



SmartPartner Software
SCPS 9.0v1 Upgrade Announcement
New Features, Enhancements and Fixes

Hello 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 Revisions below or click on this link to view a pdf with the new Revisions.
www.horizon-software.com/download/SCPSrevisions.pdf

Download this new SCPS Version and find upgrading instructions from your SmartPartner Software/Master Preferences/Horizon Software screen.

Upgrading to the current version brings 100% of your data forward regardless of the version you are on.

Call Horizon if you need assistance with upgrading or implementing your SmartPartner software.

SCPS Yearly Revision History

http://www.horizon-software.com/download/SCPSrevisions_2011.pdf
http://www.horizon-software.com/download/SCPSrevisions_2010.pdf
http://www.horizon-software.com/download/SCPSrevisions_2009.pdf
http://www.horizon-software.com/download/SCPSrevisions_2008.pdf
http://www.horizon-software.com/download/SCPSrevisions_2007.pdf
http://www.horizon-software.com/download/SCPSrevisions_2006.pdf
http://www.horizon-software.com/download/SCPSrevisions_2005.pdf
http://www.horizon-software.com/download/SCPSrevisions_2004.pdf
http://www.horizon-software.com/download/SCPSrevisions_2003.pdf

Regards,
Jim Engandela
President/Developer
Horizon Software
(715) 287-3335 phone
(715) 287-4464 fax
horizon@triwest.net email
www.horizon-software.com website

SCPS Version 9.0v1
Released: 12/20/2011

Enhancement- SmartPartner Software System Wide grooming.

The SmartPartner High Definition database has 11,034 fields, 997 screens, 8,623 scripts, 918 Value Lists and 1,868 Relationships. All screens, field definitions, script routines, value lists and relationships have been groomed to increase speed, improve stability and reduce file size. All SCPS screens have also been adjusted so that they look better when users select the 150% magnification option.

Enhancement-Proposals: Duplicating Proposal Option to Reset Master Preferences

When Duplicating a Proposal with a New Full Proposal Number, you now have the option to Reset the Duplicated Proposal Preferences (Cover Page Text, Contract, Etc) to the Current Master Preferences or to keep them like the original Proposal.

The screenshot shows the 'Proposals' main window. A message dialog box is open, asking: "Do you want to Reset the Duplicated Proposal Preferences to the Current Master Preferences (for this Location) or Keep them as is?". The dialog has two buttons: "Keep" and "Reset". A red arrow points to the "Reset" button. The background shows a table of proposals with columns for Status, Dup, Number, User, Client, Company, Proposal Title, Created, Total, Fav, and a trash icon.

Status	Dup	Number	User	Client	Company	Proposal Title	Created	Total	Fav	Trash
<input type="checkbox"/>	<input type="checkbox"/>	1279.1-1.100		Traaseth, Ann & Bob		Home Entertainment	9/12/2006	\$30,647	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	1279.5-1.100						\$30,647	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	1282.1-1.100						\$79,178	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	1290.1-1.100						\$3,936	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	1291.1-1.100						\$0	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	1292.1-1.100						\$68,360	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	1316.1-1.100						\$30,647	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	1317.1-1.100						\$30,647	<input type="checkbox"/>	<input type="checkbox"/>

Enhancement- Proposal/Info: Add "Reasons Lost Proposal" field

You can now document the reasons you "lost" a Proposal so that you can make adjustments for the future to help increase your close ratio.

The screenshot shows the 'Proposal - Info' form for Hayes Callahan. The form is divided into 'Info' and 'Specialist Info' sections. A red arrow points to the 'Reasons Lost Proposal' field in the 'Info' section, which contains the text: "Client purchased from Best Buy because the price was lower." The 'Specialist Info' section includes fields for Sales Location, Sales Specialist, Project Manager, and Project Engineer.

Client	Project
Hayes Callahan	Home Entertainment System
Info	Contacts
1290.1-1.100	Com Log

Proposal-Project Info

Project Reference:

Blueprint Reference:

Where did you hear?:

Client Referred By:

Reasons Lost Proposal:

Specialist Info

Sales Location:

2950 Mall Drive
Eau Claire, WI 54701

Sales Specialist:

Title:

Email:

Project Manager:

Email:

Project Engineer:

Email:

