rights.



**Features** Sources 1-4: (16) RCA female, Tuner Out-A: (2) RCA female, Tuner Out-B: (2) RCA female, Net 1-6: (6) 4-pin 3.5mm detachable terminal blocks, IR Out 1-4: (4) 3.5mm TRS mini-phone jack, IR/Serial port, COM A: (1) DB9 male, bidirectional RS-232 port, Computer: (1) 6-pin RJ11 female, bidirectional RS-232 computer console port, LAN: (1) 8-wire RJ45 w/ 2 LED indicators, Net: (2) 4-pin 3.5mm

**Install Location**

**Unit Price**  **Discount Adjustment**

**Minimum Sell**  **Sell GP%**

**Loaded Cost**  **Raw Cost**

	Product Unit Price w/Disc Adjust	Parts Unit Total	Wire Unit Total	Unit Installed Price Product Parts & Wire	GP%
Sell	\$2,500.00			\$2,500.00	
Labor	\$45.00			\$45.00	
Installed	\$2,545.00			\$2,545.00	50.0%
Labor Time	0:45:00			0:45:00	

**Product Sort**  **Issue Staple Card** ☐ **Do not Discount** ☒ **Show Product as Option** ☐

**Tax A**  **Tax B**

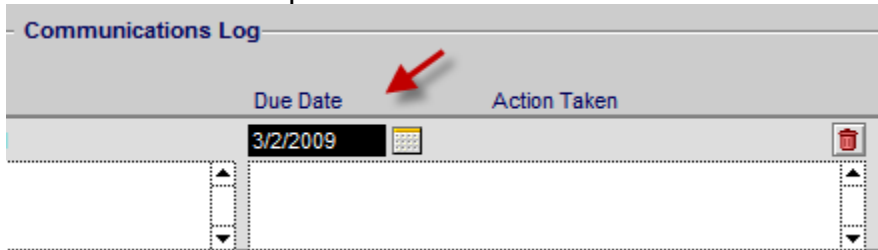
**Crestron : AADS : Adagio Audio Distribution System : Black**

### Fix – Contacts/Print Menu: Saving Letters & Faxes

When you create and print a Contact Letter or Fax, it is saved in the Letter Library for future use. This routine was not working properly and has now been corrected.

### Fix – Proposal & Contact Com Log: Remove Date field pop up

Removed the POP up value list on this field. It does not need one.



Due Date	Action Taken
3/2/2009	

### Fix – Product Library/Product Detail/Labor Override: Adding Labor 3

Adding labor categories and changing the Labor Cat field can pop up an error message that this is not allowed. This has been fixed.

### Fix – Master Tracker/Calendar: Icon Colors

All icon colors for Tasks and Milestones have been restored.

Show All	Find Items	Proposals	<b>Master Tracker</b>		<b>Milestones</b>	Gantt	Home
New Task	Past Today	Projects	Thursday		<a href="#">Proposals Due</a>	Leave	
New Appointment	This Week	Change Orders	March 3, 2009		<a href="#">Install Phases</a>	Calendar	Email All
	This Month	Completed	User: Jim Engandela		<a href="#">Payments Due</a>	Tracker	Print Menu
	Next Month	Tasks	6 Items		<a href="#">Purchasing Due</a>		
	Appointments						
Adm	Done	<b>Due Date</b>	<b>Tracker Item</b>	<b>Proposal Project</b>	<b>Item Owner</b>	Total Labor	Auto Tag
Mar	Hide	Month - Day	Item Name	Client	Email	0:00	eMail Info
User		Appoint Time	Description	Company	Status/Notes	Total Pymts	Print
							CC
							Delete
		3/21/2009	Proposal Task - Discovery	1269.1-1.100	Jim Engandela		
		Mar - Sat	Walk Through	Mike Hammerstad	horizon@trivest.net		
			Gather project details				
		3/23/2009	Proposal Task - Review	1269.1-1.100	Jon Oster		
		Mar - Mon	Design & Engineering Review	Mike Hammerstad	No email		
			Review client profile with Engineering				

## SCPS Version 7.3v2 Released: 2/17/2009

### Enhancement – Proposal Contract: Modify Page breaks

The last page of the Contract now starts at the Guarantee section. This has been changed on the Regular and the Custom Reports 7.4v2 Proposals.

### Enhancement – Access the Horizon Info screen from the Login screen

This is enables you to get info on Horizon Software before logging in.

