



# SmartPartner Software

2010 Revisions and Enhancements  
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. Upgrading brings 100% of your data forward to the new version.

Regards,  
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**SCPS Version 7.14v2**  
**Released: 9/28/2010**

**Enhancement – Preferences/Horizon/Admin Utility: Fix System Record**

This utility fixes Entity System Records that are hidden so that they show up in the Entity lists. This Utility was created for Advance Electronics.

**SCPS Version 7.14v1**  
**Released: 9/21/2010**

**Enhancement – Proposal/Projects/Completed: Screen Sorting**

All Proposal/Project/Completed and Archive List screens have a new Find and Sort System. This upgrade automatically resets the Find criteria and entities and enables Last Name and First Name to be posted to the Find criteria when creating new Proposals or changing names in an existing Proposal.

When you click on the AlphaFinder, Entities are displayed first by client Last name and then by Company name. If there is no Last Name, then the First Name will be used instead of the Last Name.

**Enhancement – Proposal/Supplements: New Screen GUI**

All Supplement screens (Labor, Parts, Wire and Tasks) now have an Edit button (formerly the View button) to edit Supplement details and a separator between the Product and the Supplement assigned to that Product. This new look offers better clarity.

Super View		Delete All Wire		Proposal - Wire Supplements						Wire Summary		Wire Detail		?  Home							
Areas		Text		Products		Ann & Bob Traaseth						Wire & Cable are Itemized				Done					
Labor		Parts		Wire		Tasks		Home Automation 1279.1-1.100						150 feet per Home Run 75 feet per Room Run				Wire Manager			
All Areas <input type="text"/>				Wire Supplements						Wire Total				\$3,041.20							
Wire assigned to Zone - Area      Qty    Make : Model				Class Edit <input type="checkbox"/> Sort		Bulk Run Type		No Labor		Wire Qty		Wire & Cable Make : Model		Install Phase		Tax A B		Unit Sell		Ext Sell	
1 - Home Theater    1 Linn : 5101 Personal				Bulk		Home				150 m		Linn : K10 Cable		1		<input type="text"/> <input type="text"/>		\$5.00		\$750.00 <input type="text"/>	
1 - Home Theater    1 Linn : 5125				Pre-Cut						1 pr		Linn : Black Interconnect		3		<input type="text"/> <input type="text"/>		\$120.00		\$120.00 <input type="text"/>	
1 - Home Theater    1 Linn : 5125				Pre-Cut						1 pr		Linn : Black Interconnect		3		<input type="text"/> <input type="text"/>		\$120.00		\$120.00 <input type="text"/>	
1 - Home Theater    1 Linn : 5125				Pre-Cut						1 pr		Linn : Black Interconnect		3		<input type="text"/> <input type="text"/>		\$120.00		\$120.00 <input type="text"/>	
1 - Home Theater    1 Linn : 5125				Pre-Cut						1 pr		Linn : Black Interconnect		3		<input type="text"/> <input type="text"/>		\$120.00		\$120.00 <input type="text"/>	
1 - Home Theater    1 Linn : Katan				Bulk		Room				75 ft		Linn : K20 Cable		1		<input type="text"/> <input type="text"/>		\$2.74		\$205.50 <input type="text"/>	
1 - Home Theater    1 Linn : Katan				Bulk		Room				75 ft		Linn : K20 Cable		1		<input type="text"/> <input type="text"/>		\$2.74		\$205.50 <input type="text"/>	

**Enhancement – Proposal/Parts & Wire Supplements: Change Phase**

Changing the Phase on Parts and Wire Supplements now also changes the Phase of the Labor Supplements associated to the Parts and Wire.

**Proposal - Product Detail - Parts Supplements** 1 of 1 ? Home

**Jon Oster**  
**1290.1-1.100**  
**Linn : 5101 Personal Handset**  
**Audio : Multi-room : Keypad**

Areas: Text Products  
 Labor Parts Wire Tasks

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

Parts Make Model Parts  
 Only products classified as "Parts" can be added

Qty	Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell
1 ea	Linn	Cirkus Kit	Main bearing upgrade for Sondek	3	387.00	645.00	645.00

## Enhancement – Project/Work Orders: New Sort Order

When you enter the Work Order module the items are now sorted by Zone-Area-Make-Model.

John & Mary Smith  
 1290.1-1.100

Install Work Orders - All - Products

Phase	Zone - Area	Make - Model	Finish	Qty Sold	Left to Issue	Qty to Issue	Qty Issued	Qty Installed	WO's to Date	Total Time	Left to Install	Left to Complete
3	1 - Home Theater	Linn : Melodik Active isobaric bass extension	Black	2 ea	0	2	2	2	2	2	2	2
3	1 - Home Theater	Runco : CL-610 DLP Projector	Black	1 ea	0	1	1	1	1	1	1	1
3	1 - Home Theater	Sony : DVP-DS99ES Progressive Scan DVD Player	Black	1 ea	0	1	1	1	0:30:00	1	1	1
3	1 - Home Theater	Linn : 5101 Personal Handset Universal learning remote	Black	1 ea	0	1	1	1	0:50:00	1	1	1
2	1 - Home Theater	Linn : Knekt RCU Knekt room control unit	White	1 ea	0	1	1	1	1:30:00	1	1	1
3	2 - Living Room	Klipsch : RC-35 Center Channel Speaker	Black	1 ea	0	1	1	1	0:20:00	1	1	1
3	2 - Living Room	Klipsch : RF-35 Reference Tower Speaker	Black	2 ea	0	2	2	2	4:00:00	2	2	2
3	2 - Living Room	Klipsch : RS-7 Reference Surround Speaker	Matte	2 ea	0	2	2	2	0:40:00	2	2	2
3	2 - Living Room	Klipsch : RSW-10 Reference Subwoofer	Black	1 ea	0	1	1	1	1:00:00	1	1	1
3	2 - Living Room	Linn : Classik Movie Di Integrated multi-channel DVD-CD	Black	1 ea	0	1	1	1	1:45:00	1	1	1
3	2 - Living Room	Linn : Ninka Floor-standing loudspeakers: pair	Black	1 pr	0	1	1	1	2:00:00	1	1	1
3	3 - Office	Linn : Classik Movie Di-B Integrated multi-channel DVD-CD	Blue	1 ea	0	1	1	1	1:45:00	1	1	1
3	3 - Office	Linn : Classik Speaker Package Complete 5 speaker surround system with		1 ea	0	1	1	1	3:30:00	1	1	1
3	3 - Office	Sony : KDE-S0XS955	Silver	1 ea	0	1	1	1	2:50:00	1	1	1

## Enhancement – POS/Work Order: Increase printed notes field.

The size of the printed notes field at the bottom of the POS Work Order has been increased to 6 lines.

<b>Total Labor:</b>	<b>0:00:00 Hrs</b>	<b>0.00</b>
<b>Other Charges</b>	<b>Amount</b>	
<b>Total Other:</b>		

Payments


- Total Payments: \_\_\_\_\_

**Remaining Balance: 160.49**

1  
2  
3  
4  
5  
6

Acceptance Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*All installation workmanship is guaranteed for a period of ninety (90) days. Unless otherwise stated, manufacturer's warranties on all goods purchased from EME Audio & Video Systems will be honored by manufacturer only.*

## Enhancement – Product Library/Detail List: Add/Clear Picture button

You can now add or clear Pictures to your Products directly from the Detail List screen, like you can from the Product Detail/Pix screen.

The screenshot shows the 'Product Library - Detail List' interface. At the top, there are tabs for 'All', 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V'. Below these are buttons for 'Show Products', 'Part', 'Phantom', 'Bulk', and 'PicOut'. The main section displays product details for a 'Klipsch RC-35' speaker. A red arrow points to a new button labeled 'Add/Clear Picture' located in the top left corner of the product details area.

## Enhancement – Product Library/Utility/Functions: Find Embedded Pix

This utility finds all of the Products that have Embedded Pix vs Linked Pix.

The screenshot shows a utility window titled 'Find Products with Pictures and Pdf's'. It contains three buttons: 'Find All Products with Pix', 'Find Embedded vs Linked Pix', and 'Find All Products with PDF's'. A red arrow points to the 'Find Embedded vs Linked Pix' button.

## Fix – Proposal/Area & Products: Product Detail with Supplements

If you added a Pure Supplement with a Group that sorts it before any Products, you were blocked from viewing the Product Detail when you click on the Product View icon on any item. This had been corrected.

The screenshot shows the 'Proposal - Areas & Products' interface. It displays a list of products in a table. A red arrow points to the 'Product View' icon (a magnifying glass) on the 'Audio Amplifier: Multi-channel' item.

```

"nav.prodDetailTab [subs] [post]_x"

+ If ["0"]
+   If ["zc.statusKind <> 'p'"]
+     Exit Script
+   End If
+ End If
    
```



### Fix – POS/Quotation: Converting Quote to Sales Invoice

If you change the Setup values such as Tax Rate or Labor Rate in the Setup screen of a POS Quotation and then Convert the Quote to a Sales Invoice, these fields were picking up the Master Preferences Setup values. This has been corrected and all POS Invoice Setup values (specific to a Quotation) are now maintained when converting a POS Quote to a Sales Invoice.


### Fix – Proposal/Print Menu/Shop: Areas by Phase with Totals

Added posting routine to this report to insure accurate Grand Totals are displayed.

### Fix – Contacts: Proposal & POS Address Label

Properly format the label when there is only a Company name and no contact Names.

```
favCURRENT ADDRESS LABEL.c =  
Case(  
  favCONTACT.c = "",  
  Case(  
    COMPANY = "" & " " & COMPANY & " " & Case(not IsEmpty(careOfName.c), careOfName.c & " ") &  
    Case(not IsEmpty(CURRENT ADDRESS), Trim(CURRENT ADDRESS) & " ") & " " &  
    Case(not IsEmpty(CURRENT CITY), Trim(CURRENT CITY) & " ") & Upper(CURRENT STATE) & " " & Upper(CURRENT ZIP) & " " & CURRENT COUNTRY,  
    favFUTURE ADDRESS LABEL.c
```



### Fix – Upgrade Utility: Rapid Exit.

After upgrading some older versions of SCPS were not exiting properly and sometimes required the ESC key on your keyboard to be pressed. This has been addressed.

### Fix – Upgrade Utility: Groom Main Records for Status Kind...Hide

When you upgrade SCPS will automatically groom all of your Proposals and Projects and find and fix any Area Records that have a Status Kind of “hide”. This insures that Areas in a Proposal will be displayed properly on the Main Proposal Detail screen.

**SCPS Version 7.13v1**  
**Released: 8/5/2010**

**Enhancement – Proposal/Print Prefs/Pricing: Modify Pricing Labels**

In a Proposal if you choose to not show a Label like Fees, then you may want to not show the “+” that shows when you combine Subtotals. Otherwise you might have a Subtotal label that has undesirable delimiters. Checking the Manual option enables you to enter your own delimiters into the labels to suit.

**Subtotal Labels**

Header Label: Electronics & Installation

Show Number of Subtotals: 3 Subtotals

Manually Add Delimiters between Subtotal Labels: ☐

Products: Equipment, Installation, Misc. Parts, Wire & Cable

Additional Fees:

Subtotal: Total, No Tax Subtotal: Total (Tax not included)

Tax A: , Tax B: , Total Tax: Tax

Grand Total: Grand Total

Equipment, Misc. Parts + Wire & Cable, Installation +, Total, Tax, Grand Total

Changing the number of Subtotals places a "+" in the Label and this might be undesirable

**Subtotal Labels**

Header Label: Electronics & Installation

Show Number of Subtotals: 3 Subtotals

Manually Add Delimiters between Subtotal Labels: ☒

Products: Equipment, Installation, Misc. Parts, Wire & Cable

Additional Fees:

Subtotal: Total, No Tax Subtotal: Total (Tax not included)

Tax A: , Tax B: , Total Tax: Tax

Grand Total: Grand Total

Equipment, Misc. Parts + Wire & Cable, Installation +, Total, Tax, Grand Total

Checking the Manual option enables you to enter your own Delimiters to suit.

**Enhancement – Proposal/Contract: Increase the Price Guarantee**

The Price Guarantee field on the Main and Custom Contracts has been increased to accept up to 6 lines.

**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.  
Prices quoted are guaranteed until: 8/14/2010

**Please Authorize & Return**

Date:

Lee & Kris Christenson or authorized signature on clients behalf

## Enhancement – Proposal/Print Menu/Contract: More Signature space

Both the regular and custom reports have the space between the Client and Dealer Signatures increased to allow for electronic signatures on PDF's.

## Enhancement – Projects: Work Orders

Major enhancement to the Work Order module enables you to log issued WO's and the end of the day with Actual Install Time and Product Qty Installed and Installers name. You can log this info into both the Work Order and/or to the Products in the Work Order. You can add as many log entries as you wish and View/Edit/Delete them. A

All Log entries will be reflected back in the Project to give you a progress tracking on qty installed vs project qty and install time vs project time used.

There are many improvements to this module to make Issuing, Logging Actual and Tracking Work Orders.

**Work Order Detail**

Delete WO | Setup | Prev/Next | ?

Post WO | Show Area Text | Hide Time

WO Number 2009 - 1285.1-1.100 | Mike & Jessica Potter

WO Date 8/2/2010 | Home Theater System 1285.1-1.100

Posted Date 8/2/2010

Issue Installer | Notes

Est Install Time |

Scheduled Date |

Create Continuation WO | Pick List | Done

Auto Set Installed Qty | Install Tasks | Print & Post | View

Global Entry | Total Left to Install 4 | Total Time 19:15:00 | Edit Log

Sort	Zone - Area	Phz	Class	Item Notes	Qty	Make	Model	Description	Serial Numbers	Item Entry	Qty Installed	Left To Install	Install Time	Edit Log
1	Zone 1 - Home Theater				1 ea	Linn		5101 Personal Handset		+	1	0	2:00:00	Q
3	Product							Universal learning remote						
1	Zone 1 - Home Theater				1 ea	Linn		5125		+	1	0	3:00:00	Q
3	Product							Five channel power amplifier						
1	Zone 1 - Home Theater				5 pr	Linn		Katan		+	5	0	4:00:00	Q
3	Product							Bookshelf loudspeakers: pair						
1	Zone 1 - Home Theater				1 ea	Linn		Knekt RCU		+		1	1:30:00	Q
2	Product							Knekt room control unit						

All Phases				Phase 1				2	3	Wire Mgr	Install Work Orders - All - Products						PO	WO	SI					?	Home											
Mike & Jessica Potter											Labor Time Remaining on Project				Totals		Left To Install	Left to Complete	Create WO		Leave															
1285.1-1.100											Project Time 15:20:00				Products		4	4																		
											Installed Time 19:15:00				Parts		0	3	Auto Set		View															
WO Products											WO Parts				WO Wire				Sum		Proj		Labor Time Left -3:55:00				Wire		0	453	Qty to Issue		Work Orders			
Phase	Zone - Area		Make : Model Description				Finish Status		Qty Sold		Left to Issue		Qty to Issue		WO's to Date																					
															Qty Issued		Qty Installed		Total Time		Avg Time		Left to Install		Left to Complete											
3	1 - Home Theater		Linn : 5101 Personal Handset				Black		1 ea		0				1		1		2:00:00				0		0											
			Universal learning remote																2:00:00																	
3	1 - Home Theater		Linn : 5125				Silver		1 ea		0				1		1		3:00:00				0		0											
			Five channel power amplifier (Black)																3:00:00																	
3	1 - Home Theater		Linn : Katan				Black		5 pr		0				5		5		4:00:00				0		0											
			Bookshelf loudspeakers: pair																0:48:00																	



## Enhancement – Projects/Work Orders/Area Text: Work Order Notes

You can now add Work Order notes to Proposal, Project and Change Order Areas and these Work Order notes will be added automatically to each area of the Project Work Order. You can Edit these Work Order notes in your Project and Finalized Change Orders as well.