Additional "Client Intro Letter" Signature

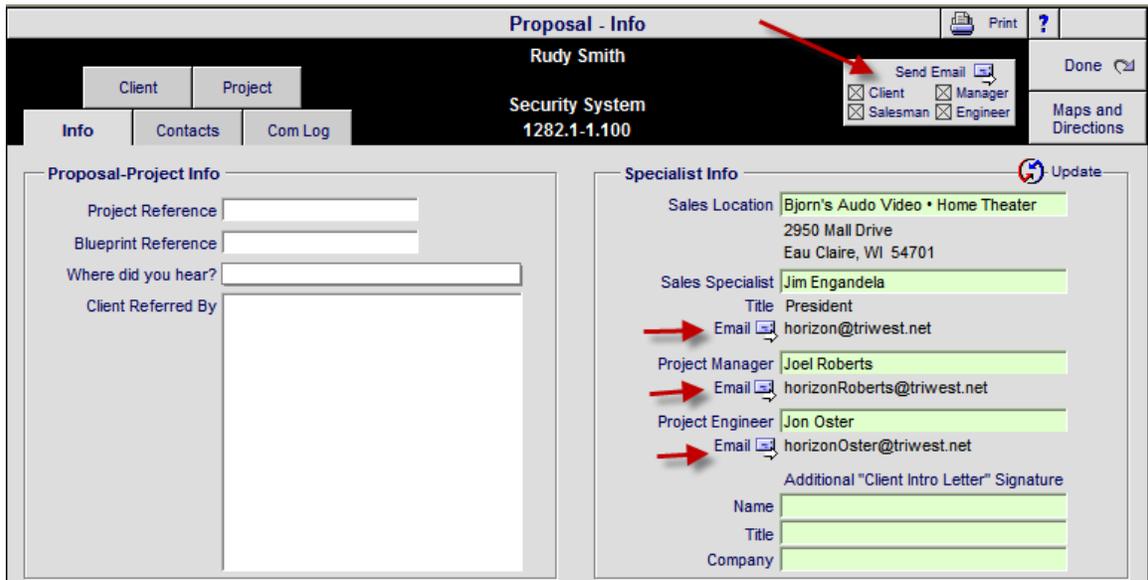
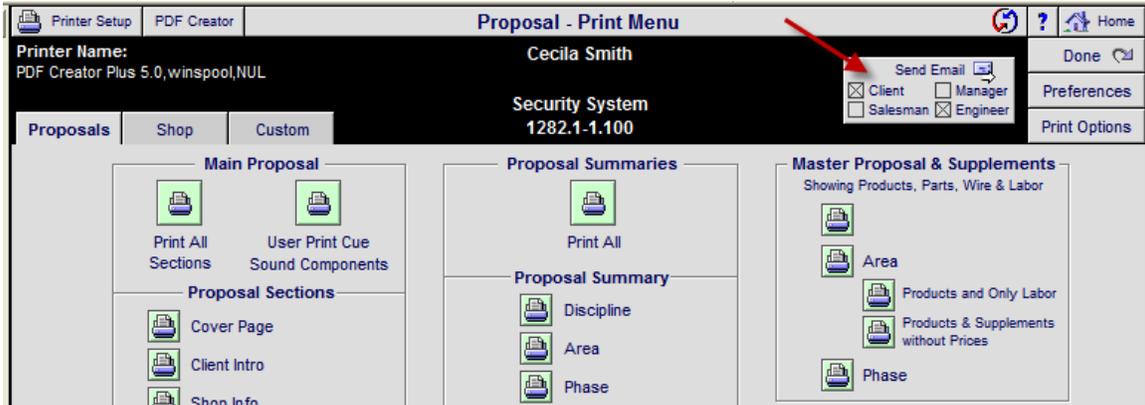
Name:

Title:

Company:

Enhancement- Proposal/Projects Info & Print Menu: Email Client, Salesman, Mgr and Engineer

You can now create an email with containing the email addresses that you select, by checking the Client, Salesman, Project Manager and Project Engineer check boxes. The email will be created automatically using your email client. You can then populate the Subject and Message and attach any documents to the email before sending it. This feature resides in the Proposal/Project Info and Print Menu screens. Email addresses have been added to the Info screen and reside in the Master Prefs/User screen for each user.



Enhancement- Proposal/Print Menu: Areas & Products with Preliminary Contract Options

You now can select a variety of options when printing this Areas & Products report so that it can be used as a Preliminary Contract.

Proposal - Print Menu

Printer Name: PDF Creator Cecila Smith

PDF Creator Plus 5.0_winspool,NUL

Security System
1282.2-1.100

Send Email Client Manager Salesman Engineer

Done Preferences Print Options

Proposals Shop Custom

Main Proposal

Print All Sections

User Print Cue Definitive Audio

Proposal Sections

Cover Page

Client Intro

Shop Info

Overviews

Areas & Products

A&P with Area Totals
Price Expiry, Pricing Policy and Preliminary Contract Disclaimer Options

Product Summary

Product Summary with Unit and Ext Totals

Fees & Services

Contract

Extra Text

Proposal Summaries

Print All

Proposal Summary

Discipline

Area

Phase

Sub Total Summary

Discipline

Area

Phase

Grand Total Summary

Discipline

Area

Phase

Product Summary

Product Summary by Discipline with Totals

Master Proposal & Supplements

Products, Parts, Wire & Labor

Discipline

Area

Products & Only Labor

Products & Supplements without Prices

Phase

Proposal Supplements

Print All

Supplements

Labor Summary

Labor Detail List

Parts Summary

Parts Detail List

Wire & Cable Summary

Wire & Cable Detail List

Proposal - Area & Products Report - Print Options

PDF Creator Plus 5.0_winspool,NUL Rudy Smith

Security System
1282.2-1.100

Print Report Cancel

Page Break after each Area

Yes No

Area Subtotals

Show Area Totals Hide Area Totals

Price Expiry Notice

Do not show Price Expiry Notice

Do Not Show Date

Pricing Terms

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

Preliminary Disclaimer

Header	Preliminary Contract Disclaimer
<input type="checkbox"/> Do not show Preliminary Contract Disclaimer	Message This is a Preliminary Contract only. The Final Contract is the official Contract.

Enhancement- Proposal Status: Review (Do not Print)

If you set the Proposal Status = Review then you not be able to Print the Proposal and get this pop up message when entering the Print Menu. You can change the status on the Proposal List screen and on the Proposal Utility screen in a Proposal.

Proposal - Detail by Area

Client: Hayes Callahan
 Areas: Home Entertainment System
 Area Text: 1290.1-1.100

Discipline: Category: Type Make: Model Description Area Totals

Home Entertainment System

Atrium 3,650.00

Audio : Multi-room : Keypad 1 ea Linn : 5101 Personal Handset Universal learning remote Universal 390.00

Message

This Status of this Proposal has been set to "R" = Review and cannot be printed.
 Please Review this Proposal.
 Then change the Status on the Proposal List screen or the Utility screen in this Proposal.