### Enhancement – Upgrade Routine: Streamline Routine

The entire upgrade routine has been streamlined for improved efficiency and reliability.

### Enhancement – Upgrade Routine: LineItems Grooming

A utility now runs during the upgrade process that grooms the records in your LineItems file and restores any damaged keys.

### Enhancement – Info: New Record creation

If the Info file doesn't contain any records, one record is auto created.

### Enhancement – Control the FileMaker menu's System Wide

Control of the FileMaker menus has been improved to prevent accidental usage on all screens and modules including the Upgrade process.

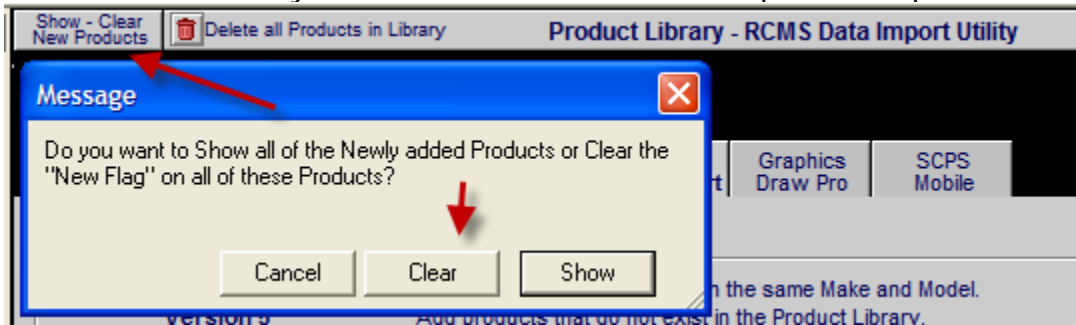
### Enhancement – RCMS: Import Products Routine: Flag Disciplines

A utility now runs during the import process that grooms your product library records and assigns a discipline of "Equipment" to any products that don't have a Discipline.

### Enhancement – RCMS: Product/Utility/RCMS: Clear New Products



You now have the option to Clear all of the Newly Added Product Flags as well as show all of the Newly Added Products after an RCMS product import.



#### **Fix – RCMS: Project: Pump Up: Use the Adjusted Sell Price**

The RCMS Pump Up now uses the Adjusted Sell Price on Products so that it works properly when a Global Price Adjustment has been used on a Proposal.

**SCPS Version 7.3**  
**Released: 2/5/2009**

#### **Enhancement – Log In screen Timer**

When opening SCPS or navigating to the Log In screen, a timer is automatically set. This timer automatically Exits SCPS, after 90 seconds, if the User doesn't click on the "3 – Login button. This timer prevents users from opening SCPS and failing to log in and thus tying up a guest workstation license.

# SmartPartner SOFTWARE

## High Definition Proposal & Project Management System

### 1 - Select User


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

### 2 - Enter Password for

Password

Enter Password and click the Login button.  
Do not press the Enter key.


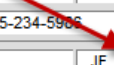
**3 - Login**



### Enhancement – Proposal Numbers: Use Characters & Numbers

You can now use alpha numeric characters in the Employee number, such as the Salesman's initials. This number becomes part of the Proposal number and makes it easy to identify proposals and projects.

Master Prefs - Users									
Users must have a Location (2 char max), First Name, Last Name, Employee AlphaNumber (5 char max) and Password									
<div style="display: flex; justify-content: space-between;"> <span>Users</span> <span>Network</span> </div>									
<div style="display: flex; justify-content: space-between;"> <span>+ Add User</span> <span>Users</span> </div>									
Location	Deactivate	Last Name	First Name	Initials	Employee AlphaNumber	Job Title	Login Password	Level & Rights	Assigned to User
1		Dowling	Dave	SR	51	Sales Specialist	DD	Project Mgr	Joel Roberts
		Phone Ext	Mobile #			Email		User	Project Eng
1		Engandela	Jim	JE	100JE	President	JE	Project Mgr	Joel Roberts
		Phone Ext	Mobile #			Email		Administrator	Project Eng

### Enhancement – Master Preferences/Proposal Contract: Print

You can now print Contract 1, 2 or 3 and each contract prints up to 5 pages.

Master Prefs - Proposal Prefs - Contract			
Cover Page	Text & Fees	Contracts	Proposal Print Options
Client Intro	Overviews	Terms	
Shop Intro	Extra Pages	Pricing	

Text can be up to 5 pages long

Location **1** Header

Contract 1 Name (default)

Contract 1

System Contract

Description

The attached equipment quotes, installation to as the proposal. All equipment, labor of proposal. Any changes or modifications Video.