Products in: Zone 1 - Home Theater	REC	Proposal Text for: Zone 1 - Home Theater	Add to Library
Linn : 5125		This area includes the following products and features. home theater	
Linn : Katan		The design goal of this home theater is to recreate the movie theater sound to broadcast standards, so the artistic values of the movie director will be faithfully reproduced. this audio and video system will also blend in harmoniously with the decor of your home. eme is a licensed thx home theater designer. the thx surround sound system was developed by film director george lucas. mr. lucas was the director of star wars and the producer of the indiana jones movies. most of the action movies created today have been edited and scored at the lucasfilm movie studio called the skywalker ranch in northern california.	
Linn : Melodik		George lucas has received the prestigious Irving Thalberg award for developing the thx standard for the motion picture industry. this standard enables us to design your home theater to the same exacting standards as a thx film studio and a thx movie theater. your home theater will sound exactly like the studio where the film was produced. you will be able to hear and experience exactly what the director heard when he made the movie.	
Linn : 5101 Personal Handset		This home theater consists of a big screen tv, a digital surround sound processor, a main music amplifier with # watts of power per channel, a center voice amplifier with aa watts of power, a surround sound amplifier with # watts of power per channel. the sub woofer will be powered by a aa watt amplifier. video sources come from cable and a vcr, as well as a laser disc player. music sources come from a cd player and an fm tuner, as well as a cassette deck. all equipment can be controlled by remote control even with the cabinet doors closed.	
Linn : Knekt RCU		The surround sound processor will send the right sound to the right speakers to reproduce the movie theater sound as the director intended.	
Runco : CL-610		The surround sound speaker compliment includes two front music speakers, one center voice speaker and two rear surround speakers. the sub woofer will provide deep base for realistic	
Sony : DVP-NS999ES			
	REC	Work Order Text for: Zone 1 - Home Theater	
		Installers should pay particular attention to the clients request that the Home Theater speaker do not interfere with the fireplace controls. HT	

Area Labor: 7:45:00

Zone 1 - Home Theater

This area includes the following products and features. home theater

The design goal of this home theater is to recreate the movie theater sound to broadcast standards, so the artistic values of the movie director will be faithfully reproduced. this audio and video system will also blend in harmoniously with the decor of your home. eme is a licensed thx home theater designer. the thx surround sound system was developed by film director george lucas. mr. lucas was the director of star wars and the producer of the indiana jones movies. most of the action movies created today have been edited and scored at the lucasfilm movie studio called the skywalker ranch in northern california.

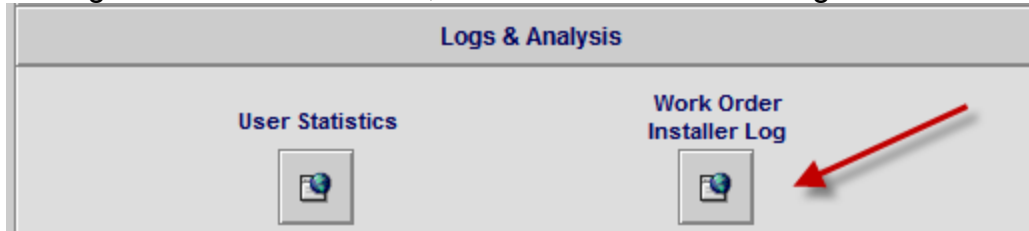
Zone 1 - Home Theater - Work Order Notes

Installers should pay particular attention to the clients request that the Home Theater speaker do not interfere with the fireplace controls. HT

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)

## Enhancement – Project Manager/Work Order Installer Log

This new module enables you to view all of the Work Order from all of your Projects and you can Find Install Logs by Date Range, Installer Name and/or Project and print a report of all of the Logs for that query. This can be used for issuing Installer Commissions, etc. You can also enter Log notes on the fly.



Project Work Orders - All Install Logs							
Find Install Logs		Total Install Time (h:m:s)		79:41:00		Leave	
Show All Logs		64 Items		Print Report			
Project	Work Order	Install Date	Install Time (h:m:s)	Installer	Install Qty	Make	Model
1284.1-1.100	2003	9/12/2006	8:00:00	LB	3	Linn	Katan
John & Mary Smith Home Entertainment System		Log Notes	This product needed extra time to install because the mounted bracket had to be modified		Install Notes	Bookshelf loudspeakers: pair	
1284.1-1.100	2003	9/12/2006	4:00:00			Klipsch	RF-35
John & Mary Smith Home Entertainment System		Log Notes			Install Notes	Reference Tower Speaker	
1284.1-1.100	2003	9/12/2006	0:40:00			Klipsch	RS-7
John & Mary Smith Home Entertainment System		Log Notes			Install Notes	Reference Surround Speaker	

## Enhancement – Project/PO/Invoice: Hide Prices Option Indicator

The option to Hide prices on your PO's now indicates that the prices are hidden with an "X" in the checkbox.

Purchase Order Detail Not Posted		Prev/Next	?
for Address	Ship To Address	<input type="checkbox"/> Hide Prices	Post PO
Linn	EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937	Auto Receive All PO Items	Print & Post PO View
		Done	

### Enhancement – CO/Print Menu: Add A/B Tax to Change Orders

Both Pending and Final Change Orders now can display A/B tax options and the option to do so has been added to the CO Print Options screen. The A/B Tax Labels are located on the Master Prefs/Pricing & CO Prefs/Pricing screens.

**Sales Tax**

Show Sales Tax ☒ Yes ☐ No

Contract Options Show Tax Totals **AB Tax**

Include Sales Tax in the Grand Total ☐ Yes ☐ No  
Do not show tax separately blank = no

#### ELECTRONICS & INSTALLATION

Equipment	\$10,900.00
Installation	\$390.00
Misc. Parts	\$285.00
Wire & Cable	\$956.25
Additional Fees	\$585.39
Total	\$13,116.64
GST Tax	\$689.22
PST Tax	\$0.00
Grand Total	\$13,805.86

### Enhancement – POS/All Invoices/Setup: Switch or Modify Contact

You now have the option to continue or Cancel this operation and if you Cancel you will be brought back to the Invoice Setup screen.

### Enhancement – Product Library/Utility/Export Products

A new module enables you to select Makes and Models that you wish to export and to export them in several file formats that can be imported into Excel or other databases. You can also print a report of all of the Products that you are exporting.

Follow the 1-6 buttons:

1. Update Make List (Creates a list of every make in the library)
2. Show Unique Makes (Shows this list of Makes on your screen)
3. Check Desired Makes (Enables you to check only the Makes you want)
4. Show Products (Shows the Products in the Makes you have selected)
5. Omit Undesired Products (Omit products you don't want to export)
6. Export Products (Exports your products and gives you File Options)

Product Library - Export Products

1 Update Make List 2 Show Unique Makes 3 Check Desired Makes 4 Show Products 5 Omit Undesired Products 6 Export 153 Products

153 Items 153 Total

Show All Groups		3 Check Makes		5 Omit Products		Description		Sell Price	Hidden
Displn	Cat	Type	Class	Make	Model	SKU			
Audio	Speak	Center Channel	<input type="checkbox"/>	Klipsch	RC-35		Center Chan	399.00	ea
Audio	Speak	Floor	<input type="checkbox"/>	Klipsch	RF-35 (6483)		Reference T	499.00	ea
Audio	Speak	Bookshelf	<input type="checkbox"/>	Klipsch	RS-7		Reference S	450.00	ea
Audio	Speak	Powered	<input type="checkbox"/>	Klipsch	RSW-10		Reference S	1,000.00	ea
Audio	Multi	Keypad	<input type="checkbox"/>	Linn	5101 Personal Handset		Universal lea	390.00	ea
Audio	Ampli	Surround Process	<input type="checkbox"/>	Linn	5103 System Controller		Linn 5103 inc DTS, no	5,500.00	ea
Audio	Ampli	Multi-channel	<input type="checkbox"/>	Linn	5125		Five channel power Silver	2,750.00	ea
Audio	Sourc	Phono	<input type="checkbox"/>	Linn	Akito		Pick up tonearm Black	1,100.00	ea
Audio	Sourc	CD Player	<input type="checkbox"/>	Linn	Classik Music-B		Integrated CD Blue	1,550.00	ea

Follow these 1-6 Steps

### Enhancement –Product Library/Utility/Distributors: SCPS Product Data

A new utility enables you to import SCPS Product Data that has been collated from other SmartPartners, Distributors and Manufacturers. Please note the terms and conditions. Products that are currently in SCPS will be updated and products that are not in SCPS will be added. Your Proposals and Projects will not be affected.

Product Library - Distributor Import Utility 153 of 153 Items ? Home

Done

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

**Terms & Agreements**

Horizon Software distributes Product Data as a courtesy to our SmartPartners. Horizon accepts no responsibility or liability for the accuracy of the distributed data. Please check the accuracy of this data before and after you import it. Import these files only if you understand and agree to these terms and conditions.

**Import from SmartPartner Product Collation File**

**Import SCPS File with Data Merging** **Import** Open the SCPS\_Product\_Collation.fp5 file that you downloaded onto your computer. Products that exist in your SCPS database will be updated with the current prices and new Products will be added to your SCPS products.

**Import Products from Capitol Sales**

**Download File** CapitolSales\_Items\_1

**Import File** CapitolSales\_Items\_1

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.
2. Open the CapitolSales\_Items\_1 file that you downloaded onto your computer. Products that exist in your SCPS database will be updated with the current Capitol prices and new Products will be added to your SCPS products.

### Enhancement – Product Library/Utility/Groom Products: Set CAPS

This utility will convert all of your Make names in the Product Library with 3 characters or less to all CAPS. Example: b&w = B&W.

**Groom Product Text Case**

This will convert the Make, Description, Warranty, Group, Class and Install Notes to normal case. Model will stay in Caps.

Convert all Make names with 3 characters or less to all CAPITAL letters.

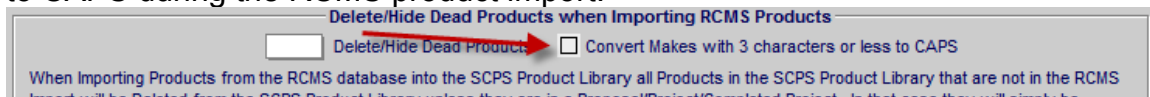
**Convert to Normal Case**

**Convert to ALL CAPS**

**Convert Make to ALL CAPS**

### Enhancement – Product Library/Utility/RCMS: Set CAPS

If you check this box in your Master Preferences/Bookkeeping/RCMS screen then any Products with Make names with 3 characters or less will be converted to CAPS during the RCMS product import.



### Enhancement – Product Sets /Set Detail: Do not show Hidden product

When adding Products to a Set the Model pop up list menu now does NOT show products from the Product Library and are marked as “Hidden”. This makes it easier to enter products into your Set.



### Enhancement – Contacts: Insert Text Line in Contact Label

You can now insert an optional text line into the Contact Label and this will appear on all Proposals and POS Invoice Labels. You can also suppress this text with the Suppress checkbox, so you can enter the text line on the Contact, but not have it appear in Proposals and POS. This line can be used for many things such as “c/o Builder Name”.

Find Contacts Replace Data **Contacts - Contact Detail** Print ? Home

**Hayes Callahan** New Contact New Proposal Done  
Duplicate Contact Delete Contact New POS Prev Next  
Print Menu New Task 1 of 12

**Contact** Details Com Log Entities Attachments Transactions

**Labels**

Category Client Class Key ID Fav  
? Create Vendor and 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
<input checked="" type="radio"/>	<input type="radio"/>		Hayes	Callahan			
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						

Label Insert c/o Master Builders, Inc. ☐ Do Not Show

Fav Address Phone Numbers  
☒ Address 1: 567 58TH Street  
☐ Home Phone ext cc 1



The Quality Name in Service and Value

**HOME THEATER SYSTEM**  
Version 1

Designed and Prepared for

Hayes Callahan  
c/o Master Builders, Inc.  
567 58TH Street  
Oakland, CA 94607

Print Setup Delete Quote Duplicate Quote POS - Quotation

Print: No Labor Detail Convert Quotation to an Invoice  
 Preview: Cost:

**Quotation**  
**QT #7195**

Label Address

Hayes Callahan  
 c/o Master Builders, Inc.  
 567 58TH Street  
 Oakland, CA 94607

Work: 715-287-4592

Hayes Call

### Enhancement – Upgrade Utility: Exit SCPS faster.

Improve the speed of Exiting SCPS for the Main Logo Screen and after running the Upgrade Process. (Remove Groom Duplicate Products routine in upgrade process. Switch to the Fast Open screen in the OpenSCPS).

### Enhancement - Contacts/Utility: Improve the Set Keys routine

The Set blank or Duplicate Keys routine is now much faster and sets and blank or duplicate Keys with keys based on the highest key in the system and sequentially increments them.

**Set Blank or Duplicate Contact Keys to new Values**

**Set Keys**

This utility will set a Key (zk.contact.p) value to all contacts that do not have one. Not having a contact key, can occur during an import of contacts from another database and will cause contacts to not function properly

### Critical Fix – Proposal/Areas: Adding Supplements to Renamed Areas

Under certain conditions, Renaming an Area and adding Pure Labor Supplements to that Area, caused Products in the Area to be deleted. This has been fixed.

Super View Sum View Auto Build Proposal - Areas & Products Labor Total Grand Total ? Home

Mike & Jessica Potter

Security System 1282.1-1.100

Equipment Installation \$23,289.95  
 Misc. Parts \$2,088.33  
 Wire & Cable \$4,353.70  
**Area Total \$31,036.98**

Labor Time 30:12:30

Areas Text Products

Loc Zone Areas No Prompt Pick or Type Area New Area

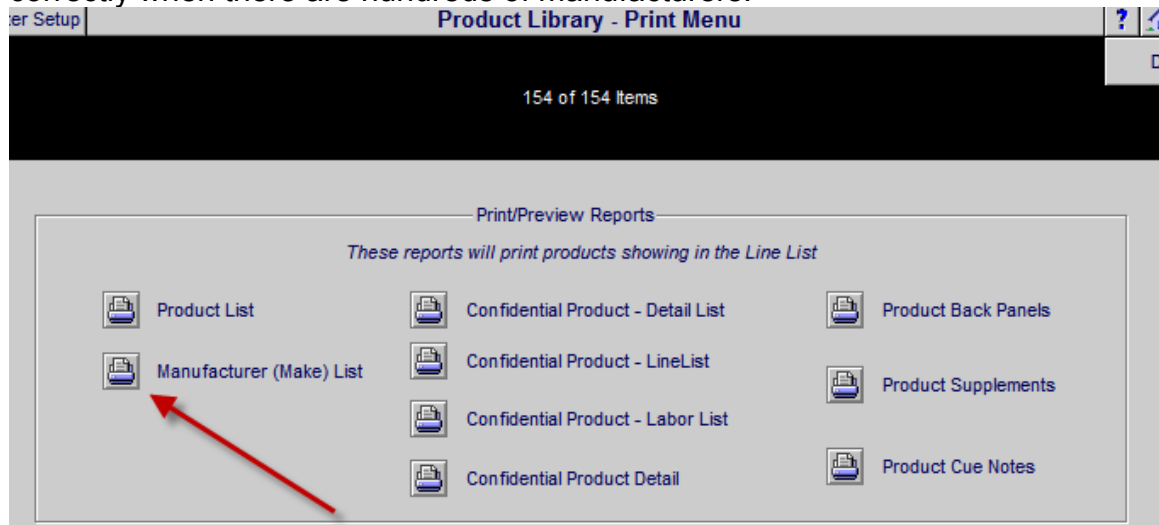
Location	Zone	Sort	Area	Rename	Set Dup
0	m		Bungalow		
1	m		Bathroom 2		
1	m		Renamed Area		

Products in the Zone 1 - Renamed Area

Discipline	Cat	Type	View	Qty	Sort	Make	Model	Unit	Sell	Tag
Audio				1	ea	Linn	5101 Personal Handset		\$390.00	
Multi-room				1	m	Universal	learning remote		\$390.00	
Audio				1	ea	Linn	5125		\$2,750.00	
Amplifier				1	m	Five channel	power amplifier		\$2,750.00	
Audio				5	pr	Linn	Katan		\$995.00	
Speaker				1	m	Bookshelf	loudspeakers		\$4,975.00	
Audio				1	ea	Linn	Melodik		\$4,950.00	
Speaker				1	m	Aktive isob	pass extension		\$4,950.00	
Audio				1	m	Supplemental	Items			
Video				1	ea	Runco	CL-610		\$7,995.00	
Display				1	m	DLP	Projector		\$7,995.00	
Video				1	ea	Sony	DVP-NS999ES		\$1,099.95	
Source				1	m	Progressive Scan	DVD Player		\$1,099.95	
Automation				1	ea	Linn	5101 Personal Handset		\$390.00	
Remote				1	m	Universal	learning remote		\$390.00	
Automation				1	ea	Linn	Knekt RCU		\$750.00	
Control				1	m	Knekt	room control unit		\$750.00	