OK

Proposals

Status	Dup View	Number	User	Client	Company	Proposal Title	Created	Total Fav
		1292.1-1.100		Christenson, Cecilia	Wade Realty	Home Entertainment	11/9/2011	\$68,360
		1291.1-1.100		Dowling, Dave		Home Entertainment	10/27/2011	\$0
R		1290.1-1.100		Callahan, Hayes		Home Entertainment	7/1/2011	\$3,936
		1282.1-1.100		Defiglia, Rudy & Cecilia		Security System	9/12/2006	\$79,178
		1279.1-1.100		Traaseth, Ann & Bob		Home Automation	9/12/2006	\$30,647

Proposal Utility

Client Mode ? Home

Hayes Callahan

Home Entertainment System
 1290.1-1.100

Caution: These Utilities will permanently alter this Proposal

Sell this Proposal
 Convert this Proposal into a Project
 All Option Products and Supplements will be Deleted from this Proposal

Enhancement-Proposal/Print Menu: Proposal Sections

Adjustments have been made to the Proposal Areas & Product and Contract reports for both regular and custom reports to put less strain on PDF creation.

Enhancement-Proposal/Print Menu/Contract: Slide Totals

Contract Subtotals now slide up to remove blank spaces when the number of subtotals are changed from 5-3-2-1.

Enhancement-Project/Supplements/Wire/Wire Manager: New Manual Install Location field

When you select an End Product from the pop-up list the Install Location for that product is automatically entered and you can modify it. When you assign or manually enter an End Location you can now type in an Install Location in the "Manual - End" Install Location field. Please do not enter text in both the Product and the End Install Location fields because they occupy the same space on the printed Wire Chart.

Assign a Main Location to Wire Ends		Sort Definitions		Proposal - Wire Manager				Product Install Locations		Wire Labels		AutoSet Wire ID's	
Main End Locations Pick a "Main End Location" then...click the End button or...Pick/Type a Product in the End field		Source Discipline Type Zone/Area Make/Model	Source Zone/Area Type Make/Model	Rudy Smith Security System 1282.2-1.100				Wire Chart		Done		AutoSet Wire ID's	
Source Discipline Type	Source Product Zone - Area - Make - Model	Wire		End Product Zone - Area - Make : Model	Source ID	Wire		End ID					
Audio	1 - Basement - Linn : Katan	Assign Main End Location	End	1 - Basement - Linn : 5101 Personal Handset	Src-0001	Bulk		Loudspeaker cable		End-0001		Room Run	
Bookshelf	Source Product Location		End	Install Location for the 5101									
Audio	1 - Basement - Linn : Katan		End	House Audio Head End	Src-0002	Bulk		Loudspeaker cable		End-0002		Room Run	
Bookshelf	Source Product Location			Manually entered End Location									

Bookshelf	1 - Basement - Linn : Katan	Source Product Location	1 - Basement - Linn : 5101 Personal Handset	Install Location for the 5101 Product
B	75 ft	Src-0001	Loudspeaker cable	End-0001
Bookshelf	1 - Basement - Linn : Katan	Source Product Location	House Audio Head End	Manually entered End Location
B	75 ft	Src-0002	Loudspeaker cable	End-0002

Enhancement- Projects/Final Change Orders: Enable Subtotal Option

You can now change the Subtotal option on Final Change Orders, like you can do on a Pending Change Order.

Contract

5 Subtotals

5 Subtotals = All 5 Subtotals separate
 3 Subtotals = 1 (Products), 2 (Parts + Wire), 3 (Labor + Fees)
 2 Subtotals = 1 (Products + Parts + Wire), 2 (Labor + Fees)
 1 Subtotal = Combines all into 1 Subtotal

Enhancement- Project/PO, WO and SI: Products Sum Mode...Add Finish to Qty Sum

If you have Products that have the same Make & Model, but different Finishes, they will now show up as separate line items when you show this screen in the Sum mode. The Purchase Order, Work Order and Sales Invoice screens all now display and sum Finishes in this manner.

Purchase Orders - All - 10 Products														
Cecilia Smith 1282.2-1.100										Qty Remaining to Order	Still on Order	Create PO	Leave	
Global Buy Pkg Off										Products 33		Auto Set Qty to Order	View P.O.'s	
										Parts 13				
										Wire 4,371				
Phase	Zone - Area	Make : Model	PO Description	Update	Finish	Vendor ?	Qty Sold	Qty Staged	Remaining to Order	Qty to Order	PO's to Date	On Order	Recvd to date	Still on Order
3	Linn : 5101 Personal Handset	Universal	9/26/2011	Black	\$234.00	\$234.00	2 ea		2					
3	Linn : 5101 Personal Handset	Universal	9/26/2011	Cherry	\$234.00	\$234.00	1 ea		1					
3	Linn : 5125	Five channel	9/26/2011	Cloth	\$1,850.00	\$1,850.00	1 ea		1					
3	Linn : 5125	Five channel	9/26/2011	Black	\$1,850.00	\$1,850.00	1 ea		1					
3	Linn : 5125	Five channel	9/26/2011	Silver	\$1,850.00	\$1,850.00	1 ea		1					
3	Linn : Katan	Bookshelf	9/26/2011	Black	\$597.00	\$597.00	15 pr		15					

Enhancement- Project/Print Menu/Shop: Staging Sum Document: Add Finish to Qty Sum

If you have Products that have the same Make & Model, but different Finishes, they will now show up as separate line items when you this Sum mode report