Payments

All payments for this proposal must be in terms. <<Proposal Grand Total>>

**Message**

Select Contract 1, 2 or 3

3
2
1

### Enhancement – Proposal/Com Log: Print Single Log Entry

You can now Print all of the Com Log Entries using the Print button at the top of the screen or a Single Log Entry using the Print Icon on the Log Entry you wish to print.

Author	Creation Date	Action Taken	Due Date
Jim Engandela	1/20/2009 5:58:39 AM	Client wants surround sound mounted above the rear windows.	1/20/2009

### Enhancement – Proposal/Print Menu/Contract: Pricing Guarantee

You can now modify the Proposal price guarantee text or eliminate it completely. The User 7.3 Custom Print Layouts have also been modified.

#### PRICE GUARANTEE

Products & Installation prices are estimated. Total price will consist of installed products & actual installation. All labor, materials, trip charges and Monster Cables listed within this proposal are estimates only. An actual bill for all labor, materials, trip charges and cables will be hand written for each day of work and is due upon completion of each workday. Product prices are good (or guaranteed) for: 3/15/2009

#### PLEASE SIGN & RETURN

Date: \_\_\_\_\_ Jim Engandela or authorized signature on clients behalf

Date: \_\_\_\_\_ Jim Engandela, President

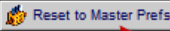

Set the text in the Master Preferences/Proposal/Pricing screen. Check the "No Text" box to remove the price guaranteed and date from the Contract. This will affect new proposals, not existing ones. If this text field is blank it will default to "Prices quoted are guaranteed until: "

Header Label	Price Guarantee	Pricing Text
Prices quoted are guaranteed until 60 Days		Product prices are good (or guaranteed) for:

Set the text in the Proposal/Print Menu/Preferences/Pricing screen for that specific Proposal.

Proposal Prefs - Contract Subtotals				?	Home	
Cover Page	Fees	Contract	Mr. Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100			
Client Intro		Terms				
Shop Intro	Extra Pages	Pricing				
Contract Prices						
Header Label		Price Guarantee				
Prices quoted are guaranteed until		60	Days	No Text <input type="checkbox"/>	Pricing Text <input type="checkbox"/>	Product prices are good (or guaranteed) for:

Click on the Reset to Master Prefs button to set a specific Proposal to your Master Preferences settings.

Proposal Prefs - Cover Page				?	Home
 					
Cover Page	Fees	Contracts	Mr. Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100		
Client Intro		Terms			
Shop Intro	Extra Pages	Pricing			
				Done	Print Options

### Enhancement – Proposal/Contract: OverPrint Footer Compensation

Some printers and PDF's driver have resolutions which cause the body of the contract to overprint into the footer in Proposal Contracts. In order to compensate for this the Title Header cannot exceed 56 pixels and the Header cannot exceed 35 pixels. In addition all part sections have been set to print across page breaks. The layout print button has also been reduced to 56x18 pixels. This modification has been applied to the User Reports module as well, so if you are using this module to print your Proposals then you will need to use the User Custom Reports version 7.4 and greater

### Enhancement – Proposal/Print Menu: Contract Push Lines

A new screen enables you to push sections on the printed Contract prevent page breaks from splitting the Warranty, Price Guarantee, Payment Terms and Payment Totals. Please follow the directions on the Push Lines screen to use this feature. Special Note. The User Custom Reports version 7.4 and greater have this new feature. Please upgrade to this version if you wish to use this feature.

Proposal - Print Menu	Push Lines	?	Home
Joel Roberts		Done	
Home Entertainment System		Preferences	
1291.1-1.100		Print Options	

Proposal Prefs - Print Options - Push Lines

Joel Roberts

Home Entertainment System  
1291.1-1.100

Instructions

Pushing will add blank lines before the designated sections.  
Enter Only Carriage Returns, Do not enter Text into these fields.  
Enter a Max of 10 Carriage Returns & do not Exceed the Borders.  
Use the Clear Icon or Backspace Key to remove returns.

Contract

Clear All

1 Before the Warranty

2 Before the Payment Terms

3 Before the Contract Totals

4 Before the Price Guarantee & Signature

Change this...

- \$5.00 Courtesy Discount	Installation	\$103.33
\$961.08 Total	Misc. Parts	
	Wire & Cable	
	Additional Fees	\$43.80
	Total	\$961.08
	PST Tax	\$50.45
	GST Tax	\$0.00
	Grand Total	\$1,011.53

To this...