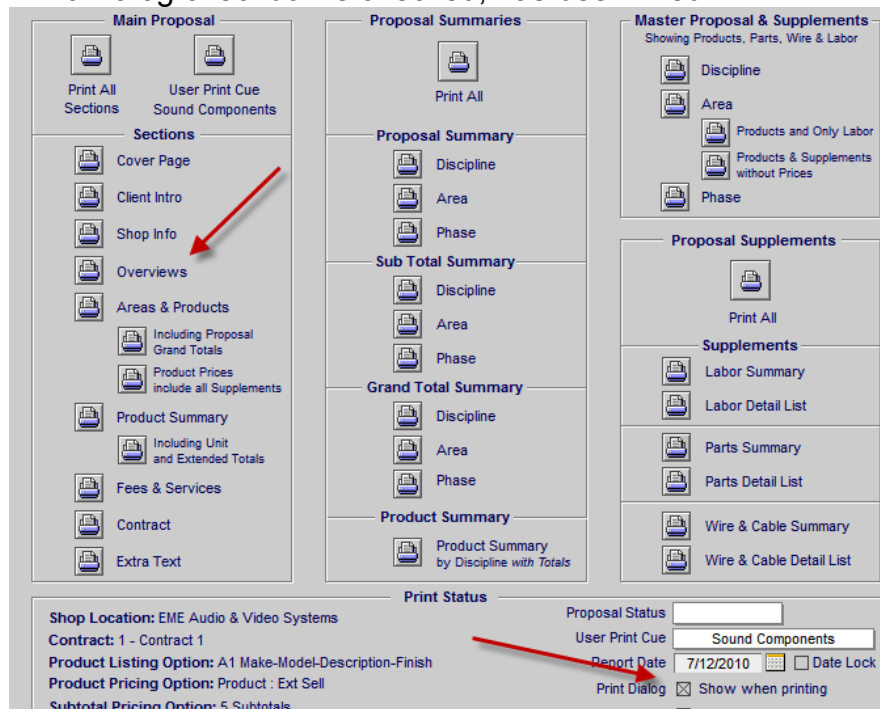
### Fix – Product Library/Print Menu: Manufacturers Make List

This report which prints a list of all of the Makes in your Product library now prints correctly when there are hundreds of manufacturers.



### Fix – Proposal/Print Menu: Overview show print dialog

The option to show the Print Dialog window when printing Overviews, when the Print Dialog checkbox is checked, has been fixed.



### Fix- Proposal/Labor Supplements/Print: Print correct Labor records

Printing the Labor Supplements from a Proposal now always prints the correct labor records by first verifying those records and against the proposal records and then printing the report.



Super View	Delete All Labor	Proposal - Labor Supplements					Print	Home
Areas	Text	Products	Jim Engandela					Done
Labor	Parts	Wire	Tasks	Home Entertainment System 1296.1-1.50				
All Areas		Labor Supplements		Labor Total		67:27:30	\$4,257.50	
Labor assigned to		Zone - Area	Qty	Make : Model	View	Labor Type	Tax A B	Instal Phases
								Hourly Rate
								Total Time with DOD (h:m:s)
								Ext Sell
		Bathroom 5	1	Linn : 5101 Personal Handset	Installation	T T	1,2,3	\$60.00
		Bathroom 5	1	Linn : 5101 Personal Handset	Parts Labor	T T	1,2,3	\$50.00

### Fix – Project/Work Order: Single Phase Parts & Wire

When selecting a single Phase to issue a Work Order the Parts and Wire were not being entered in the Work Order. This has been corrected.

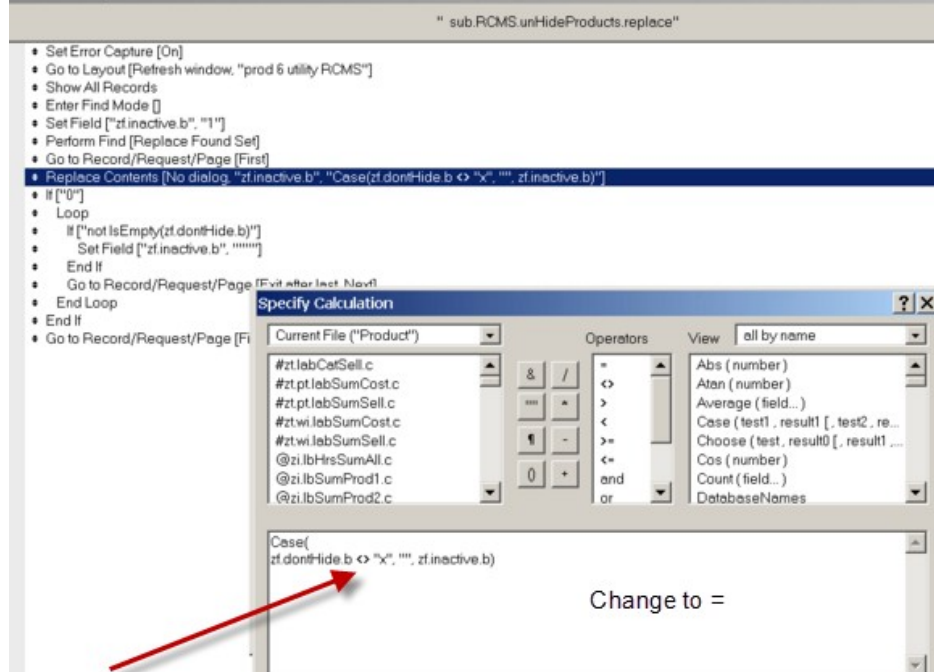
All Phases				Phase 1	2	3	Wire Mgr	Install Work Orders - All - Products					PO	WO	SI		
Mike & Jessica Potter								Labor Time Remaining on Project			Totals		Left To Install	Left to Complete	Create WO		
1285.1-1.100								Project Time		15:20:00	Products		4	4			
								Installed Time		19:15:00	Parts		0	3			
								Labor Time Left		-3:55:00	Wire		0	453	Auto Set Qty to Issue		
WO Products		WO Parts		WO Wire		Sum		Proj									
Phase	Zone - Area		Make : Model		Description		Finish Status		Qty Sold	Left to Issue	Qty to Issue	Qty Issued		Qty Installed		WO's to Date	Total Time
3	1 - Home Theater		Linn : 5101 Personal Handset		Universal learning remote		Black		1 ea	0		1		1		2:00:00	
																2:00:00	
3	1 - Home Theater		Linn : 5125		Silver		Silver		1 ea	0		1		1		3:00:00	
					Five channel power amplifier (Black)											3:00:00	

### Fix- Master Tracker: Do not show Tasks prior to today's date

The option to not show Tasks prior to today's date now works properly for all Tasks and works faster.

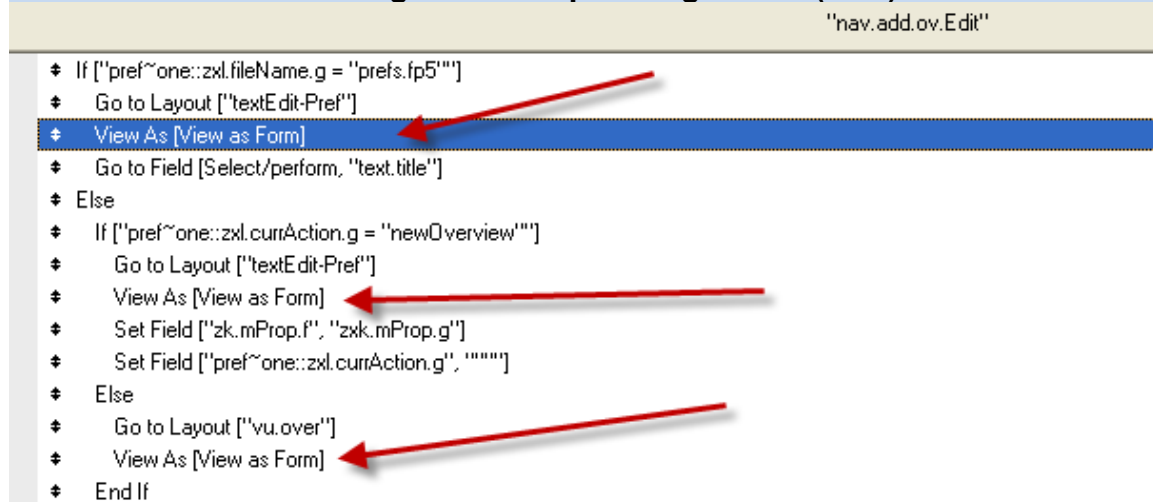
## SCPS Version 7.12v4 Released: 6/3/2010

### Fix- Products: RCMS Product Import correctly Hide removed products



## SCPS Version 7.12v3 Released: 6/1/2010

### Fix- Master Prefs: Picking Overview picks right one. (Text)



### Fix- Master Prefs: Remove initial login routine going into Prefs

"nav.companyTab"

```
Set Field ["zxl.fileName.g", ""prefs""]  
Go to Layout ["company"]  
Perform Script [Sub-scripts, "ops.optimizeWindow"]  
If ["0"]  
    Perform Script [Sub-scripts, "ops.initial Login Prefs Settings"]  
    If ["zzzf.screenSize <> zxf.screenSize.g"]  
        Perform Script [Sub-scripts, "ops.masterOptimizeWindow [sub]"]  
        Set Field ["zxf.screenSize.g", "zzzf.screenSize"]  
    Else  
        Perform Script [Sub-scripts, "ops.optimizeWindow"]  
    End If  
End If  
End If  
nd If  
If
```

Prefs

**SCPS Version 7.12v2**  
**Released: 5/27/2010**

### Fix- Products: Retain picked products

When Picking products from a proposal the last picked list is retained

"nav.pickList"

```
◆ End If  
◆ Go to Layout ["pick list"]  
◆ If ["0"]  
◆ Perform Script [Sub-scripts, "sub.sortNoSortOption"]  
◆ End If  
◆ Set Field ["zxn.layoutNum.g", "Status(CurrentLayoutNumber)"]
```

products

Go to Layout ["pos pick list"]  
Set Field ["pref~one::zxl.currAction.g", ""pos call""]  
Set Field ["zx.alphaFindWithHidden", """""]  
If ["0"]  
 Perform Script [Sub-scripts, "sub.sortNoSortOption"]  
 Perform Script [Sub-scripts, "fnd.all\_alphaFinder"]  
End If

Active Scripts:

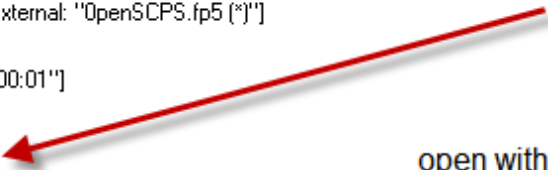
recx.pos.call { Product.fp5 }

### Fix- SCPSguest.fp5: File is not minimized when is opened.

Minimize file when it is opened so that it doesn't interfere with main screens.

```
"ops.onOpen"

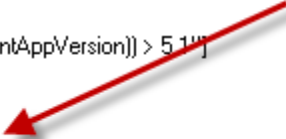
* Perform Script [Sub-scripts, "ops.fastOpen"]
* Perform Script [Sub-scripts, "ext.secureFM.DisableMenus.noM..."]
* If ["Status(CurrentRecordCount) = 0"]
*   New Record/Request
* End If
* #script:OpenSCPS::ops.openCoreFiles
* Perform Script [Sub-scripts, External: "OpenSCPS.fp5 (*)"]
* If ["0"]
*   Pause/Resume Script ["0:00:01"]
* End If
* Toggle Window [Minimize]
* #script:OpenSCPS::nav.login
* Perform Script [Sub-scripts, External: "OpenSCPS.fp5 (*)"]
```



open with password  
enable menus

```
"ops.optimizeWindow"

* Enter Browse Mode []
* Toggle Text Ruler [Hide]
* Toggle Status Area [Hide]
* If ["TextToNum(Status(CurrentAppVersion)) > 5.1"]
*   Allow Toolbars [Off]
* End If
* Toggle Window [Minimize]
```



**SCPS Version 7.12v1**  
**Released: 5/24/2010**

### **Enhancement- SCPS Screen Size & Screen Magnification**

All SCPS screens have been Optimized for PC and Mac computers.

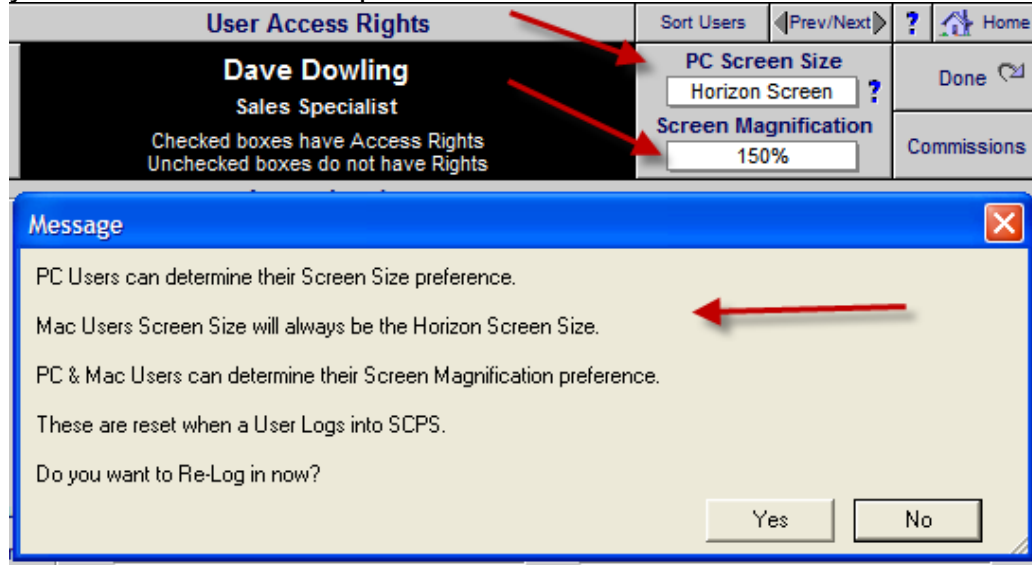
SCPS Screens for PC's (Windows) can be the size of your computer screen or the size of the SmartPartner screen. Mac users will now have all SCPS screens the size of the SmartPartner screen which enables them to have access to their desktop to the right of the SCPS screens.

SCPS screens can be magnified 150% or 200% to increase readability for high resolution monitors for both PC and Mac computers.

Each User can determine their own screen preference in the Preferences/Users/User Access Rights screen and the SCPS screens will be set accordingly when they log in.

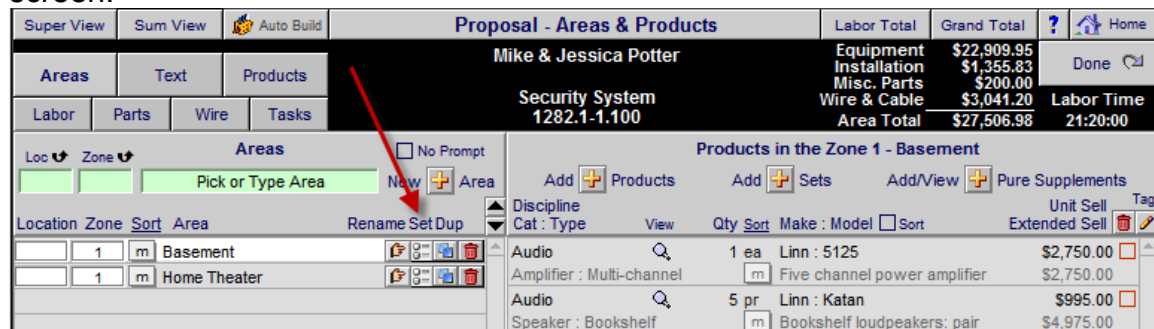
In order to accommodate all of the different permutations for both PC's and Mac's you will see a bit more screen flashing when logging into SCPS and navigating

through some screens. This enhancement as a major programming project and your feedback will be helpful as we refine it.