Printer Setup | Original Project - Print Menu - Shop | Done

Printer Name: Cecilia Smith
PDF Creator Plus 5.0,winspool,NUL

Security System
1282.2-1.100

Proposals | Shop | Custom

Job Costing

- Project Pricing
- Master Project Pricing
- Payment Terms
- Payments & Balances Summary

Subtotal Costing

- Subtotals by Discipline
- Grand Totals by Discipline

Installation Utilities

Select Phase

- 1 Prewire
- 2 Trim
- 3 Final

- Staging Document
Products & Parts with Wire Option
- Staging Document
*with total quantity (+ - sum)
Products & Parts with Wire Option*
- Staging Document by Discipline
*with total quantity (+ - sum)
Products & Parts with Wire Option*

Project Info

- Client/Project Info
- Project Site Directions
- Project Tax Summary
- Product Warranties
- Product Cut Sheets

12/17/2011 | Bjorn's Audio Video • Home Theater - Confidential Report | Page 2

Staging Document - Total Qty

Cecilia Smith
Security System
1282.2-1.100

Phase-Class	Qty	Make-Model-SKU-Finish	Ck	InStock	OnOrder	Date	Initial
3 Final Product	1 ea	Linn : 5125 : Cloth Five channel power amplifier (Black)	Order	<input type="checkbox"/>			
			Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
3 Final Product	1 ea	Linn : 5125 : Silver Five channel power amplifier (Black)	Order	<input type="checkbox"/>			
			Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
3 Final Product	9 ea	Linn : Melodik : Black Aktive isobarik bass extension	Order	<input type="checkbox"/>			
			Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
3 Final Product	4 ea	Linn : 5101 Personal Handset : Black Universal learning remote	Order	<input type="checkbox"/>			
			Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
3 Final Product	1 ea	Linn : 5101 Personal Handset : Cherry Universal learning remote	Order	<input type="checkbox"/>			
			Re'vd	<input type="checkbox"/>			
			Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			

Enhancement- Project/Info: Add "Project Assessment" field and replicate Proposal Info screen

You can now document the good and bad things that happened for this Project to help make improvements to your future Project. The Project Info screen now looks like the Proposal Info screen with email addresses and a separate Maps and Directions screen.

Original Project - Info Print ?

Rudy Smith

Client Project

Info Contacts Com Log

Security System

1282.2-1.100

1 - Shop Location #
01 - Alt Shop Location #
100 - Salesman's Number #

Done

Maps and Directions

Proposal-Project Info

Proposal Due Date: 6/17/2010

Project Reference:

Blueprint Reference:

Project Referred By:

Project Assessment:

Specialist Info Update

Sales Location: Bjorn's Audio Video • Home Theater
2950 Mall Drive
Eau Claire, WI 54701

Sales Specialist: Jim Engandela
Title: President
Email: horizon@trivest.net

Project Manager: Dave Dowling
Email: horizonDowling@trivest.net

Project Engineer: Jon Oster
Email: horizonOster@trivest.net

Additional "Client Intro Letter" Signature

Name:

Title:

Company:

Proposal-Project Notes

Permanent Contact Notes

Shop Notes

Enhancement-Product Library: Supplement Color Indicators

The Supplement Indicators for Phantom Products, Labor, Parts and Wires are now color coded to make identifying them easier.

Product Library - Line List										AlphaFind: Make	Hidden	?	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
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> <p>Show Products</p> <p>Part Phantom</p> <p>Bulk PreCut</p> </div> <div style="border: 1px solid gray; padding: 2px;"> <p>Hidden Products</p> <p>Groom Products</p> </div> <div style="border: 1px solid gray; padding: 2px;"> <p>Detail List</p> <p>Misc Lists</p> </div> <div style="text-align: center;"> </div> <div style="text-align: right;"> <p>New Product</p> <p>Product Utilities</p> <p>Inventory Control</p> </div> <div style="text-align: right;"> <p>Leave </p> <p>Product Sets</p> <p>Print Menu</p> </div> </div>										153 Items	153 Total	Phan Lab	Part Wire													
Displin	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Sell Price	Cue	Auto Tag	Notes	Fav	Hide											
Audio	Speak	Center Channel			Klipsch	RC-35		Center Channel	Black	399.00 ea																
Audio	Speak	Floor			Klipsch	RF-35 (6483)		Reference Tower	Black	499.00 ea																
Audio	Speak	Bookshelf			Klipsch	RS-7		Reference Surround	Matte	450.00 ea																
Audio	Speak	Powered			Klipsch	RSW-10		Reference Subwoofer	Black	1,000.00 ea																
Audio	Multi	Keypad			Linn	5101 Personal Handset		Universal learning	Black	390.00 ea																
Audio	Ampli	Surround Process			Linn	5103 System Controller		Linn 5103 inc DTS, no		5,500.00 ea																
Audio	Ampli	Multi-channel			Linn	5125		Five channel power	Silver	645.00 ea																
Audio	Sourc	Phono			Linn	Akito		Pick up tonearm	Black	1,100.00 ea																

Enhancement-Product Library: Supplement Indicators turn off and on automatically

Supplement Indicators on Tabs now turn off and on automatically if the product has Labor, Parts, Wire or Task supplements assigned.

Product Library - Parts Supplements 4 of 153

Klipsch
RSW-10
Reference Subwoofer
Audio : Speaker : Powered Subwoofer

Done Return to List
Prev Next

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

Group Assigned Parts Do not use Group Parts

Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Price
1	ea	Linn	Phono Plugs-Standard	Pack 6 red/6 black standard	3	\$95.00	\$95.00

Make Model Manually Assigned Parts Total Group Price \$95.00

Qty Unit Make Model Description Phase Unit Price Ext Price

1	ea	Linn	Aktiv Modules	Stereo or twin mono Aktive	3	\$255.00	\$255.00
---	----	------	---------------	----------------------------	---	----------	----------

Parts Labor: \$0.00 Total Manually Assigned Price \$255.00
Grand Total Parts Price \$255.00

Enhancement-Product Library/Product Detail/Labor: Do not use Group Labor option

You now have the option to Not Use the Group Labor assigned to a product. When this check box is checked the Product Group Labor will not be added to the Proposal when this product is picked.