## ELECTRONICS & INSTALLATION

\$986.08 List Price  
- \$5.00 Courtesy Discount  
\$981.08 Total

Equipment \$813.95  
Installation \$103.33  
Misc. Parts  
Wire & Cable  
Additional Fees \$43.80  
Total \$981.08  
PST Tax \$50.45  
GST Tax \$0.00  
Grand Total \$1,011.53


### Enhancement – Proposal/Product Detail: Product Cue Notes

Product Cue Notes are now displayed on the Proposal Product Detail screen. The content of these notes come from the Product Library/Product Detail screen.

Unit	Unit Price	- Discount Adjustment	Product Unit Price w/Disc Adjust	Parts Unit Total	Wire Unit Total	Unit Installed Price Product Parts & Wire
ea	List					
	Sell	\$390.00	\$390.00			\$390.00
	Minimum Sell	\$300.00				\$73.33 GP%
	Loaded Cost	\$234.00				\$463.33 41.6%
	Raw Cost	\$234.00				0:50:00
	Discount					
	Parts Cost	Wire Cost				
Unit	\$0.00	\$0.00				
Extended		\$0.00				

Extended Qty	Product Ext Price w/Disc Adjust	Parts Ext Total	Wire Ext Total	Extended Installed Price Product Parts & Wire
1	\$390.00		\$0.00	\$390.00
	\$73.33			\$73.33 GP%
	\$463.33			\$463.33 41.6%
	0:50:00			0:50:00

Product Cue Notes  This Cue can contain notes to help users when picking this product

### Enhancement – Project/Change Orders: Deletion Qty Trap

When creating a Change Order you are now notified that you cannot delete a Qty of a Product that is greater than the Original Product Qty. A new screen layout makes it easier to view the Original Product and the Change Order Product as well.

**Change Order - Change Quantity**

**Mark Dowling**  
**Atrium**  
**Linn : Knekt RCU**  
**Automation : Control : Keypad**

---

**Original Project Product**

**Message**

CO Deletion Qty cannot exceed the Original Quantity. Please enter a valid quantity.

Original Quantity

Product Sell

---

**Change Order Product**

Change Order Notes for this Product

Add or Subtract a Quantity

Product Sell

### Enhancement – Project/Final Change Order/Payments: Expanded

The Finalized Change Order screen has been expanded to enable you to enter multiple payments into each of the 5 Payment steps. This screen now resembles and functions like the Master Project Payment screen.

Finalized Change Order - Payment Terms						
John & Mary Smith						<input type="button" value="Print"/> <input type="button" value="Done"/>
Installation Type		Home Entertainment System				
New-3 Phase Pre-Trim-Final		1284.1c2-1.100				
Payment Director						
Payment Description	Deposit Deposit	Phase 1 Payment Payment 1 <small>Due 10 days before the installation final phase</small>	Phase 2 Payment Payment 2 <small>Due 10 days before the installation trim phase.</small>	Phase 3 Payment Payment 3 <small>Due 10 days before the installation final phase</small>	Holdback Holdback	Totals
Change Order	\$0.00	\$10,596.95	\$7,947.71	\$7,947.71	\$0.00	\$26,492.37
Add Payment Invoice	<input type="button" value="Invoice Pymt Amt"/>	<input type="button" value="Invoice Pymt Amt"/>	<input type="button" value="Invoice Pymt Amt"/>	<input type="button" value="Invoice Pymt Amt"/>	<input type="button" value="Invoice Pymt Amt"/>	<input type="button" value="Invoice Total Pymt Amt"/>
Date Invoiced	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
1 Payment Amt Made	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Pynt Made Dates	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Pynt Notes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
2 Payment Amt Made	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Pynt Made Dates	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Pynt Notes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
3 Payment Amt Made	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Pynt Made Dates	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Pynt Notes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Balance Due	\$0.00	\$10,596.95	\$7,947.71	\$7,947.71	\$0.00	\$26,492.37

### Enhancement – Master Project/Utility/Adm: Clear Change Order Pmts

A new utility has been created to clear All Master Project Pending and Final Change Order Payments Made, dates and notes. This affects all CO's for a specific Master Project. Caution: Do not use this feature if you want to keep some CO Payment amounts. If there are, it is better to simply go into the CO/Payment screen and clear the amounts you wish.