### Enhancement-Proposal/Areas & Products: Auto Create Product Set

You can now automatically create a Product Set with the Products from a Proposal Area. This Product Set can then be added to other Proposals as complete areas or additions to existing areas. When you create this Product Set you can Rename the Set, Change Quantities or Add/Delete Products from the Set. You can also create Product Sets from Projects in the Areas & Products screen.



**Product Set Library - Product Subsets**

**Basement** Done

• Indicates an orphaned subset      Product must exist in Product Library to become a Subset

Set Name:  Fav: ☐

Set Description:

**Product Subsets**

Class:  Make:  Model:  Add Subset

Qty	Make	Model	Description	Unit Sell	Total Sell
<input type="text" value="1"/>	ea	Linn : 5125	Audio : Amplifier : Multi-channel Five channel power amplifier (Black)	\$2,750.00	\$2,750.00
<input type="text" value="1"/>	ea	Linn : 5101 Personal Handset	Audio : Multi-room : Keypad Universal learning remote	\$390.00	\$390.00
<input type="text" value="5"/>	pr	Linn : Katan	Audio : Speaker : Bookshelf Bookshelf loudspeakers: pair	\$995.00	\$4,975.00
<input type="text" value="1"/>	ea	Linn : Melodik	Audio : Speaker : Powered Subwoofer Active isobarik bass extension	\$4,950.00	\$4,950.00
<input type="text" value="1"/>	ea	Linn : Knekt RCU	Automation : Control : Keypad Knekt room control unit	\$750.00	\$750.00
<input type="text" value="1"/>	ea	Sony : DVP-NS999ES	Video : Source : DVD Player Progressive Scan DVD Player	\$1,099.95	\$1,099.95

### Enhancement-Proposal & POS: Pick Products Sort Option

When Picking Products into a Proposal or POS you now have the Option to Sort the Product Library or not. We recommend Not Sorting to save time, because once you get to the Product Library you usually go find the Products you want anyway and if you want to sort you can always click on the All button in the AlphaFinder. The Product Library Sort Option is located in the Master Prefs/Other/Product 1 screen. This feature also insures that all of your Hidden are not shown when picking products.

**Master Prefs - Other - Products 1**

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

**Product Library**

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

## Enhancement-Proposal/Product Detail/Parts Supplements:Parts Phase

You can now change the Phase of Parts Supplements in a Proposal from this screen.

**Proposal - Product Detail - Parts Supplements** 1 of 1 ? Home

je  
1291.1-1.100  
Linn : 5101 Personal Handset  
Audio : Multi-room : Keypad

Areas Text Products  
Labor Parts Wire Tasks

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

Parts Make Model Add Only products classified as "Parts" can be added

Qty	Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell
2 ea	Linn	Cirkus Kit	Main bearing upgrade for Sondek	1	387.00	645.00	1,290.00
4 ea	Linn	Knekt RCU Install Kit	Install kit (contents listed below)	1	125.00	210.00	840.00
2 ea	Linn	Knekt RCU Metalwork	Back box	1	12.00	20.00	40.00

## Enhancement-Proposal/Print Menu: Master Proposal with all Labor

This new report shows the Products in the Proposal including all of the Labor required to install each product. It does not show any Parts or Wire Supplements but it does show the Parts and Wire labor required to install the product.

**Master Proposal & Supplements**  
Showing Products, Parts, Wire & Labor

Discipline  
Area  
Products and Only Labor  
Products & Supplements without Prices  
Phase

Security System  
for Mike & Jessica Potterx



Master Proposal by Area			
Zone - Area			
Discipline			
Make - Model - Description			
All Product Labor	Qty	Unit Price	Ext Price
Zone 1 - Basement			
<b>Audio</b>			
Linn : 5125 : Five channel power amplifier (Black) : Silver	1 ea	\$2,750.00	\$2,750.00
Installation	1:00 (h:m)	\$60.00	\$60.00
Wire Labor - Precut	0:20 (h:m)	\$60.00	\$20.00
Linn : Katan : Bookshelf loudspeakers: pair : Black	5 pr	\$995.00	\$4,975.00
Installation	1:40 (h:m)	\$60.00	\$100.00
Wire Labor - Bulk	3:07 (h:m)	\$60.00	\$187.50
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	1 ea	\$4,950.00	\$4,950.00
Installation	0:30 (h:m)	\$60.00	\$30.00
Calibration	0:30 (h:m)	\$100.00	\$50.00
Parts Labor	0:15 (h:m)	\$50.00	\$12.50
Wire Labor - Bulk	0:37 (h:m)	\$60.00	\$37.50

### Enhancement-Proposal/Product List: Includes SKU numbers

The Proposal Product List screen now includes the Product SKU number along with the Model number and the field size has been increased to show longer Make:SKU numbers.

### Enhancement-Proposal/Print Menu/Shop: Enhanced Product Summary

The Product Summary Report now includes the Product SKU numbers and the Proposal Grand Totals at the bottom of the report.



Labor (h:m:s) 15:40:00		Installation Phase: 3		Products, Parts & Wire Total: \$48,271.05	
				Labor Total: \$1,096.67	
				Phase Total without Fees: \$49,524.38	
Linn : 5101 Personal Handset : 22222	2 ea	\$234.00	\$390.00	\$780.00	
Linn : 5125 : 11111	2 ea	\$1,650.00	\$2,750.00	\$5,500.00	
Linn : Katan	10 pr	\$597.00	\$995.00	\$9,950.00	

5/7/2010					
EME Audio & Video Systems - Confidential Report					
Summary by Phase - Products/Supplements/Labor					
Mike & Jessica Potterx					
Security System					
1282.1-1.100					
Page 2					
Product -Make - Model		Qty		Unit Cost	
Part Wire				Unit Sell	
				Ext Sell	
Grand Totals		Sell	GP%	Cost	Profit
Equipment		\$45,819.90	40.2%	\$27,412.80	\$18,407.10
Installation		\$1,991.67	45.9%	\$1,076.67	\$915.00
Misc. Parts		\$400.00	40.5%	\$238.00	\$162.00
Wire & Cable		\$6,082.40	41.2%	\$3,577.44	\$2,504.96
Additional Fees		\$3,273.22	50.0%	\$1,636.61	\$1,636.61
Total		\$57,567.18	41.0%	\$33,941.52	\$23,625.67
Tax		\$2,986.17			
Grand Total		\$60,553.35			



## Enhancement-Proposal/Print Menu: Proposal by Area/Discipline/Phase

The field size of the Product Listing has been increased on all 3 of these reports and the 3 User Layout reports to accommodate 3 text lines.

**Home Entertainment System**  
for Jim Engandela

**EME**  
audio & video

---

Proposal By Discipline			
Discipline	Qty	Products	Grand Total includes Supplements & Tax
Zone - Area			
<b>Home Entertainment System</b>			<b>\$55,379.54</b>
<b>Audio</b>			<b>30,942.99</b>
Bathroom 5	1	Linn : 5101 Personal Handset : Universal learning remote : Black	390.00
Bathroom 5	1	Linn : Kivor Index 2000-S : Hard disk music library, 8 outputs, 2000 hours uncompressed storage : Silver	11,090.00
Bathroom 5	1	Linn : Kivor Oktal : 8 stereo channel D-A converter unit : Black	4,500.00
Bathroom 5	1	Linn : Kivor Tunboks : Archival/retrieval music system, 8 outputs / 500 hours uncompressed storage : Black	9,670.00

## Enhancement-Proposal Reports: Use Salesman's Email Address

You can now choose to use the Salesman's Email address in the Footer of all Proposal Reports instead of the Shop Email Address. In Master Prefs/Proposals/Proposal Print Options you can set this preference for new Proposals. In the Proposal/Print Menu/Print Options you can change this preference for that specific proposal. Note: If the Salesman's email address is blank in Prefs/Users then the Shop email will automatically be used.

**Other**  
Warranty Type ☒ Factory ☐ Extended  
Show Discount ☒ Yes ☐ No  
Use Salesman's Email instead of Shop Email in Footer ☒

---

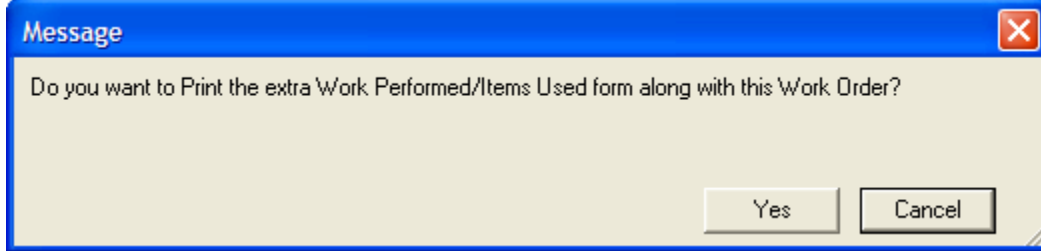
EME Audio & Video Systems 2950 Main Drive Eau Claire, WI 54701  
Ph: 715-287-3335 Fax: 715-287-4464 horizonJE@triwest.net www.horizon-software.com  
Proposal: 1292.1-1.100 May 6, 2010 Cover Page

## Enhancement-Project/PO & Sales Invoices: Adjust In Box Inventory

When you receive an item on a Purchase Order or Sell an item in a Sales Invoice within a Project, the Inventory Count in the Product Library Inventory Module is adjust (positive or negative). The Quantity New in Box is also adjusted at the same time to match the Qty on Hand adjustment.

### Enhancement-Project/Work Orders: Extra Work Order Option

Along with the regular printed Work Order you now have the option to print an additional Work Order page with Work Performed and Items Used sections.



Work Order Date	<b>EME Audio &amp; Video Systems</b>		Work Order Number																																																																																								
5/3/2010	<b>Work Order</b>		2008 - 1285.1-1.100																																																																																								
Page: 1																																																																																											
<b>Address 1:</b> Mike & Jessica Potter 587 58TH Street Oakland, CA 94607		<b>WO Installer</b> Sales Specialist Jim Engandela	<b>Project Manager</b> Joel Roberts <b>Project Engineer</b> Jon Oster																																																																																								
<b>Description of Work Performed</b>																																																																																											
<table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>																																																																																											
<b>Items or Problems Remaining</b>																																																																																											
Installer	Parts #	Description	Start	Finish	Qty	Amt	Ext																																																																																				

### Enhancement-POS/All Invoices/Setup: Pick New Contact

You can now switch the Contact on any POS Invoice, from the POS Invoice Setup screen. Instead of manually changing the contact info for this contact (which disconnects the POS Invoice from the Contact Library), you now can click on the Pick New Contact button and you will be taken to your Contact List where you can either pick an existing Contact or Add a new one. This new method maintains the data integrity of the connection between the POS Invoice and the Contact Library.

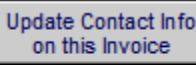
Primary Contact

 **Pick New Contact**

CONTACT Mike & Jessica Potter  
 COMPANY  
 ADDRESS 567 58TH Street  
 CITY Oakland  
 ST, ZIP, COUNTRY CA 94607  
 HOME PHONE: 715-830-5022  
 WORK PHONE:  
 CELLULAR:  
 FAX:

### Enhancement-POS/All Invoices/Setup: Update Contact Info


This feature updates the Contact info on this specific POS Invoice to the current info for this Contact from the Contact Library. Go to the POS Utility if you wish to Update the Contact info on ALL of your POS invoices.

 **Update Contact Info on this Invoice**

**POS - Invoice Set-Up**  
**Quotation**  
**QT #7190**

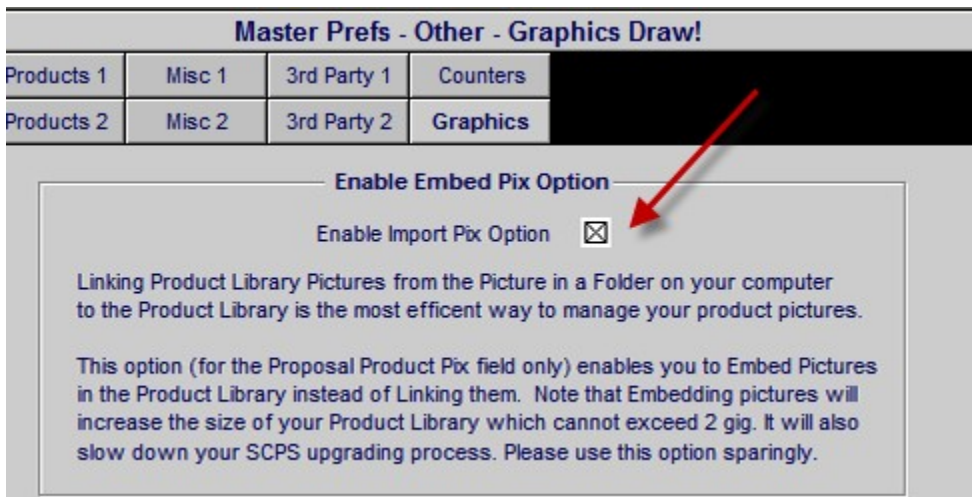
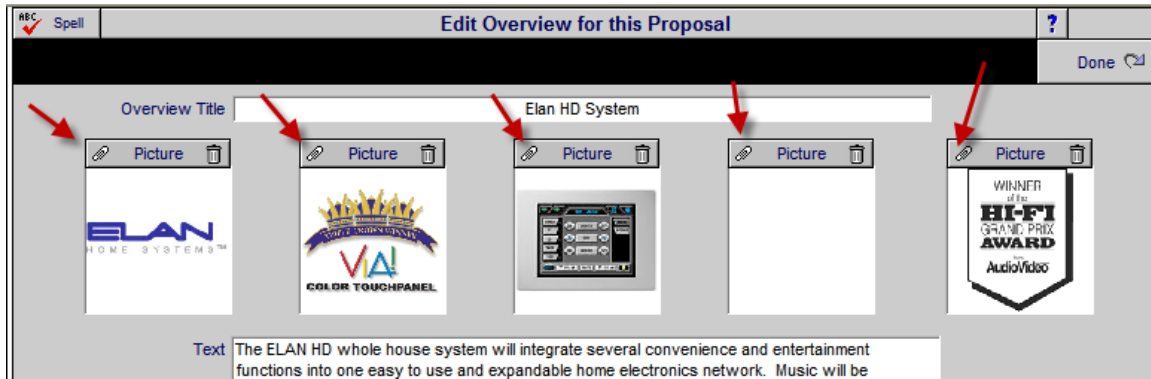
### Enhancement-POS/Utility/Re-Number Utility: Find Only Unique Dups

The POS Re-Number Invoice Utility now only finds Invoices with Unique Numbers which means that if an Invoice has a number with a different Invoice Kind prefix (QT, IV, PO, WO) then it is considered unique and will not be included in the Duplicate Find.

Find Quote		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
Print List	Set Setup invoice number to max #	<b>POS Re-Number Utility</b>																					Find Duplicate #	Done				
<u>Invoice</u>	<u>Client</u>	<u>Company</u>	<u>Date</u>	<u>Invoice #</u>	<u>Amount</u>	<u>Del</u>																						
PO #7196	Paul Klipsch	Klipsch Audio Technologies	4/25/2007	7196	PO																							
QT #7195	Cecilia Christenson	Wade Realty	4/25/2007	7195	QT	\$1,675.25																						

### Enhancement-Prefs/Proposal/Overviews & Proposal Overviews: Pix

Overview Pictures are now added to your Master Preference and Proposal Overviews as Linked Images instead of as Embedded Images to save space. The option to Embed Images instead of Linking them can be changed in the Prefs/Other/Graphics screen, however it is recommended that Pix be Linked and not Embedded to save space.