Product Library - Group Labor Supplements 1 of 153

Klipsch
RC-35
Center Channel Speaker
Audio : Speaker : Center Channel

Done Return to List
Prev Next

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

Group Assigned Labor Do not use Group Labor

Audio : Speaker : Center Channel
Classification: Product
Primary Install Phase: 3 Final

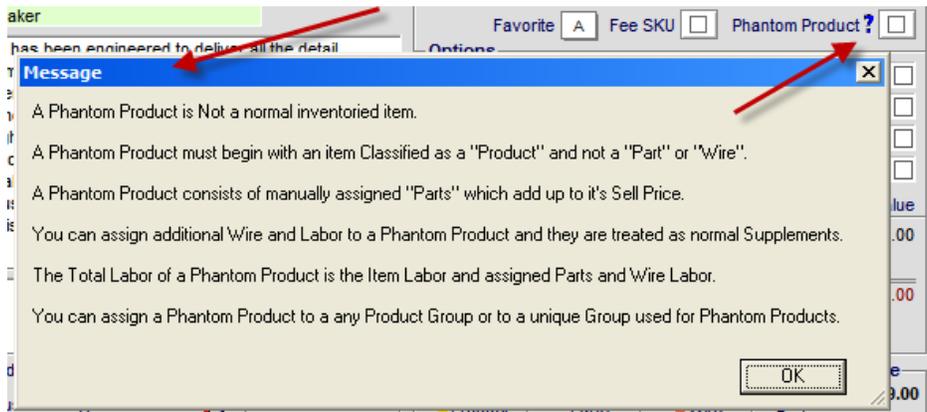
Labor Categories	Default Labor Rate	Group Labor Time (hrs:min:sec)		
		Phase 1 Prewire	Phase 2 Trim	Phase 3 Final
1 - Installation	\$60.00	0:00:00	0:00:00	0:20:00

Engage Manual Labor Override
Apply DOD 2 Avg 10%
Apply DOD 3 Avg 50%

Total
Total Labor Time 0:00:00 0:00:00 0:20:00 = 0:20:00 hrs:min:sec
Total Labor Amount \$20.00 = \$20.00 Amount

Enhancement-Proposal & Product Library: Phantom Product Help

A Help ? button has been added that explains how Phantom Products are used.



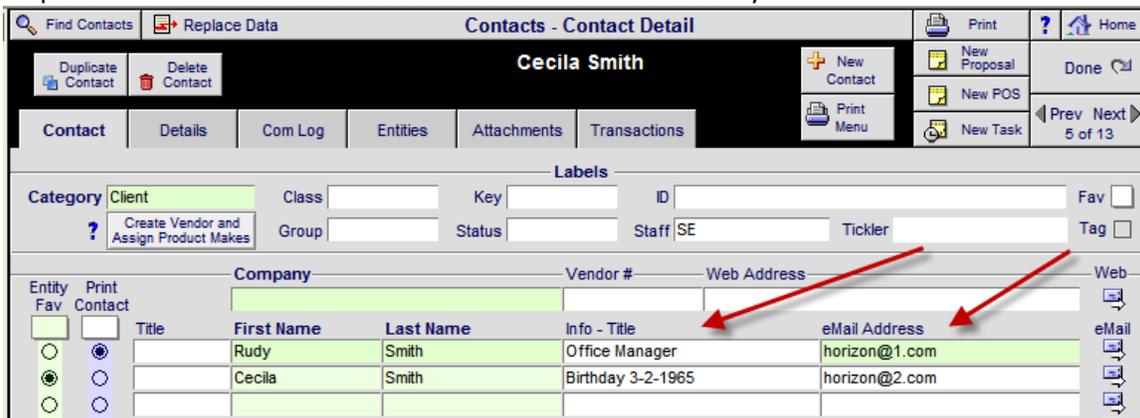
Enhancement- Contacts/Utility/Export Contacts: Export of All Contacts & Email Addresses

You can now create a file that you can open in Excel that contacts all of your Contacts and all Email Addresses for each Contact.



Enhancement- Contacts/Detail: Expanded Info - Title field

The Title field has been renamed to Info – Title and expanded so that you can store info in it and keep the Email address free and dedicated to Email Address only.