Project Utility - Administration

Jim & Gail Miller


Home Automation, Music & Structured Wiring  
1363.4-1.1


ExportAdmin


Change Project Number


This administration utility enables you to change the Project numbers on existing Project. Project numbers do not have to be unique to function properly, but keeping them unique is better from an organizational standpoint. This utility should be used with discretion.

Project Number	Project Version	Store Location	User Number
1363	4	1	1

 Repost Project Payment Totals (on this Project only)

 Repost Original Project Totals (on all Projects, please be patient)

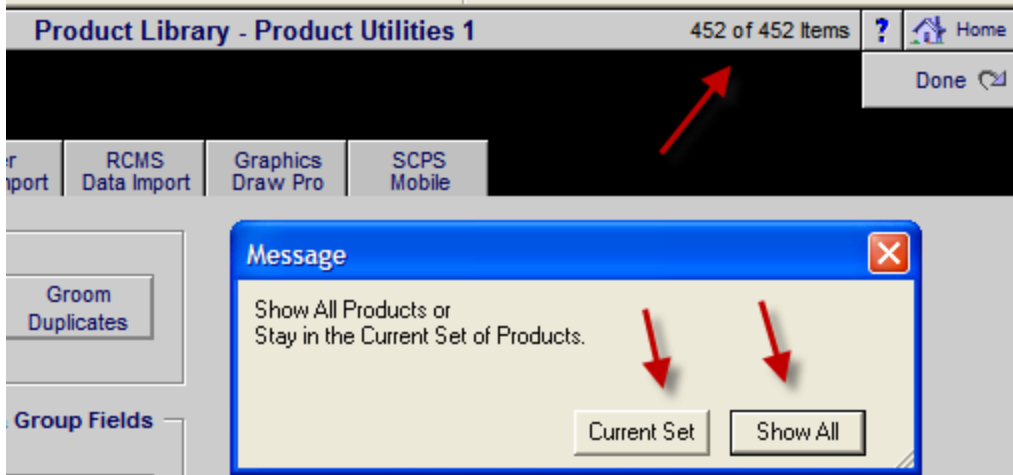
 Repost Final Change Order Totals (on all Projects, please be patient)

 Clear All Payments Made, Dates & Notes from all Master Project Change Orders

### Enhancement – Product Library/Utility: Done button

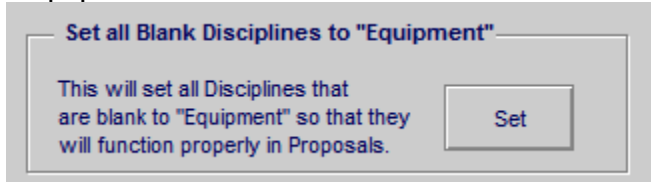
You now have the option to return to the Product Line List and Show All of Products or Show only the Current Set of Products which is now indicated by the Product Count at the top of the screen.





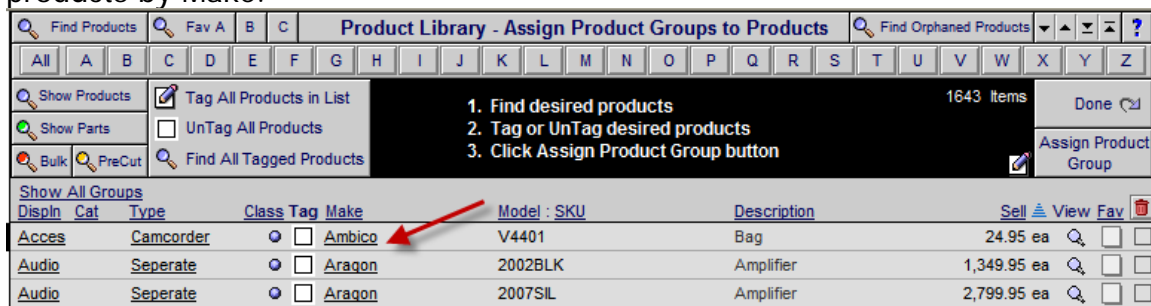
### Enhancement – Product Library/Utility/Set Blank Disciplines to Equip

- This Utility now quickly finds any Product with blank Disciplines and sets them to "Equipment".
- Also simply going into the Utility module will automatically set all Blank Disciplines to "Equipment".
- Leaving the Product Library module will automatically set all Blank Disciplines to "Equipment".
- Also the RCMS Product Import Utility will set all Blank Disciplines to "Equipment".



### Enhancement – Product Library/Utility/Assign Groups to Many Product

The Make field now has an underlined button that enables you to quickly find products by Make.