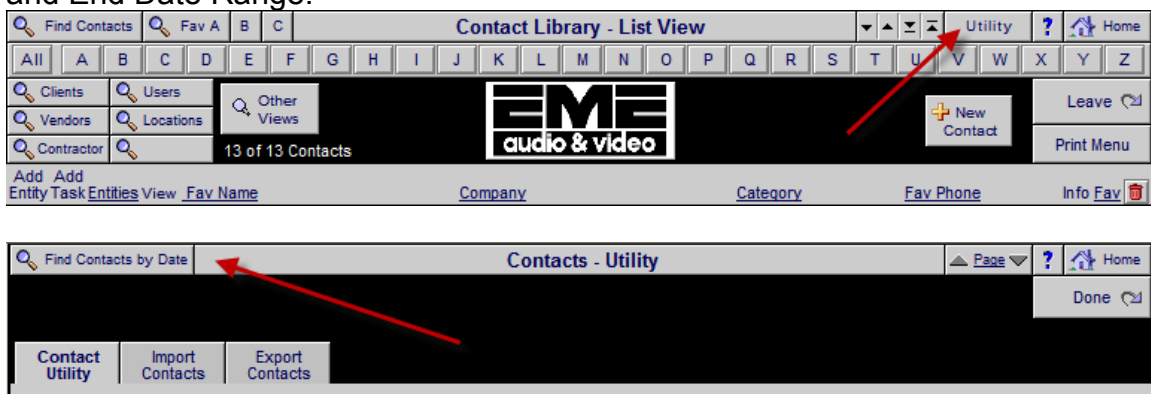


### Enhancement-Product Library: Alpha Finder Find Make Feature

The Alpha Finder Find Make feature has been added to these Product Library screens. Detail List, Utility Price List, Utility Value List, Utility No Value List, Pix Path, Inventory Control, Inventory Control 2.


### Enhancement-Contact/Utility: Find Contacts by Date Range

You can now find Contacts by Creation or Modification Date by entering the Start and End Date Range.





**Contacts - Find Contacts by Date** ?

Enter the Date Range and then click on Find  
You will then be asked if you want the Find to be based on the Contact Creation or Modification Date

Find  Cancel

**Date Range**


Start Date: 5/1/2010  to End Date: 5/31/2010 

### Enhancement-Product Library/Utility/Grooming: Clear Hidden Flag

If you find that your AlphaFinder is not finding all of your products and still hiding some of them you should run this Utility. It will not harm or alter your settings.

**Clean Hide Products Flag**

This Utility will clear the Hide Product flag of any odd characters other than 1 or blank so that the AlphaFinder works properly

 Hidden Utility

### Fix- Proposal/Proposal/Supplements: Parts & Wire Labor Supplements

If you change the Phase on Parts and Wire supplements on a Product in your Product Library, the Part and Wire would go into the correct Proposal Phase, but their Labor would go into their original default phase. This has been corrected so that the Parts and Wire and their Labor go into the same phase you chose.

**Additional Parts**

Only products classified as "part" can be added

Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Price
1	ea	Linn	Cirkus Kit	Main bearing upgrade for Sondek	1	\$645.00	\$645.00

**Additional Wire & Cable**

Only products classified as "wire" can be added

Class	Bulk Run	No	Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Price
Bulk	Home	<input type="checkbox"/>	150	M	Linn	K10 Cable	Loudspeaker cable	2	5.00	750.00

**Proposal - Labor Supplements**

Hayes Callahan

Home Entertainment System  
1292.1-1.100

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

Labor by Phase

**Labor Supplements**

Labor Total: 10:22:30 \$612.50

Zone - Area	Qty	Make : Model	View	Labor Type	Tax A B	Install Phases	Hourly Rate	Total Time with DOD (h:m:s)	Ext Sell
Atrium	1	Linn : 5101 Personal Handset	Q	Installation	T T	1,2,3	\$60.00	6:00:00	\$360.00
Atrium	1	Linn : 5101 Personal Handset	Q	Parts Labor	T T	1,2,3	\$50.00	1:00:00	\$50.00
Atrium	1	Linn : 5101 Personal Handset	Q	Wire Labor - Bulk	T T	1,2	\$60.00	3:07:30	\$187.50
Atrium	1	Linn : 5101 Personal Handset	Q	Wire Labor - Precut	T T	3	\$60.00	0:15:00	\$15.00

### Fix- Proposal/Project Screen: Supplement Lengths for Itemized Wire

Changing Wire Supplements from Itemized to not Itemized now properly changes all of the Bulk wire lengths to the Ave Wire Length times the Product Quantity.

Super View	Delete All Wire	Proposal - Wire Supplements					Wire Summary	Wire Detail	?	Home
Areas	Text	Products	Home Entertainment System 1292.1-1.100					Wire & Cable are not Itemized		Done
Labor	Parts	Wire	Tasks						270 feet per Home Run 75 feet per Room Run	Wire Manager
All Areas		Wire Supplements					Wire Total		\$3,933.00	
Wire assigned to		Class	Bulk Run	No	Wire	Wire & Cable	Tax	Install		
Zone - Area	Qty Make : Model	View <input type="checkbox"/> Sort	Type	Labor	Qty	Make : Model	A B	Phase	Unit Sell	Ext Sell
Atrium	2 Linn : 5101 Personal	Bulk Wire	Home		540 m	Linn : K10 Cable	T T	1	\$5.00	\$2,700.00
Atrium	2 Linn : 5101 Personal	Bulk Wire	Home		540 ft	Monster : 16/2 Spkr Wire	T T	1	\$0.45	\$243.00
Atrium	2 Linn : 5101 Personal	Bulk Wire	Room		150 ft	Monster : MVQUAD-B DB	T T	1	\$1.80	\$270.00
Atrium	2 Linn : 5101 Personal	Pre-Cut			6 pr	Linn : Black Interconnect	T T	1	\$120.00	\$720.00

### Fix- POS::Contact/Entity: Go to the correct POS Invoice

When you click on the desired POS Invoice you now will be directed to the correct POS Invoice.

X = Archived		POS			Remaining
View	Entity Kind	Number	Created	Total	Balance
Quotation	QT #7195	4/25/2007	\$1,675.25	\$1,675.25	
Quotation	QT #7197	5/5/2010	\$1,675.25	\$1,675.25	

### Fix- POS/Quotation: Convert Quote into an Invoice

When you convert a quotation into an Invoice there was a find routine that occasionally would leave you in the wrong Invoice. This find routine has been removed so you stay in the correct clients Invoice.

**SCPS Version 7.11v1**  
**Released: 3/24/2010**

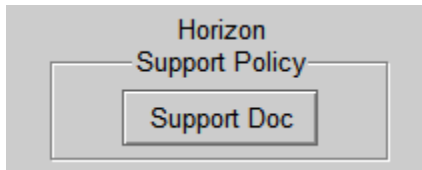
**Enhancement– Master Preferences/Horizon/Upgrade Guides**

SCPS Upgrade Guides for Single Users, Network Multi-Users and FileMaker Server have been rewritten for better clarity and are available on screen and in print on both the Master Prefs/Horizon and SCPS Upgrade Utility screens. Please note: the upgrade procedures have not been changed, but the documentation has been improved.



**Enhancement – Horizon Screen: Horizon Support Policy PDF**

Clicking this button on the Horizon screen will open the Horizon Support Policy document. This document outlines Horizon's Support Policy and Procedures.




**Enhancement – SCPS Subscription Renewal: Renew Later Navigation**

When you click on the Renew Later button you will be taken to the main SCPS log in screen instead of the Logo screen. This enables users to Log in properly.


Your subscription license will expire in 5 days. To renew your subscription, click on the New Code button. When you receive your new number, enter it click Activate. Your subscription will be renewed for another 90 days.



### Enhancement– Proposal/Client Screen: New Tax Layout

The organization of Tax fields and Location fields has been improved for better clarity.

**Select Tax**  Update

Tax Region	Menomonie	Tax A	5.000%
Location ID	name	Tax B	8.000%
Location #	1	Total Tax	13.000%

 Add New Tax Show Tax ☒ Yes ☐ No

Pick	Region	Location ID	Tax A	Total
	Zip Code	Location #	Tax B	Tax
	Eau Claire 54770		5.500%	5.500%
	Menomonie 54701	name 1	5.000% 8.000%	13.000%

### Enhancement– Proposal/Product Detail: Features Text

The Product Features text on a Proposal Product now shows up on all of the Proposal Reports. Any changes made to the features text on a Product in a Proposal will be reflected on the Proposal Reports and will not change the Features Text on that Product in the Product Library.



Client Mode ☐

### Proposal - Product Detail

Sandy Engandela  
 1290.1-1.100  
**Linn : Classik Speaker Package**  
 Audio : Speaker : 5.1 System

Areas	Products	Text			
Labor	Parts	Wire	Tasks		

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

Qty

Make

Model

SKU

Finish

Description

Features 

Designed specifically for the highly acclaimed CLASSIK Movie and CLASSIK Music Systems, the Linn CLASSIK Loudspeaker Package is a music and cinema loudspeaker solution. Five small, attractive and discrete CLASSIK UNIK loudspeakers provide superb pitch accurate dynamic sound suitable for front, centre and rear channels. The compact CLASSIK AFEKT bass reinforcement

Group

[Change Group](#)

Product Classification

Primary Install Phase

Purchase

Vendor

Do not Discount

[Show Product as Option](#)

### Enhancement – Proposal/Wire Supplement: Sort Order

A new sort order for the Wire Supplements organizes the wire supplements in groups of Bulk Home Run, Bulk Room Run and Pre Cut Cables which makes them easier to understand.

### Enhancement– Proposal/Pure Supplements: Parts & Wire Labor

Adding Pure Parts and Wire Pure Supplements has been improved for increased reliability and speed.

#### Pure Supplement Parts in Atrium : Audio Discipline

+

[Add Part](#)

Qty	Make	Model	Phase	Orig disp	Unit Sell	Ext Sell	
<input style="width: 50px;" type="text" value="1"/>	ea Linn	Aktiv Modules			<input style="width: 80px;" type="text" value="255.00"/>	255.00	
Audio	Stereo or twin mono	Active crossover	<input style="width: 50px;" type="text" value="3"/>		Supplement		

#### Pure Supplement Wire in Atrium : Discipline

+

[Add Wire](#)

Qty	Make	Model	Phase	Unit Sell	Ext Sell	
<input style="width: 50px;" type="text" value="150"/>	ft Linn	Bulk Analog interconnect		<input style="width: 80px;" type="text" value="4.25"/>	637.50	
Bulk	Home	Analog interconnect	<input style="width: 50px;" type="text" value="1"/>		Supplement	

## Enhancement– Proposal/Product Detail/Parts Supplement: Sort

The Parts Portal is now sorted by Make & Model for better clarity.

**Proposal - Product Detail - Parts Supplements** 1 of 1 ? Home

Hayes Callahan  
1294.1-1.100  
Linn : 5101 Personal Handset  
Audio : Multi-room : Keypad

Areas: Products Text  
Labor Parts Wire Tasks

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

Parts Make Model Add Only products classified as "Parts" can be added

Qty	Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell
1 ea	Linn	Cirkus Kit	Main bearing upgrade for Sondek	2	387.00	645.00	645.00
2 ea	Linn	Knekt RCU Install Kit	Install kit (contents listed below)	3	125.00	210.00	420.00
2 ea	Linn	Knekt RCU Metalwork	Back box	2	12.00	20.00	40.00

## Enhancement – Proposal & Project/Pricing/Labor Rates: Display

The Labor Rates screen in Proposals and Projects now displays the rates that have been selected for that Proposal/Project. In addition the Parts and Wire default time is displayed as well.

## Enhancement – Proposal or Pending CO Pricing/Labor: Auto Update

When leaving this screen the labor rates are automatically updated on all of the labor records in your Proposal or Pending Change Order so that you no longer have to update them manually. This eliminates the possibility of changing the rates and not updating them, which causes some labor records to be different than others.

**Master Project - Labor Rates - View Only** ? Done

Hayes Callahan  
Home Entertainment System  
1292.1-1.100

Pricing Labor Rates Commissions  
Tax Summary Product Tax Fees Tax

**Hourly Labor Rate Selector**

Blank = Default 1

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

Labor Categories	Project Labor Rates	
	Cost	Sell
1 - Installation	\$30.00	\$60.00
2 - Programming	\$40.00	\$80.00
3 - Training	\$50.00	\$100.00
4 - Parts Labor	\$30.00	\$50.00
5 - Wire Labor - Bulk	\$35.00	\$60.00
6 - Wire Labor - Precut	\$40.00	\$60.00

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

**Labor Time**

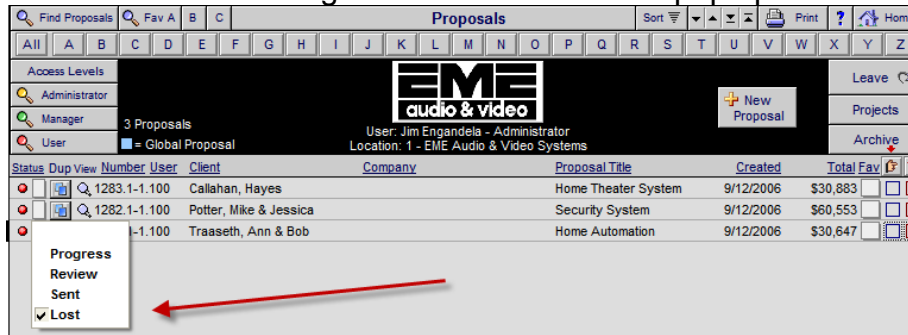
Parts Time per item 0:15:00

Bulk Wire Time per foot 0:00:30

Pre Cut Wire Time per item 0:05:00

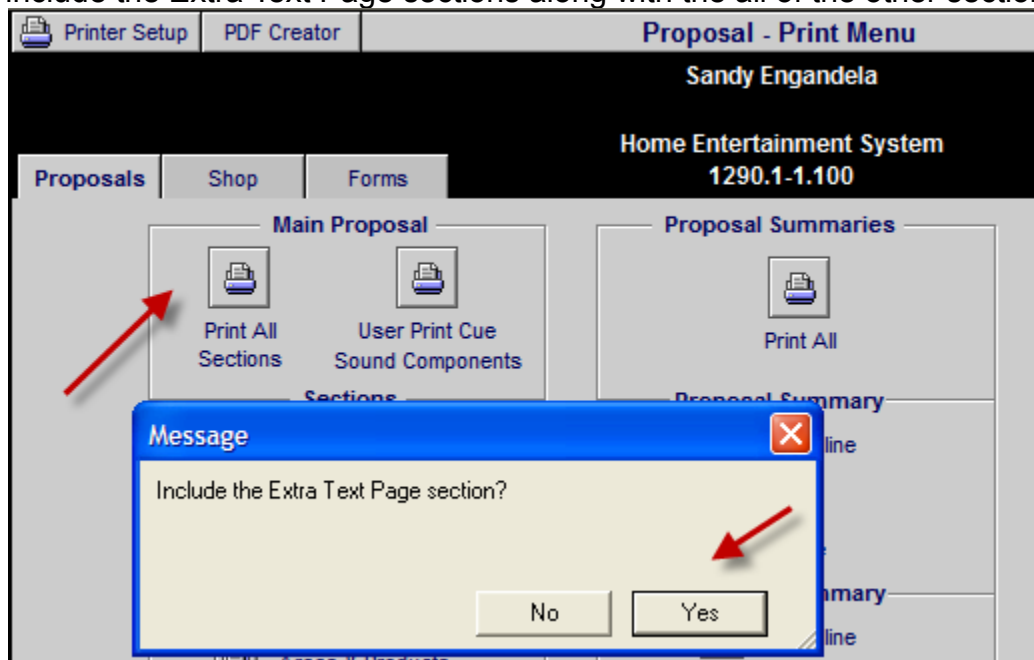
### Enhancement – Proposal List: Lost Status

A new “Lost” status flag has been added to the pop up list.



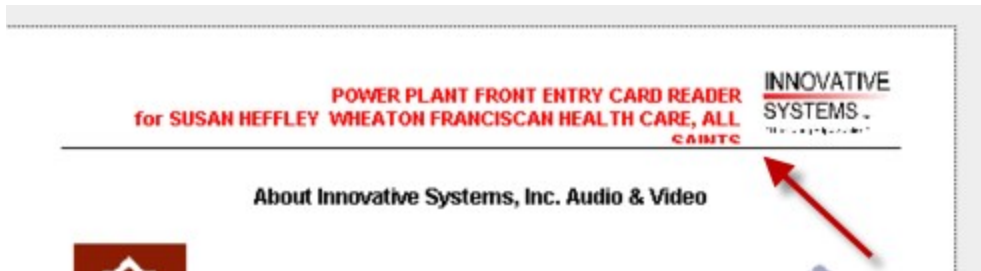
### Enhancement– Proposal/Print Menu: Print Extra Page Option

When Printing the Print All Sections button you now have an option to include or not include the Extra Text Page sections along with the all of the other sections.