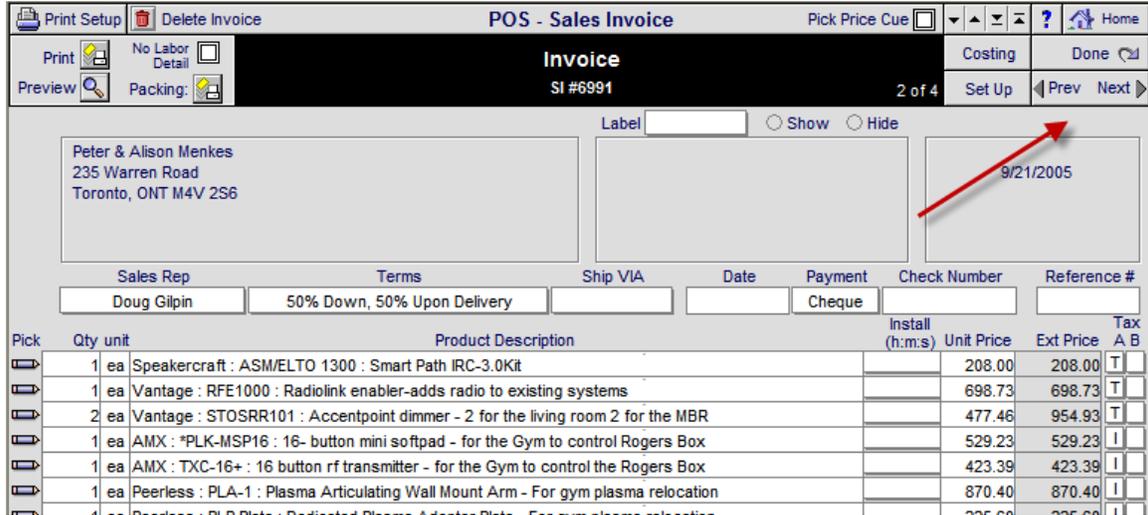


Enhancement- Defeat mouse scroll wheel

When viewing the Detail screens in these modules, your mouse scroll wheel is automatically turned off, so that you don't accidentally scroll to another record in that module. If you want to move to another record, please use the Pre/Next buttons.

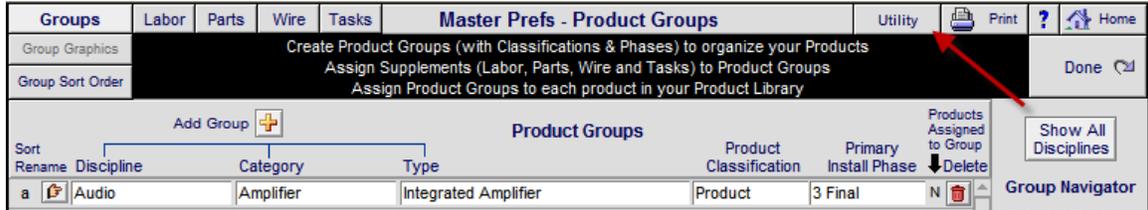
Modules this affects

POS, Contacts, Proposal Areas, Proposal Products, Products, Product Sets, Text, Info, Letter, Follow-up, Master Tracker.



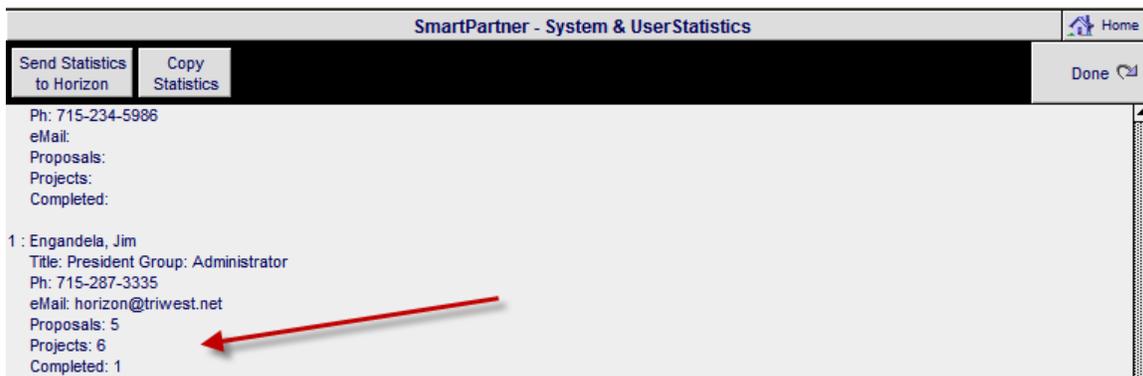
Enhancement-Master Prefs/Groups/Utility: Delete Group Supplements

A new Group Utility enables you to delete all of the Supplements (labor, parts, wire, tasks) from your Groups.



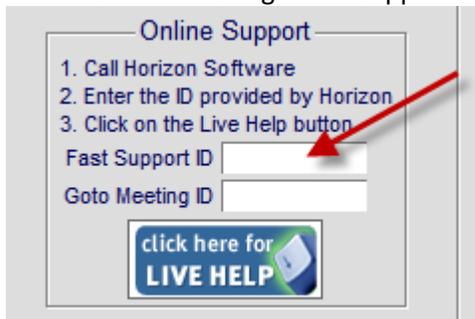
Enhancement- Logo Screen/Utility: System Wide SCPS & User Statistics

You can now view SCPS and User Statistics from the main Logo screen/Utility screen. These statistics contains SCPS System and Module info, as well as info for each User, such as the number of Proposals, Project and Completed Projects. Statistics also include Shop Locations, POS and Product Library info.



Enhancement-Horizon Online: Fast Support ID

Add a field for entering a Fast Support ID, just like the Goto Meeting ID.



Fix-Proposals: Delete correct amount of Labor when Deleting Parts & Wire Supplements

When deleting Parts and Wire Supplements the correct amount of Labor Amount/Labor Time is removed regardless of the conditions.

Fix-Proposal/Supplements: Delete Labor = 0 time

When Deleting Supplement Labor, the Labor time is now always set to 0 and not a negative number.

Fix -Proposal/Product Detail/Parts & Wire Detail: Stay in Areas when adding Parts/Wire

If you go into the Proposal Products screen and find all like kind products in all Areas and then click on the Product Detail button you can edit each product and cycle through each Area. If you Add a Part or Wire to a Product you would no longer be able to cycle through the Areas. This has been corrected. Also because of this bug you sometime would get an error message asking you to Select an Area. This has been corrected as well.