### Enhancement – Product Library/Find Product: Find No Sell Price

The Find Product/Find with More Criteria screen now has a button that will Find all of the Products in your Product Library that do not have a Sell Price assigned to them.

Product Library - Find Products with more Criteria		
Find Multiple Makes	Find No Sell Price	Done Find
Enter your find criteria and then click the Done/Find button		

### Enhancement – Product Library/Find Product: Pick Make

The Find Product Pick Make field has been changed to a Pop Up List so that you can select a Make easier and type in a Make or partial Make to quickly find all of the Products in your library of that Make.

Supplier	Product Library - Find Products																									
Primary Install Phase	Enter find criteria and click the Done/Find button																									
<b>Pick Make</b> Pick Make and Model Make Pop Up List <b>Audio Control</b> Ambico Aragon Arrakis Systems Inc Audio Authority <b>Audio Control</b> B&K Becker Design Bellfoggetti Billybags Designs Bose Boston Acoustics	<b>Fast Find Model</b> Enter characters, left to right from the Model/SKU number Type Model Type SKU <b>Pick Model</b> DVA RACKMOUNTS RIALTO	<b>Product Groups</b> Discipline Category Pick a White Group (gray groups do not) <table border="1"> <tr><td>Audio</td><td>Amplifier</td><td>Ir</td></tr> <tr><td>Audio</td><td>Amplifier</td><td>M</td></tr> <tr><td>Audio</td><td>Amplifier</td><td>P</td></tr> <tr><td>Audio</td><td>Amplifier</td><td>S</td></tr> <tr><td>Audio</td><td>Amplifier</td><td>S</td></tr> <tr><td>Audio</td><td>Amplifier</td><td>S</td></tr> <tr><td>Audio</td><td>Amplifier</td><td>S</td></tr> <tr><td>Audio</td><td>Control</td><td>M</td></tr> </table>	Audio	Amplifier	Ir	Audio	Amplifier	M	Audio	Amplifier	P	Audio	Amplifier	S	Audio	Amplifier	S	Audio	Amplifier	S	Audio	Amplifier	S	Audio	Control	M
Audio	Amplifier	Ir																								
Audio	Amplifier	M																								
Audio	Amplifier	P																								
Audio	Amplifier	S																								
Audio	Amplifier	S																								
Audio	Amplifier	S																								
Audio	Amplifier	S																								
Audio	Control	M																								

### Enhancement – Product Library/Product Detail: Improve Layout

Improve the arrangement of misc product fields.

Product Library - Product Detail		1 of 345	Home
<b>Crestion</b> <b>AADS</b> Adagio Audio Distribution System Audio : Multi-room : Switcher		Done Return to List Prev Next	
Labor	Parts	Wire	Tasks
Product Group <b>Audio : Multi : Switcher</b> Product Classification <b>Product</b> Primary Install Phase <b>2 Trim</b> Favorite <input type="checkbox"/> Fee SKU <input type="checkbox"/> Proposal Sort <b>m</b> Phantom Product <input type="checkbox"/> Purchasing Lead Days <b>7</b> Cost Value <b>\$8,750.00</b> Optimum On-Hand Qty <b>7</b> ReOrder Point Inventory Qty On-Hand Qty to Order ? Alt PO Vendor New Product Flag <input type="checkbox"/> Do not Delete <input type="checkbox"/> Hide this Product <input type="checkbox"/> Do not Hide <input type="checkbox"/> Issue Staple Up Card <input type="checkbox"/> Do not Discount <input type="checkbox"/> Tax A <b>T</b> + Tax B <b>T</b>			
ut-A: (2) RCA female, Tuner 1 3.5mm detachable terminal hone jack, IR/Serial port, COM rt, Computer: (1) 6-pin RJ11 onsole port, LAN: (1) 8-wire 3.5mm detachable terminal detachable terminal blocks, 169-2 coaxial, AM Ant: (2)			

## Enhancement – Product Set Library: Show Install Prices

The Total Extended Installed price of a Product Set is now available for viewing, by clicking on the Sell price next to a Product Set.