### Enhancement– Proposal/Print Menu: All report headers

All Proposal report headers have been expanded to a full 3 lines so that long Client Names and Proposal Titles that wrap to 3 lines will not have the 3<sup>rd</sup> line cut off.



### Enhancement – Project/Sales Invoice: Labor Population

Improve Labor Make/Model/Description population on the Invoice.

Make = Labor, Model = Labor Type, Description = Phase and hours and rate

### Enhancement – Project/Sales Invoice: Item Sort Order

Items on the Printed Sales Invoice are now sorted by Product, Parts, Wire, Labor and then Fees so that the invoice is easier to read.

Kind	Qty	Make	Model	Description	Serial Numbers/Notes	Unit Sell	Extended Sell
lb	1 ea	Labor	Installation	Phase 2 - 1:00:00 hms @ \$60.00		60.00	60.00
lb	1 ea	Labor	Parts Labor	Phase 2 - 0:30:00 hms @ \$50.00		25.00	25.00
lb	1 ea	Labor	Parts Labor	Phase 3 - 1:30:00 hms @ \$50.00		75.00	75.00
lb	1 ea	Labor	Programming	Phase 3 - 2:00:00 hms @ \$80.00		160.00	160.00
lb	1 ea	Labor	Training	Phase 2 - 10:00:00 hms @ \$100.00		1,000.00	1,000.00
lb	1 ea	Labor	Wire Labor - Bulk	Phase 1 - 6:15:00 hms @ \$60.00		375.00	375.00
lb	1 ea	Labor	Wire Labor - Precut	Phase 3 - 0:30:00 hms @ \$60.00		30.00	30.00

### Enhancement– Project/PO: Option to hide client info on PO

This option now enables you to hide all Client/Project info from a Purchase Order.

☒ Setup ☐ Delete PO **Purchase Order Detail Not Posted**

☒ Do not show Client/Project info on PO **Vendor Address** **Ship To Address** **Show/Hide**

**PO Number** 1079 - 1285.1-1.100 **EME Audio & Video Systems**  
**User PO #**  **100 Purchasing Lane**  
**PO Date** 2/22/2010 **Purchasing City, WI 567937**  
**Posted Date**  **Auto R**  
**PO Notes**  **1285.1-1.100** **All PC**

## Enhancement – RCMS/Project/Client: Tax Location Pump Up

The RCMS Tax Jurisdiction Location number is now comes from the RCMS contact query and this Location number is then used during the RCMS pump up to assign the proper tax to the Project Invoice that is staged in RCMS. If the Tax flag is turned OFF then this Tax Location number will not be used during the RCMS pump up.

RCMS - Client Info

Client: Rick Schwambx  
Home Theater System  
1283.1-1.100

1 - Enter Phones & click Query  
Phone: (414)425-0166  
Query

2 - Click on the RCMS Client  
SCHWAMB, RICK  
4970 S GUERIN PASS  
NEW BERLIN WI 67  
53151-7551 SCH49701

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: Rick  
Last: Schwambx  
Company:  
Label: 4970 S Guerin Pass  
City: New Berlin  
State: WI Zip: 53151-7551  
Copy 1-2  
City:  
State: Zip:  
Home Phone: (414)425-0166  
Work Phone:  
Mobile:  
Fax:  
Other:  
Radio ID:  
eMail Address:

4 - Selected Tax  
Tax: Yes No New Tax  
Location: Eau Claire Jur # 67 Zip 54770  
Tax A 5.500%  
Tax B 5.500%  
Total Tax 5.500%

## Enhancement– Product Library: All List Screens AlphaFinder Pick Make & Find Hidden Option

By clicking the Pick Make and Show Hidden check boxes, you can now modify the Alpha-Finder in the Product Library to show;

- 1.All products for a selected character, with only regular products.
- 2.All products for a selected character, including Hidden products.
- 3.All Makes for a selected character, with only regular products.

Product Library - Line List

Find Products Fav A B C ☒ Pick Make ☒ Show Hidden

103,106 Items  
103,106 Total

Displn	Cat	Type	Class View	Make	Model	SKU	Description	Finish	Notes	Sell Price	Auto Tag
Audio	Multi	Keypad	<input checked="" type="radio"/>	Linn	5101	Personal Handset	Universal learning	Black		390.00 ea	<input type="checkbox"/>
Audio	Ampli	Surround Process	<input checked="" type="radio"/>	Linn	5103	System Controller	Linn 5103 inc DTS, no			5,500.00 ea	<input type="checkbox"/>
Audio	Ampli	Multi-channel	<input checked="" type="radio"/>	Linn	5125		Five channel power	Silver		2,750.00 ea	<input type="checkbox"/>
Audio	Sourc	Phono	<input checked="" type="radio"/>	Linn		Akito	Pick up tonearm	Black		1,100.00 ea	<input type="checkbox"/>
Audio	Sourc	CD Player	<input checked="" type="radio"/>	Linn		Classik Music-B	Integrated CD	Blue		1,550.00 ea	<input type="checkbox"/>

When the Pick Makes is checked you will go to the Pick Makes screen for that character. When you click on a Make you will find all of the Regular products for that Make, unless you have Show Hidden checked. In that case you will find all of the Regular and Hidden products for that Make.

If you do not see all of the Makes in the list, please click on the Update Make List. This normally will not need to be done unless you add new Makes to the Product Library. This Update Make List utility is also available from the Utility/Update Utility screen.

**Product Library - AlphaFind by Make = B**

Update Make List Cancel

*If you do not see all Makes, click the "Update Make List" button. This needs to be done after adding a new Make*

Pick Make

- B & A MANUFACTURING
- B.E.S.
- B.G. TECHNOLOGIES
- B-LINE
- Backboxx
- Baudcom
- BAUDCOM COMMUNICATIONS, INC
- BCD INC
- BELDEN WIRE&CABLE
- BELKIN INC.
- BENQ AMERICA CORP.
- BETTER WAY PRODUCTS

### Enhancement – Product Library/Inventory Control: New Totals screen

Calculating the Inventory Totals can take a few moments so they have been moved to another screen for viewing when necessary.

Find Products		Fav A	B	C	Product Library - Inventory Control																	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				
Show Products		Inventory on Hand is determined by Physical Count + Project PO Receiving Qty - Invoicing Qty																							Done					
Part		103106 of 6942 Items																							Show Inventory Values \$		Show Qty On Hand		Adjust Qty On Hand	
Bulk																														
PreCut																														
		Show Regular, Hidden, All Products																												

Product Library - Inventory Values			Print	Home
Inventory on Hand is determined by Physical Count + Project PO Receiving Qty - Invoicing Qty			Done	
103106 of 6942 Items				
	Optimum Level	To Order	Inventory on Hand	
	\$1,695,174.60	\$34,023.49	\$1,399,193.23	

### Enhancement – Product Library/Product Detail: Discontinued Item

A new flag has been added to indicate if a product is discontinued. This flag appears in both the Product Library Detail and Proposal Product Detail screens. A report of all discontinued products can be printed from the Product Library/Print

Menu. (see below). The Price List Utility screen also has a Find Discontinued Item button that will show these items.

Product Group

☒ Product Classification

Primary Install Phase

Favorite ☐ Fee SKU ☐

Proposal Sort  Phantom Product ☐

Issue Staple Up Card ☐ Tax A  + Tax B

Do not Hide ☐ ? Hide this Product ☐

Do not Delete ☐ New Product ☐

Do not Discount ☐ Discontinued Product ☐

Printer Setup | **Product Library - Print Menu** | ? | Home

2 of 6942 Items

Print/Preview Reports

Product List	Confidential Product - Detail List	Product Back Panels
Manufacturer (Make) List	Confidential Product - LineList	Product Supplements
Discontinued Product List	Confidential Product - Labor List	Product Cue Notes
Confidential Product Detail		

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

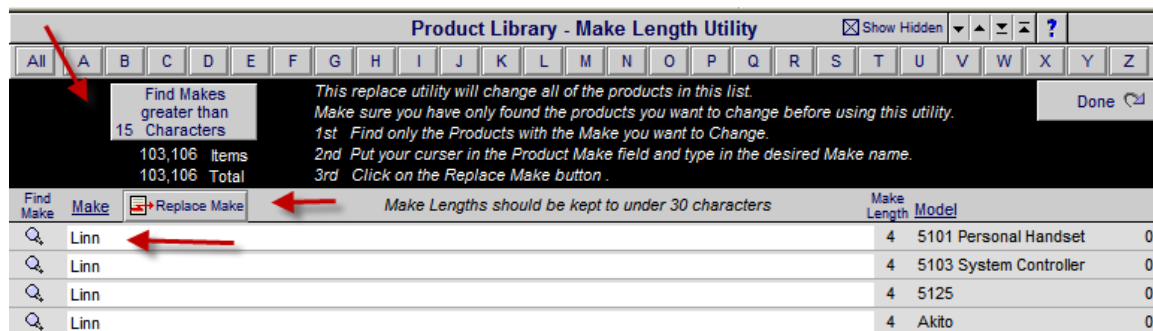
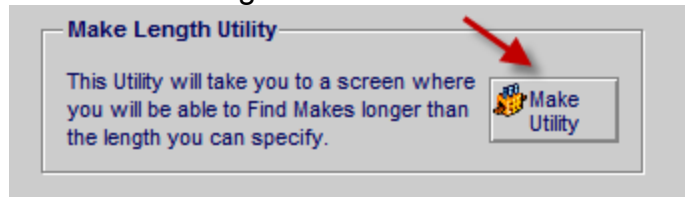
Show Products | Sort by Date or by User | Discontinued Items | Done

Part | Phantom | Bulk | PreCut | Price List | Group List | Value List | No Values | Pix Path | 2 Items | 103,106 Total

Dept	Cat	Type	Status	View	Class	Make	Model	Description	Discontinued Product	Finish	Fav	Hide
Equip						A.E.S. : 3601052		GRILLE ASSMBLY AES 30F	<input checked="" type="checkbox"/>			
Created: 1/28/2010						List		Adjustment Type	%	Loaded Price		
Modified: 3/2/2010						Unit	ea	Sell	\$14.00			
By: Jim Engandela						Minimum Sell		Min GP	%			
Key: 35102						Cost	\$8.29					
										Sell	\$14.00	40.8% GP
										Cost	\$8.29	
Equip						B & A MANUFACTURING : BH-1224		1/2" X 24" BELLHANGER W/3/8	<input checked="" type="checkbox"/>			
Created: 1/28/2010						List		Adjustment Type	%	Loaded Price		
Modified: 3/2/2010						Unit	ea	Sell	\$30.00			
By: Jim Engandela						Minimum Sell		Min GP	%			
Key: 37568						Cost	\$17.50					
										Sell	\$30.00	41.7% GP
										Cost	\$17.50	

### Enhancement– Product Library: Utility/Grooming:Make Length Utility

This utility enables you to Find all of the products in your Library that have a Make Length greater than the length you specify. This enables you to change the Make name on those products that have a length greater than the standard 30 character length.



### Enhancement– Product Library: Improve Sort Speed on List screens

Using a calculated Make/Model field with trimmed to 10 character values speeds up sort functions in all Product Library List screens.

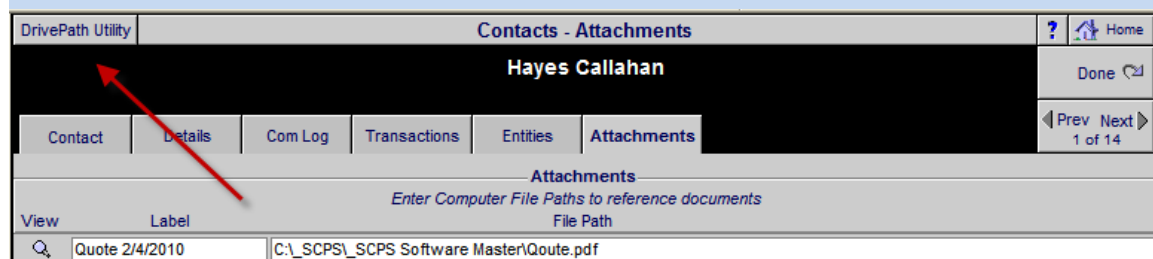
### Enhancement– Product Library/Product Detail/PDF's & Contacts/Attachments:

The DrivePath Utility will give you the computer path to whatever folder you place it in.

Download the DrivePath utility Zip file, to your computer.

After Expanding the zip file, place the Drive Path.html file into any folder and click on it.

You can copy the Path displayed in your web browser and paste it into SCPS.







## Enhancement – POS/PO/Open, Closed & Archived PO Navigation

Navigating to the PO Detail screen from the PO List screen, now returns you to the PO List you came from when you click on the Done button. These Detail and List screens are now labeled as Open, Closed or Archived.

View Invoice	Company	Date	Reference	Buyer	P.O. Status	P.O. Amount	Archive
PO #7186	Tri-Ed Mississauga Location	9/28/2005	Pryde	Tina	Closed	102.00	<input type="checkbox"/>
PO #7180	Tri-Ed Mississauga Location	9/23/2005	Swadron	Doug Gilpin	Closed	626.35	<input type="checkbox"/>
PO #7176	Precor	9/22/2005	Lipson	Chad Trude	Closed	104.00	<input type="checkbox"/>

## Enhancement – POS/Quotations and Sales Invoices: Hide Labor Option

You now have the option to Print a POS Quotation or Sales Invoice with or without the Labor Detail at the bottom of the printed invoice.

**Quotation QT #7190**

Label Job Site ☐ Show ☐ Hide

Laura & Robbie Pryde  
22 Hedgewood Road  
North York, ON M2L 1L5

9/29/2005

Ship VIA:  Payment:  Terms:  Reference #:  Sales Rep:  Quotation Title:

Install (h.m.s) Unit Price Ext Price Tax A B

b nr: Synergy : LABOUR : Pre-wiring labour				75.00	450.00
350 ft	Provo : NEW Z422 Per Foot : Quad Alarm Wire			0.16	57.68
1 ea	Vantage : CIS : Contact closure input station 10 inputs			560.84	560.84
<b>Estimated Services</b>				Line Items:	14,823.63
Equipment Installation:	Hours	Rate	Amount	Labor:	0.00
	0:00:00	90.00		Other:	
				Subtotal:	14,823.63
				Tax:	0.00
				Freight:	
				Total:	14,823.63
<b>Total Labor: 0:00:00 Hrs</b>					
<b>Other Charges</b>				Amount	

350 ft	Provo : NEW Z422 Per Foot : Quad Alarm Wire	0.16	57.68
1 ea	Vantage : CIS : Contact closure input station 10 inputs	560.84	560.84
		Line Items:	14,823.63
		Labor:	0.00
		Other:	
		Subtotal:	14,823.63
		Tax:	0.00
		Freight:	
		Total:	14,823.63
<b>Other Charges</b>		Amount	

## Fix – Proposal/Areas & Products: Rename Area

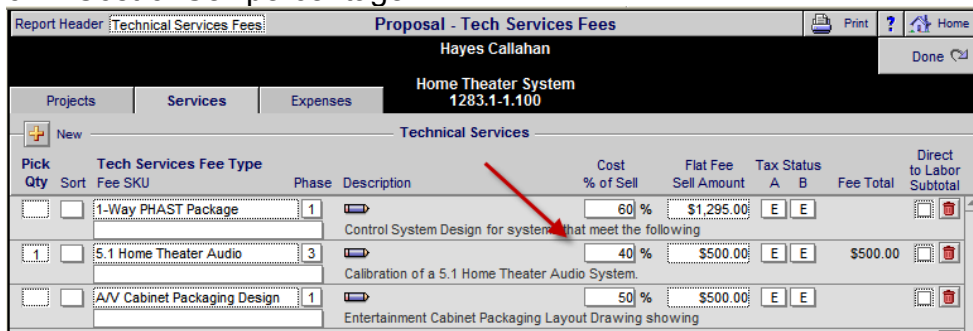
Renaming an Area in a Proposal was causing picking products in that renamed area to kick you out of the proposal by removing the mLine key on that product. This has been corrected.