Fix -Proposal/Project List: Sort in Ascending Order

Sorting Proposal Numbers in Ascending Order has been fixed so that Duplicated Proposals/Project numbers sort properly.

Fix-Proposal/Print Menu: Custom Reports: Areas & Products with Totals - Tax Labels

The Custom Areas & Products Report now properly displays the Tax Labels next to the Tax Amounts.

Electronics & Installation

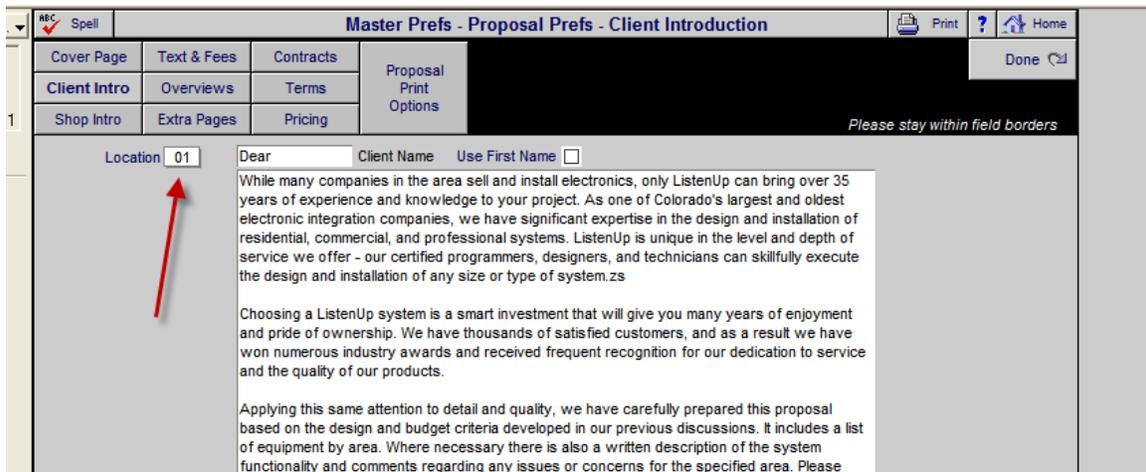
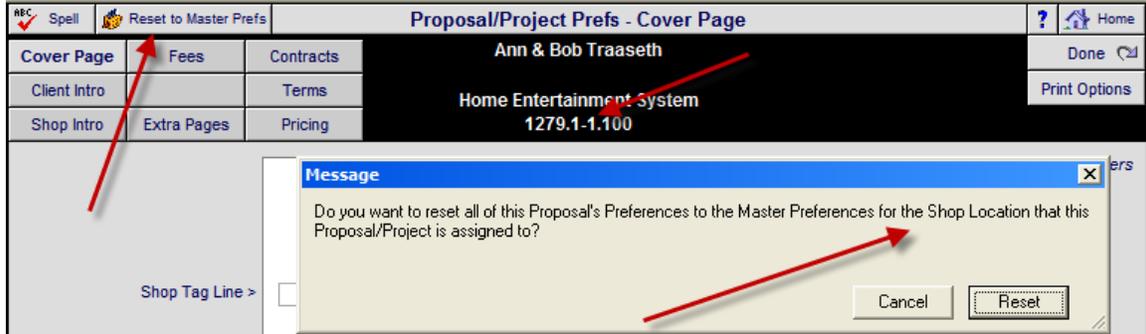
	Equipment	\$22,909.95
	Installation	\$995.83
	Misc. Parts	\$200.00
	Wire & Cable	\$3,041.20
	Additional Fees	\$2,006.61
\$29,253.59 List Price	Total	\$29,153.59
-\$100.00 Courtesy Discount	Tax	\$1,493.08
\$29,153.59 Total	Grand Total	\$30,646.68

Prices quoted are guaranteed until: 12/5/2011



Fix-Proposals/Print Menu: Reset Proposal Preferences to the Master Preferences

This routine has been improved to increase its reliability on duplicated Proposals. Please note that if you have multiple Shop Locations that this routine will use the Master Preferences from the Location that this Proposal was created from. The digit to the right of the "-" in the Proposal Number represents the Shop Location.



**SCPS Version 8.5v1
Released: 9/26/2011**

Enhancement-Proposal/Print Menu: New Custom Reports Module (8.5v1)

The Custom Proposal Reports module enables users to fully customize the graphical look of their Proposals and have those changes come forward with each upgrade. The new Proposal Custom Reports module now matches the new regular Contract format. SmartPartners that are using the Custom Reports Module should contact Horizon and we can help you modify the new module with your custom layouts.

Print Status	
Shop Location: EME Audio & Video Systems	Proposal Status <input type="text"/>
Contract: 1 - Contract 1	User Print Cue <input type="text" value="Sound Components"/>
Product Listing Option: A1 Make-Model-Description-Finish	Report Date <input type="text" value="9/26/2011"/> <input type="checkbox"/> Date Lock
Product Pricing Option: Product : Ext Sell	<input type="checkbox"/> Show Print Dialog when printing
Subtotal Pricing Option: 5 Subtotals	<input checked="" type="checkbox"/> User Custom Print Layouts
Printer Name: hp LaserJet 1320 PCL 6,winspool,Ne03:	User Custom Layouts - Version 8.5v1

Enhancement-Proposal/Detail by Area/Discipline & Phase: System Total Record Color

The System Total Record now has a color background to help differentiate it from the other records. This color has been added to all 9 Area, Discipline and Phase screens. The Proposal Title and the Zone/Area name have also been centered for improved clarity.