The screenshot shows the 'Product Set Library - Product Subsets' window. At the top, there are buttons for 'Duplicate Set', 'Delete Set', 'Print', '?', and 'Home'. Below these, the title 'MultiRoom - Main - Better' is displayed, along with '8 of 18' and 'Done'. A 'New Product Set' button is on the left. A note states: 'Indicates an orphaned subset' and 'Product must exist in Product Library to become a Subset'. The 'Set Name' is 'MultiRoom - Main - Better' and the 'Set Description' is 'Kivor Index/Intersekt System'. Below this is a 'Product Subsets' table with columns: Qty, Make : Model, Description, Unit Sell, and Total Sell. The table lists several items, including 'Knekt Roomamp', 'Roomamp 2i', and 'Kivor Index/Intersekt System'. A modal window titled 'Installed Set Price (please expand window to show prices)' is open, displaying the following information:

Category	Price
Total Product Price	\$81,748.33
Total Parts Price	\$3,140.00
Total Wire Price	\$6,445.45
Total Labor	\$3,487.50
=====	
Total Extended Installed Price	\$94,821.28

An 'OK' button is at the bottom of the modal. At the bottom of the main window, there are two summary rows: 'Total Set Sell (does not include supplements)' for \$81,748.33 and 'Total Set Installed Sell (includes supplements)' for \$94,821.28. A red arrow points to the 'Total Set Installed Sell' row, and another red arrow points to the 'View Detail' link next to it.

Find Product Sets Fav A B C Product Sets Library - List View 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

New Product Set

EME audio & video

18 Sets Leave Products Print Menu

Indicates an orphaned subset

Dup	View	Set Name	Quick View	Set Description	Set Text	Notes	Set Total (Installed)	Fav	
		AV System - Linn Klassik - Better		Classik - DVD - Katans/Trikan/Sizmik			\$17,775		
		AV Sytem - Linn Klassik - Good		Classik - DVD - 5 Unik speakers & Afekt subwoofer			\$17,045		
		Linn Klassik System B		Classik with Ninka speakers			\$10,400	A	
		Linn Home Theater A		60" Sony rear projection with Linn Surround B			\$32,410	A	
		Linn Home Theater B		Classik surround with 27" TV			\$13,994		
		Multiroom - Local - Good		Basic Knekt Local Room System			\$8,783	A	
		MultiRoom - Main - Best		Kivor/Intersekt System - 16 Room			\$137,260		
		MultiRoom - Main - Better		Kivor Index/Intersekt System			\$81,748		
		Multiroom - Main - Good		Basic Knekt Local Room System			\$8,783	A	
		Music - Linn Klassik - Best		Classik - DVD - Katans/Trikan/Sizmik			\$17,775	A	
		Music - Linn Klassik - Better		Classik - DVD - 5 Unik speakers & Afekt subwoofer			\$17,045	A	
		Music - Linn Klassik - Good		Classik with Ninka speakers			\$10,400	A	
		Music - Linn HiFi - Best		60" Sony rear projection with Linn Surround B			\$32,410	A	
		Music - Linn HiFi - Better		Classik surround with 27" TV			\$13,994	A	
		Music - Linn HiFi - Good		Basic Knekt Local Room System			\$8,783	A	
		New Set		Kivor/Intersekt System - 16 Room			\$137,260	A	
		Reference AV System		Kivor Index/Intersekt System			\$81,748	A	
		Reference Music System		Basic Knekt Local Room System			\$8,783	A	

Installed Set Price (please expand window to show prices)

MultiRoom - Main - Better  
Kivor Index/Intersekt System

Extended Prices

Total Product Price: \$81,748.33

Total Parts Price: \$3,140.00

Total Wire Price: \$6,445.45

Total Labor: \$3,487.50

=====

Total Extended Installed Price: \$94,821.28

OK

### Fix – System Wide Screen Size: Auto Set to Computer Screen

When opening SCPS the Open\_File Routine now auto sets the Prefs screen size field to "Computer Screen".

### Fix – Proposal/Product Detail/Labor: Add Labor to Product

Adding Labor to a specific product now adds the labor to that Product instead of adding it to the Area the product belongs to, like it does when adding labor to an Area. The Product Make and Model is now displayed on the Labor screen to make this clear.