### Fix – Proposal/Wire Bulk Wire Supplement: Adding related Labor

Adding Bulk Wire Supplements to a Proposal was not adding associated Labor for that wire. This has been fixed.

### Fix– Proposal/Fees/Service Fees: Cost of Sell Percentage

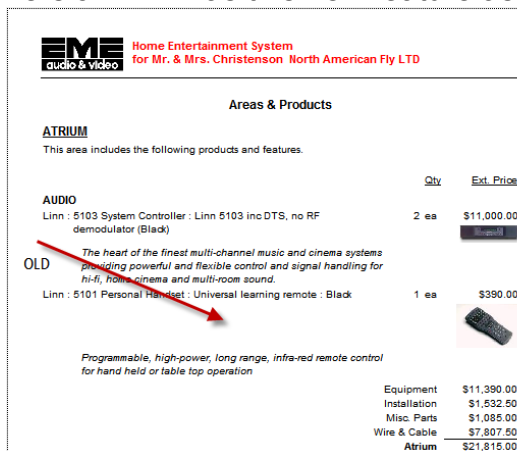
This field was not attached to the Portal Relationship, so changing one Fee Percentage changed all Fees. This has been corrected so each fee can have its own Cost of Sell percentage.





Pick	Qty	Sort	Tech Services Fee Type	Phase	Description	Cost % of Sell	Flat Fee Sell Amount	Tax Status A	Tax Status B	Fee Total	Direct to Labor Subtotal
			1-Way PHAST Package	1	Control System Design for systems that meet the following	60 %	\$1,295.00	E	E		
1			5.1 Home Theater Audio	3	Calibration of a 5.1 Home Theater Audio System.	40 %	\$500.00	E	E	\$500.00	
			AV Cabinet Packaging Design	1	Entertainment Cabinet Packaging Layout Drawing showing	50 %	\$500.00	E	E		

### Fix– Proposal/Print Menu: All Reports with Pictures

The blank space between Product descriptions and features text has now been removed so that if a product has a picture there will be no blank space. This makes the proposal look cleaner and easier to understand. The Reports file version 7.11 has this new feature as well.



Areas & Products	
ATRIVM	
This area includes the following products and features.	
	Qty Ext. Price
<b>AUDIO</b>	
Linn : 5103 System Controller : Linn 5103 inc DTS, no RF demodulator (Black)	2 ea \$11,000.00
<i>The heart of the finest multi-channel music and cinema systems providing powerful and flexible control and signal handling for hi-fi, home cinema and multi-room sound.</i>	
Linn : 5101 Personal Remotet : Universal learning remote : Black	1 ea \$390.00
<i>Programmable, high-power, long range, infra-red remote control for hand held or table top operation</i>	
Equipment	\$11,390.00
Installation	\$1,632.50
Misc. Parts	\$1,085.00
Wire & Cable	\$7,807.50
<b>Atrium</b>	<b>\$21,815.00</b>


Home Entertainment System for Mr. & Mrs. Christenson North American Fly LTD		EME Audio & Video
Areas & Products		
<b>ATRIUM</b> This area includes the following products and features.		
		Qty    Ext. Price
<b>AUDIO</b>		
Linn : 5103 System Controller : Linn 5103 inc DTS, no RF demodulator (Black)		2 ea    \$11,000.00
<i>The heart of the finest multi-channel music and cinema systems providing powerful and flexible control and signal handling for hi-fi, home cinema and multi-room sound.</i>		
Linn : 5101 Personal Handset : Universal learning remote : Black		1 ea    \$390.00
<i>Programmable, high-power, long range, infra-red remote control for hand held or table top operation</i>		
NEW		
Equipment		\$11,390.00
Installation		\$1,532.50
Misc. Parts		\$1,085.00
Wire & Cable		\$7,807.50
<b>ATRIUM</b>		<b>\$21,815.00</b>

### Fix– Project/Change Orders: Changing Product Qty, Changes Parts

Changing the Quantity of a Product in a Change Order now properly changes the Quantity of the Parts supplements for that Product.

### Fix – Project/Utility: Convert Project to a Proposal

Converting a Project back into a Proposal now correctly reposts the Change Order totals when the proposal is converted (sold) back into a Project. If you notice that your old projects have incorrect totals (those that have been converted back and forth may have wrong totals) then simply run this conversion process again on the Project and the totals will be corrected.



**Convert this Project back into a Proposal**

You might want to consider simply duplicating this Project, which will turn it into a duplicated Proposal.

### Fix– Project/Utility/Toggle Project: Disconnect CO's Message

The message that says CO's are Disconnected from the Project is now stored in MainPrefs instead of Globally so that it is specific to each Project.

### Fix – Project/Sales Invoice: Returning to Parts screen

If you create and invoice and then delete it when you return to the Invoice Module the Parts screen was blank. This has been corrected and the parts screen now shows the Project Parts correctly.

### Fix – Project/Sales Invoice: Separate A and B tax subtotals

Tax A and B tax was being combined together. They are now separate. If you do not have any B tax then B will be empty. We also moved all of the bottom totals up to the top of the invoice to make it easier to monitor as you build your invoice.

Setup		Sales Invoice Detail <b>Not Posted</b>		Prev/Next ?	
Delete SI		Project Contact		Bill To Contact <input type="checkbox"/> Use Alt Billing Contact <input type="button" value="Post SI"/>	
<b>SI Number</b> 3013 - 1290.1-1.100 <b>SI Date</b> 3/22/2010 <b>Posted Date</b> <b>Export Date</b>		<b>Hayes Callahan</b> 567 58TH Street Oakland, CA 94607		<b>Hayes Callahan</b> 567 58TH Street Oakland, CA 94607	
				<input type="button" value="Done"/> <input type="button" value="Print &amp; Post SI"/> <input type="button" value="View"/>	
<b>Date</b> <input type="text"/> <b>Special Notes</b> <input type="text"/> <b>Payments Total</b> <input type="text"/> <b>Amount Due</b> <input type="text"/>		<b>Payment Type</b> <input type="text"/> <b>Check Number</b> <input type="text"/> <input type="button" value="Post Payment to SCPS Payment Log &gt;"/> <input type="button" value="Deposit Pmt 1"/>		<b>Tax A</b> \$5.00 <b>Tax B</b> \$8.00 <b>SubTotal</b> 100.00 <b>Tax</b> 13.00 <b>Invoice Total</b> 113.00	
<b>Kind</b>	<b>Qty</b>	<b>Make</b>	<b>Model</b>	<b>Description</b>	<b>Serial Numbers/Notes</b>
fe	1	Fee	Item	Documentation	
					<b>Unit Sell</b> 100.00 <b>Extended Sell</b> 100.00

### Fix – Product Library: Bad relationship was deleting products

Delete Related Record removed from the copyMake relationship to stop the accidental deletion of products.

### Fix – Master Project/Utility: Disconnect CO Products-Indicator

The indicator the lets you know that Change Order Products are disconnected from this Master Project so that you see only the original proposal products has not been moved to the Main Pref file so that it is specific to each Master Project.

### Fix – Master Tracker/Print Menu: Print All prints all pages

The print all button only printed 3 pages of these reports. It now prints all pages correctly.

### Fix – POS/PO/Done List: Archived PO's Removed from list

POS Purchase Orders that are Done and have been Archived are now permanently removed from the Done list and will stay in the Archive list.

### Fix – POS/Quotations & Invoices: Picking Products returns to Products










When you pick a product in a POS Quotation from the Product Library you are now returned to that Product (Make) when you pick the next Product, instead of to a list of all Products.









**SCPS Version 7.10v2**  
**Released: 2/8/2010**

**Fix- Proposal & Change Order/Areas & Products: Portal Fix**

The Product portal on the Areas & Products screen now behaves properly by entering the correct product when you click on the Product View button and Deleting only the checked product when clicking on the delete button.

Also when adding a Pure Parts or Wire Supplement, the supplement is properly attached to the Area it is assigned to and the supplement is properly displayed in the Parts or Wire Portal after it is added.

Products in the Zone 1 - Home Theater						
Add  Products		Add  Sets		Add/View  Pure Supplements		
Discipline	View	Qty	Sort	Make : Model	Unit Sell	Tag
Cat : Type				<input type="checkbox"/> Sort	Extended Sell	 
Audio		1 ea	Linn : 5125		\$2,750.00	<input type="checkbox"/>
Amplifier : Multi-channel		<input type="text" value="m"/>	Five channel power amplifier		\$2,750.00	
Audio		5 pr	Linn : Katan		\$995.00	<input type="checkbox"/>
Speaker : Bookshelf		<input type="text" value="m"/>	Bookshelf loudspeakers: pair		\$4,975.00	
Video		1 ea	Runco : CL-610		\$7,995.00	<input type="checkbox"/>
Display : DLP Video Projec		<input type="text" value="m"/>	DLP Projector		\$7,995.00	
Video		1 ea	Sony : DVP-NS999ES		\$1,099.95	<input type="checkbox"/>
Source : DVD Player		<input type="text" value="m"/>	Progressive Scan DVD Player		\$1,099.95	

Pure Labor	Pure Parts	Pure Wire
Disciplines in Zone 1 - Home Theater		
Refresh 		
Pick Discipline	Delete	
 Audio	Supplemental : Items	
 Video	Supplemental : Items	
 Wire & Cable	Supplemental : Items	
Pure Supplement Parts in Zone 1 - Home Theater : Audio Discipline		
Parts Make Model  Add Part		
Qty	Make	Model
1 pr	Linn	Wall Box
Audio	Pair of wall boxes for Sekrit in-wall	3
		Supplement
1 ea	Linn	IR Repeater
Audio	Infra-red extension for RCU or main	3
		Supplement

**SCPS Version 7.10**  
Released: 2/3/2010

### Enhancement – Master Prefs/Horizon/Module Access

All SCPS modules can now be turned on/off by Horizon for those users that do not want access to certain modules. The Master Prefs/Horizon/Module Access screen shows which modules have their access turned off. Access can only be turned on/off by Horizon Software.

### Enhancement – Proposal/Area & Product: Sort by Area or Product

You can now click on the Make:Model Sort checkbox and change the sort Order of the products in the right portal from Department:Make:Model to Make:Model.

Super View		Sum View		Auto Build		Proposal - Areas & Products					Labor Total		Grand Total		Home										
						Mike & Jessica Potter					Equipment		\$22,909.95		Done										
Areas		Products		Text							Installation		\$1,220.83												
											Misc. Parts		\$200.00												
Labor		Parts		Wire		Tasks							Wire & Cable		\$3,041.20										
						Security System					Area Total		\$27,371.98		Labor Time										
						1282.1-1.100									19:05:00										
Loc		Zone		Areas				No Prompt		Products in the Zone 1 - Home Theater															
				Pick or Type Area		New		Area		Add		Products		Add		Sets		Add/View		Pure Supplements					
Location		Zone		Sort		Area		Rename		Dup		Discipline		View		Qty		Sort		Make : Model		Unit Sell		Tag	
Cat : Type																				Extended Sell					
		1		m		Basement						Automation				1 ea				Linn : 5101 Personal Handset		\$390.00			
		1		m		Home Theater						Remote : Handheld Remote				m				Universal learning remote		\$390.00			
												Audio				1 ea				Linn : 5125		\$2,750.00			
												Amplifier : Multi-channel				m				Five channel power amplifier		\$2,750.00			
												Audio				5 pr				Linn : Katan		\$995.00			
												Speaker : Bookshelf				m				Bookshelf loudspeakers: pair		\$4,975.00			
												Automation				1 ea				Linn : Knekt RCU		\$750.00			
												Control : Keypad				m				Knekt room control unit		\$750.00			
												Audio				1 ea				Linn : Melodik		\$4,950.00			
												Speaker : Powered Subwoofe				m				Aktive isobarik bass extension		\$4,950.00			
												Video				1 ea				Runco : CL-610		\$7,995.00			
												Display : DLP Video Projec				m				DLP Projector		\$7,995.00			
												Video				1 ea				Sony : DVP-NS999ES		\$1,099.95			
												Source : DVD Player				m				Progressive Scan DVD Player		\$1,099.95			

### Enhancement – Proposal/Product View: Do not show Supplements

When you click on the Area or Discipline...only Products will show up in the list (for the selected Area or Discipline) and not any Pure Supplements. This enables you to focus only on actual Products and not on Supplements on this screen.

Super View		Sum View		Show All		Proposal - Products				All 14 Products				Home							
Areas		Products		Text		Mike & Jessica Potter				Adjust Selected Prices		Update All Products		Done							
Labor		Parts		Wire		Tasks		14 Products		Security System 1282.1-1.100		Client Mode <input type="checkbox"/>		Replace Selected Products		Delete All Options		Product Total \$45,819.90			
View Detail 		Replace Product 		Change Group 		Zone - Area Discipline Description		Make Category		Phase Shop Notes		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	
				1 ea		1 - Basement		Linn				5125		\$80.00				\$2,750.00		\$2,750.00	
						Audio		Amplifier				Multi-channel		\$0.00				\$2,750.00		\$2,830.00	
						Five channel power amplifier (Black)				3		Product		\$480.00		\$1,650.00		40.0%			
				5 pr		1 - Basement		Linn				Katan		\$287.50				\$995.00		\$4,975.00	
						Audio		Speaker				Bookshelf		\$0.00				\$995.00		\$5,262.50	
						Bookshelf loudspeakers: pair				3		Product		\$205.50		\$597.00		40.0%			
				1 ea		1 - Basement		Linn				Melodik		\$130.00				\$4,950.00		\$4,950.00	
						Audio		Speaker				Powered Subwoofer		\$95.00				\$4,950.00		\$5,080.00	
						Aktive isobarik bass extension				3		Product		\$318.75		\$2,970.00		40.0%			

## Enhancement – Proposal/Products: Shop Notes Pop Up window

You can now edit the Internal Shop Notes on each product using the Pop Up window when you click on the Shop Notes field.

The screenshot shows the 'Proposal - Products' window for 'Mike & Jessica Potter' with a 'Security System' proposal. A red arrow points from the 'Shop Notes' field in the product list to a 'Shop Notes: Expand Window' pop-up. The pop-up contains the text 'These are internal shop notes about this product' and an 'Append Shop Notes' button. A second red arrow points from the 'Append Shop Notes' button to a text input field containing the same text. The background table lists products with columns for Zone, Area, Discipline, Description, Make, Category, Model, Phase, Type, Class, Product Labor, Unit List, Adjusted Sell, and Extended Sell.

Zone	Area	Discipline	Description	Make	Category	Model	Phase	Type	Class	Product Labor	Unit List	Adjusted Sell	Extended Sell
1	Basement	Audio	Five channel power amplifier (Black)	Linn	Amplifier	5125	3	Multi-channel	Product	\$80.00	\$2,750.00	\$2,750.00	\$2,750.00
1	Basement	Audio	Bookshelf loudspeakers: pair	Linn	Speaker					\$0.00	\$2,750.00	\$2,750.00	\$2,830.00
1	Basement	Audio	Aktive isobarik bass extension	Linn	Speaker					\$480.00	\$1,650.00	\$1,650.00	\$4,975.00
1	Basement	Video	DLP Projector DLP Projector	Runco	Display								\$5,262.50
1	Basement	Video	Progressive Scan DVD Player	Sony	Source								\$4,950.00
1	Basement	Video											\$5,080.00
1	Basement	Video											\$7,995.00
1	Basement	Video											\$8,105.00
1	Basement	Video											\$1,099.95
1	Basement	Video											\$1,134.95

## Enhancement – Proposal Pure Labor Supplement: Labor Notes

You can now add and edit the Internal Labor Notes on each product using the Pop Up window when you click on the Shop Notes field.

The screenshot shows the 'Add Pure Labor Supplement - Type & Time' window for 'Hayes Callahan' with a 'Home Entertainment System' proposal. A red arrow points from the 'Labor Note' field to a text input field containing the text 'This training includes usage of your master remote control.' The background table lists labor types with columns for Labor Type, Labor Rate, Phase 1, Phase 2, Phase 3, and Totals.

Labor Type	Labor Rate	Phase 1	Phase 2	Phase 3	Totals
3 - Training	\$100.00		3:30:00		3:30:00



Pure Labor | Pure Parts | Pure Wire

Add Discipline      Disciplines in Atrium      Refresh

Pick Discipline      Supplemental : Items      Delete

Audio

**Labor Notes: Expand Window**

This training includes usage of your master remote control.

Append Labor Notes

OK

Add Labor      Labor in Atrium : Audio Discipline

Labor Type	Notes	Hrly Rate	Phase 1	Phase 2	Phase 3	Total (h:m:s)	Delete
Installation	<input type="checkbox"/>	\$60.00	3:30:00			= 3:30:00	
Programming	<input type="checkbox"/>	\$80.00		4:00:00		= 4:00:00	
Training	<input checked="" type="checkbox"/>	\$100.00		3:30:00		= 3:30:00	
Total Labor Time:			3:30:00	7:30:00		= 11:00:00	
Total Labor Time with DOD:			3:30:00	7:30:00	0:00:00	= 11:00:00	
Total Labor Sell:			\$210.00	\$670.00		= \$880.00	

### Enhancement – Project Manager/PO's, WO's, SI: No record trap

If you do not have any Project PO's, WO's or SI's you will be returned to this screen instead of to the blank Horizon Dev screen, which is as it should be.

**Product Managers**

Purchase Orders

Work Orders

Sales Invoices

### Enhancement – Project/Work Order: Redesign header with 3 Installers

The 3 Installers and Install Times on Project/Work Orders is now reflected on the Printed Work Order report.

Installed by:	MR	LB	SR
Install Time:	15:00:00	3:30:00	2:30:00
Total Time:	21:00:00 hrs:min		

<b>Address 1:</b> Mike & Jessica Potter 567 58TH Street Oakland, CA 94607	<b>WO Installer</b> Sales Specialist Jim Engandela	<b>Project Manager</b> Joel Roberts <b>Project Engineer</b> Jon Oster
<b>Address 2:</b> Mike & Jessica Potter	<b>Installation</b> Scheduled Date: _____ Date Installed: _____ Credit Release: _____ Projected Install Time: 2:40:00 WO Installation Time: _____ Installer Name: _____ Actual Install Time: _____ Installer Name: _____ Actual Install Time: _____ Installer Name: _____ Actual Install Time: _____	
<b>Contact Numbers</b> (H) 715-830-5022 eMail: Jessica Robinson		
<b>Client Signature</b>		

### Enhancement – POS/Work Order: Add Pop Up Date Calendars

Calendar Pop up Icons have been added for all Date fields for easy date entry on POS Work Orders.

Order Written By: Robert Campol Job Contact: Dan Job Location: _____ Job Phone: _____ Proposal No: _____ Cust. No: _____ Terms: Payment on Delivery Service Requested: Install 2 outdoor cameras at garage corner and over side door. Special Instructions: Side Door Camera looks at garage doors Garage camera looks at side doors	Appointment Day: Monday Time: 7:30 am Date: 1/27/2010 Start Date: 1/9/2010 Finish Date: 1/22/2010 Start Time: 10:00 am Finish Time: 10:30 am Installer: SR Done: 1/29/2010 Start Date: 1/8/2010 Finish Date: 1/23/2010 Start Time: 9:30 am Finish Time: 7:30 am Installer: MR Done: 1/19/2010 Start Date: 1/19/2010 Finish Date: 1/8/2010 Start Time: 9:00 am Finish Time: 9:00 am Installer: MR Done: 1/30/2010 Reschedule: _____ Reason: Need to go back to fix things
--	--

### Enhancement – POS Service Order: Add Pop Up Date Calendars

Calendar Pop up Icons have been added for all Date fields for easy date entry on POS Service Orders.

Warranty: <input type="checkbox"/> Yes <input type="checkbox"/> No Date Scheduled: 1/20/2010 Visit Date: 1/7/2010 Visit Date: 1/29/2010 Visit Date: 1/17/2010 Visit Date: 1/22/2010 Site Directions: York Mills east of Yonge Street	Warranty: _____ Time Scheduled: _____ Hours: _____ Hours: _____ Hours: _____ Hours: _____	Mileage: _____ Date Completed: 1/15/2010 Tech: _____ Tech: _____ Tech: _____ Tech: _____	Travel Time: _____ Notes: _____ Notes: _____ Notes: _____ Notes: _____
--	--	---	--

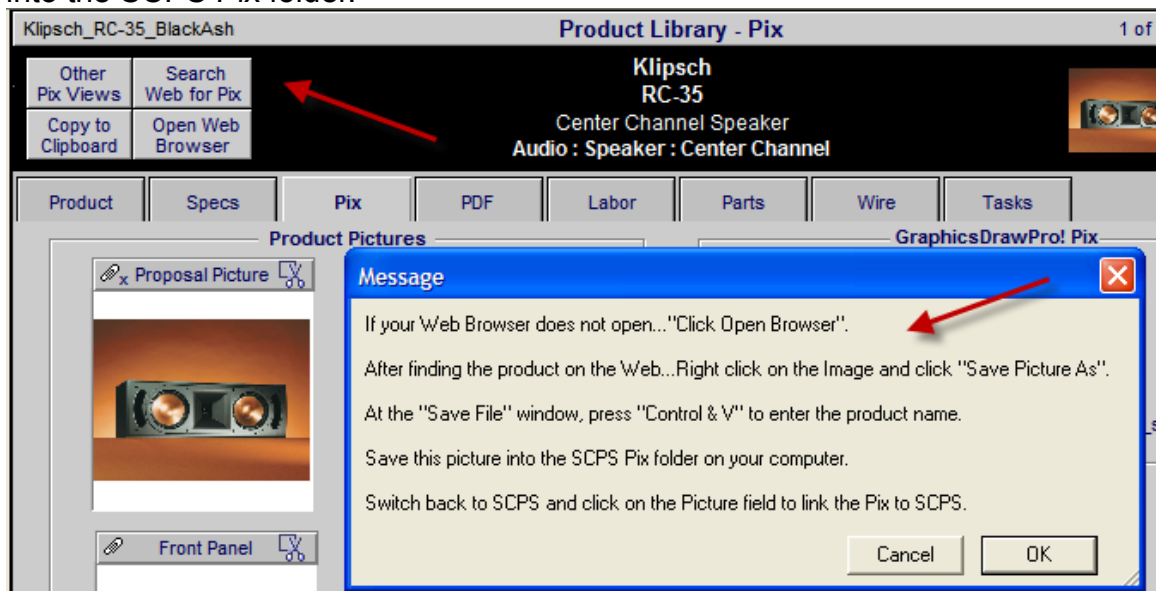
### Enhancement – POS All Invoices: Print Margin Guide

A small dot on each line on all POS Invoices indicates approximately where the each field will wrap to the next line on the printed invoice. Please note that based on each users Printer Margins this line is only an approximate indicate. Once you get used to its location it will help you anticipate the point that your text will wrap on the printed form.

Ship VIA		Payment	Terms	Reference #	Sales Rep	Quotation Title		
		Cheque	50% Down, 50% Upon Delivery		Jim Engandela			
Pick	Qty	unit	Product Description		Install (h:m:s)	Unit Price	Ext Price	Tax A B
			Kitchen:					
	1	ea	AMX : MVP-8400 : 8.4" modero viewpoint			6,615.41	6,615.41	T
	1	ea	AMX : MVP-WDS : Mvp wall/flush mount docking station			2,116.93	2,116.93	T
	1	ea	AMX : NXA-WAP200g : Wireless Access Point			399.58	399.58	T
	1		Credit for Kitchen AXD-CV6			-2,100.00	-2,100.00	T
			Vantage Lighting for Exterior Lights (Rear)					
	2	ea	Vantage : RFE1000 : Radiolink Enabler ( 1 per Master)			686.40	1,372.80	T
	7	ea	Vantage : RD11PB : RF Scenepoint Dim 4 Button Blue LED			479.00	3,353.00	T
			Additional Rear Camera					
	1	ea	GVI : SAOGVHIDCH : 1/3" 3.6mm Dome Camera (Mounting Pole by others)			502.32	502.32	T

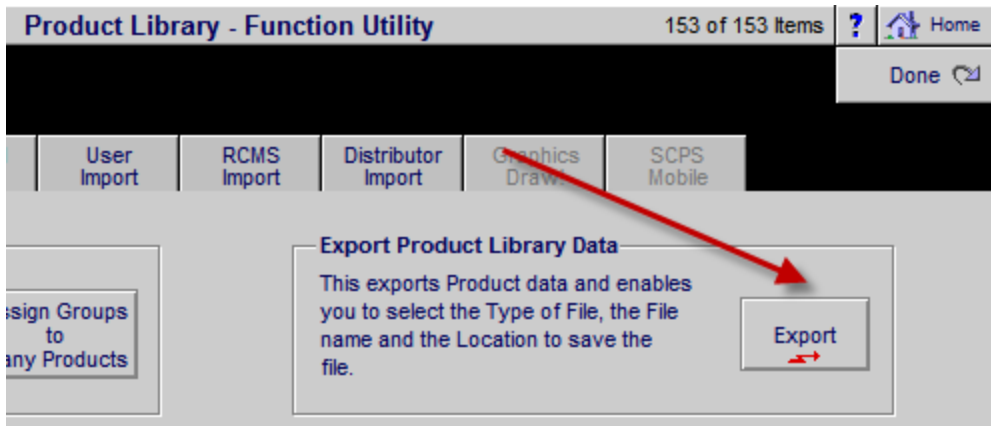
### Enhancement – Product Library/Pix: Streamline Web Search

The process of searching the Web for Product Pictures has been streamlined by eliminating all but one pop up message and enabling you to paste the Make/Model number of the product into the File Name field when saving the Pix into the SCPS Pix folder.



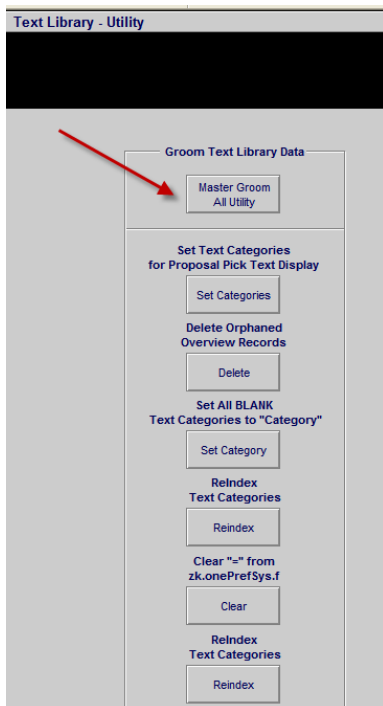
### Enhancement – Product Library/Utility/Function Utility: Export Product

The Export routine has been modified to give you the choice of File Type, File Name and Location to Save your export file. You also have the option to export All Products, All Regular Products or Only Hidden Products.



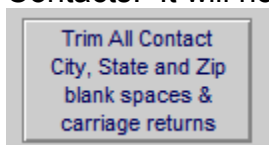
### Enhancement – Text Library/Utility: Master Grooming Button

This new Master Groom Button consolidates all of the Text Grooming Utilities shown below into a single button that runs all of them at one time. This grooming utility cleans up extra Text and Overviews showing up in your Proposal Text and Overview screens.



### Enhancement – Contacts/Utility: Trim all Contact City, State & Zip

Sometimes users will press the enter key instead of the Tab key on their keyboard and insert a blank space or carriage return in the field. This utility automatically strips these out of the Contact City, State and Zip fields on all of the Contacts. It will not harm your data.



Duplicating an Area in a Proposal now duplicates all of the Pure Parts Supplements from the Original Area. This may not work on legacy data, but any new Pure Parts added after this version 7.10 upgrade... will be duplicated.

When navigating to the (Product Detail) Parts or Wire Supplement screen from the Product List or Parts or Wire Supplement screen, adding a Part or Wire now shows up in the proper Area and with its associated supplement Labor.

## Navigating from these screens.....

Super View		Delete All Wire		Proposal - Wire Supplements										Wire Summary		Wire Detail		?  Home			
Areas		Products		Text		Ann & Bob Traaseth										Wire & Cable are Itemized		Done			
Labor		Parts		Wire		Tasks		Home Entertainment System 1294.1-1.100										150 feet per Home Run 75 feet per Room Run		Wire Manager	
All Areas				Wire Supplements										Wire Total		\$990.00					
Wire assigned to		Class		Bulk Run		No Labor		Wire Qty		Wire & Cable Make : Model		Tax A B		Install Phase		Unit Sell		Ext Sell			
Zone - Area		Qty Make : Model		View <input type="checkbox"/> Sort		Type															
Atrium		1 Linn : Akito				Bulk Wire		Home		150 ft		Linn : Bulk Analog		<input type="checkbox"/> <input type="checkbox"/>		1		\$4.25 \$637.50 <input type="checkbox"/>			
Atrium		1 Linn : Akito				Pre-Cut				1 pr		Linn : Black Interconnect		<input type="checkbox"/> <input type="checkbox"/>		3		\$120.00 \$120.00 <input type="checkbox"/>			
Balcony		1 Linn : Akito				Bulk Wire		Home		150 ft		Monster : 16/2 Spkr Wire		<input type="checkbox"/> <input type="checkbox"/>		1		\$0.45 \$67.50 <input type="checkbox"/>			
Balcony		1 Linn : Akito				Pre-Cut				1 ea		Linn : CAT5-60m		<input type="checkbox"/> <input type="checkbox"/>		1		\$165.00 \$165.00 <input type="checkbox"/>			

Adding a Part or Wire from these screens (now works properly)....

**Restore Wire Prices** **Proposal - Product Detail - Wire Supplements** 1 of 2 ? Home

Ann & Bob Traaseth  
1294.1-1.100  
Linn : Akito  
Audio : Source : Phono

Areas: Products Text Labor Parts Wire Tasks

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

Make Model Wire & Cable Add Product Qty 1 Only products classified as "Wire" can be added Wire & Cable are Itemized

Class	Bulk Run	No Labor	Qty	Wire Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell
Bulk	Home		150 ft	Linn	Bulk Analog interconnect	Analog interconnect	1	2.55	4.25	637.50
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00

**Proposal - Product Detail - Parts Supplements** 1 of 2 ? Home

Ann & Bob Traaseth  
1294.1-1.100  
Linn : Akito  
Audio : Source : Phono

Areas: Products Text Labor Parts Wire Tasks

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

Parts Make Model Parts Add Only products classified as "Parts" can be added

Qty	Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell
1 ea	Linn	Aktiv Modules	Stereo or twin mono Aktive	3	153.00	255.00	255.00

### Fix – Proposals/Product Detail/Task: Add Task to Product

Adding a Task to a Product now shows that Task on the Supplement Task screen.

**Proposal - Product Detail - Task Supplements** 1 of 4 ? Home

Ann & Bob Traaseth  
1294.1-1.100  
Linn : 5101 Personal Handset  
Audio : Multi-room : Keypad

Areas: Products Text Labor Parts Wire Tasks

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

Product Installation Tasks

Add tasks, to this Proposal, for this Product.

Priority	Task	Description	Task Owner
3	Installation	Install in location away from direct sunlight or fluorescent lighting	Installer
2	Installation	Power keypad down when removing or installing	Installer
1	Pre-wire	Review with customer for best keypad locations	Project Mgr

### Fix – Projects/Change Orders: Print Change Order List

This Print button now properly, previews and prints a report of a list of Change Orders on this screen.

**Master Project - Current Change Orders** John & Mary Smith Master Project Project List

Home Entertainment System  
1284.1c1-1.100

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	\$13,805.86			
	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	



## Fix – Contact/Print Menu/Merge Emails: Inserting email addresses

When using the Contact Menu/Print Merge Email feature, it will now open your email client application and insert the correct number of email addresses.

Contacts - Merging Contact Emails		Page	?	Home	
Copy All Email's					Done 
Export All Email's 					
<p>All Emails address must be correct and separated by a ; and a space. Example: horizon@ triwest.net; horizonse@triwest.net If the Create Email button doesn't open your email client, use the Copy All Emails button and paste them into your email address field.</p> <p>horizon@triwest.net; joesmith@aol.com </p>					