Alt Labor View Primary Phase: 2 Trim Proposal - Product Labor Supplements 4 of 24 ? Home

Jim Engandela Horizon Software 1267.1-1.100

Labor Sub Cats Done

Linn : Knekt RCU Automation : Control : Keypad

Prev Next

Product Specs Pxf - PDF's Labor Parts Wire Tasks 1 - Home Theater

Add Labor Supplement Phase 1+2+3 Total Labor for 1 ea Linn : Knekt RCU 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	1:00:00	1:00:00	\$30.00	\$30.00	\$60.00	\$60.00
3 - Training		\$50.00	\$100.00	1:30:00	1:30:00	\$75.00	\$75.00	\$150.00	\$150.00
4 - Parts Labor		\$30.00	\$50.00	0:30:00	0:30:00	\$15.00	\$15.00	\$25.00	\$25.00
5 - Wire Labor - Bulk		\$35.00	\$60.00	1:20:00	1:20:00	\$46.67	\$46.67	\$80.00	\$80.00

**Add Pure Labor Supplement - Type & Time**

Jim Engandela  
Horizon Software  
Home Entertainment System  
1267.1-1.100

Done

Select a Labor Type and enter Labor Time for this Area  
**Zone 1 - Home Theater**  
Linn : Knekt RCU

Labor Type	Labor Rate	Phase 1 Prewire (h:m:s)	Phase 2 Trim (h:m:s)	Phase 3 Final (h:m:s)	Totals
2 - Programming	\$80.00		1:30:00		1:30:00

### Fix – Proposal List/Duplication: Duplicated Overviews now unique

When duplicating a Proposal the Overviews are now duplicated so that they are unique so that you can change the Overview text on the original or duplicated proposal without affecting the other one.

### Fix – Proposal/Print Menu/Contract: Over printing into the footer.

Depending on your printer resolution it is possible to see the body of the contract over printing into the footer. This is not a SCPS problem but rather an inability for printers and pdf's to handle complex images. The layout body of the Contract has been reduced by 4" from it's maximum size to help printers reduce this over printing issue.

### Fix – Proposal/Contract: Grand Total merged field

When using the Proposal Grand Total merged field in the Contract body and selecting the "Do Not Show Tax" Option, this field now displays the Proposal SubTotal amount instead of \$0.00.

#### SYSTEM CONTRACT

##### Description

The attached equipment quotes, installation estimates and project descriptions are to be referred to as the proposal. All equipment, labor and materials quoted are valid for 30 days after receipt of proposal. Any changes or modifications to this proposal can only be made by EME Audio & Video.

Subtotal: \$87,688.71

Tax: \$.00

Grand Total: \$87,688.71

### Fix – Project/Change Order: Wire Supplements

When adding and deleting products on Change Orders all of the associated Wire Supplements are now properly show positive and negative values to match the original Change Order.

### Fix – Project/Change Order List: Unlock entities

When leaving the Project/Change Order List screen and returning to the Project List screen all entities are now automatically unlocked.

### Fix – Project/Pricing/Commissions: Print Commission Report

The Print button on the Commission screen has been fixed so that it now prints the correct report.

### Fix – Pending & Final Change Orders: Payments Made Amounts

When creating Pending and Finalized Change Orders, SCPS no longer posts the Master Project Payments Made Amounts, Dates and Notes on the Change Orders.

### Fix – Product Library/Utility: Assign Groups to Many Product

When selecting a Group to assign to all the products you have selected, you no longer are sent to the Product Detail screen as you are when you select a Group for a specific product from the Product Detail screen.



2 Products Selected		Product Library - Assign Product Group					2 Products Selected		?
<div>1. Select Product Group 2. Click Assign Group button to set 2 Products</div>								<div>Assign Group or Cancel</div>	
Audio : Amplifier : Stereo Receiver									
Pick	Sort	Discipline	Category	Type	Class	Install Phase			
	a	Audio	Amplifier	Integrated Amplifier	Product	3 Final			
	a	Audio	Amplifier	Multi-channel	Product	3 Final			
	a	Audio	Amplifier	Preamplifier	Product	3 Final			
							Group Navigator		
							Discipline - Show All		

### Fix – POS/Service Order: RMA number

We now clear the current RMA number and create a new one each time a new RMA is created. This reduces the possibility of the wrong number being carried forward each time a new RMA is created.

### Fix – Archive List: Proposal Creation Date

Archived Proposals now display their Created Date in the Archive List.

### Fix – RCMS Project Pump Up: Hold checkbox

The Hold checkbox now functions properly by not allowing any NQL items to be checked to be held. The Minor Dept ID is now displayed as well on the Pump Up screen.

**SCPS Version 7.2.3**  
**Released: 1/5/2009**

**Fix – Project/Change Orders: Labor Tax**

When converting a Pending CO to a Final CO the Labor Tax was being reset to "Tax" even if the Labor Tax flag was set to "Tax Exempt" on the Pending CO.

**Fix – Product Library/Utility button**

If no products are showing in your library, the Utility button was not functional. This has been corrected.