Discipline	Area	Phase	Proposal - Detail by Area		Q View	Utility	Home
Client	Areas	Area Text	Mike & Jessica Potter		Pricing	Purchasing	Leave
Project	Info	Products	Security System		Tracker	Work Orders	Change Orders
Contact	Log	Supplements	1282.1-1.100		Payments	Invoicing	Print Menu
Client Mode <input type="checkbox"/>	Super View	Sum View			Labor Meter	Labor Total	Grand Total
Discipline : Category : Type			Make : Model	Description	Area Totals		
Security System							
Zone 1 - Basement							27,146.98
Audio : Amplifier : Multi-channel			1 ea	Linn : 5125	Five channel power amplifier (Black)		2,750.00
Audio : Speaker : Bookshelf			5 pr	Linn : Katan	Bookshelf loudspeakers: pair Bookshelf		4,975.00
Audio : Speaker : Powered Subwoofer			1 ea	Linn : Melodik	Aktive isobarik bass extension		4,950.00
Video : Display : DLP Video Projector			1 ea	Runco : CL-610	DLP Projector DLP Projector		7,995.00
Video : Source : DVD Player			1 ea	Sony : DVP-NS999ES	Progressive Scan DVD Player		1,099.95
Automation : Remote : Handheld Remote			1 ea	Linn : 5101 Personal Handset	Universal learning remote Universal		390.00
Automation : Control : Keypad			1 ea	Linn : Knekt RCU	Knekt room control unit Knekt room		750.00
Zone 1 - Home Theater							27,146.98
Audio : Amplifier : Multi-channel			1 ea	Linn : 5125	Five channel power amplifier (Black)		2,750.00
Audio : Speaker : Bookshelf			5 pr	Linn : Katan	Bookshelf loudspeakers: pair Bookshelf		4,975.00
Audio : Speaker : Powered Subwoofer			1 ea	Linn : Melodik	Aktive isobarik bass extension		4,950.00
Video : Display : DLP Video Projector			1 ea	Runco : CL-610	DLP Projector DLP Projector		7,995.00
Video : Source : DVD Player			1 ea	Sony : DVP-NS999ES	Progressive Scan DVD Player		1,099.95
Automation : Remote : Handheld Remote			1 ea	Linn : 5101 Personal Handset	Universal learning remote Universal		390.00
Automation : Control : Keypad			1 ea	Linn : Knekt RCU	Knekt room control unit Knekt room		750.00

Discipline	Area	Phase	Proposal - by Area Subtotals				Print	Home
Subtotals	Subtotals	Subtotals	Mike & Jessica Potter				Done	
Grand Totals	Grand Totals	Grand Totals	Security System 1282.1-1.100				Show Sales Tax yes no	Client Mode <input type="checkbox"/>
Zone-Area			Sell	Cost	GP%	Labor (h:m:s)		
Security System	Equipment		45,819.90	27,412.80	40.2%			
	Installation		1,991.67	1,076.67	45.9%			
	Misc. Parts		400.00	238.00	40.5%			
	Wire & Cable		6,082.40	3,577.44	41.2%			
	Additional Fees		3,273.22	1,636.61	50.0%			
	Total		\$57,567.18	33,941.52	41.0%		30:40:00	
	Tax		2,986.17					
	Grand Total		\$60,553.35					
Zone 1 - Basement	Equipment		22,909.95	13,706.40	40.2%			
	Installation		995.83	538.33	45.9%			
	Misc. Parts		200.00	119.00	40.5%			
	Wire & Cable		3,041.20	1,788.72	41.2%			
	Total		27,146.98	16,152.45	40.5%		15:20:00	
	Tax		1,493.08					
	Zone 1 - Basement Total		28,640.07					
Zone 1 - Home Theater	Equipment		22,909.95	13,706.40	40.2%			
	Installation		995.83	538.33	45.9%			
	Misc. Parts		200.00	119.00	40.5%			
	Wire & Cable		3,041.20	1,788.72	41.2%			
	Total		27,146.98	16,152.45	40.5%		15:20:00	
	Tax		1,493.08					
	Zone 1 - Home Theater Total		28,640.07					

Discipline	Area	Phase	Proposal - by Area Grand Totals				Print	Home
Subtotals	Subtotals	Subtotals	Mike & Jessica Potter				Done	
Grand Totals	Grand Totals	Grand Totals	Security System 1282.1-1.100				Show Sales Tax yes no	Client Mode <input type="checkbox"/>
Zone-Area			Sell	Cost	GP%	Labor (h:m:s)		
Security System	Total		\$57,567.18	33,941.52	41.0%		30:40:00	
	Tax		\$2,986.17					
	Grand Total		\$60,553.35					
							Fees Total \$3,273.22	
							Fees Total w/Tax \$3,273.22	
Zone 1 - Basement	Total		27,146.98	16,152.45	40.5%		15:20:00	
	Tax		1,493.08					
	Zone 1 - Basement Total		28,640.07					
Zone 1 - Home Theater	Total		27,146.98	16,152.45	40.5%		15:20:00	
	Tax		1,493.08					
	Zone 1 - Home Theater Total		28,640.07					

Enhancement-Proposal/Product List: Improved layout

Proposal/Product List screen has several product details rearranged for improved clarity. Access to the Supplemental and Sum View screens now appears at the top of the Areas and the Product List screens.

Super View	Supp View	Sum View	Proposal - Products										Client Mode	Home	
Areas			Text			Products			Mike & Jessica Potter				Update All Products	Adjust Selected Prices	Done
Labor			Parts			Wire			Tasks			Security System 1282.1-1.100		Install Location Notes	Product Total \$45,819.90
View	Change Product	Change Group	Zone - Area	Discipline	Exclude in Totals	Make Category	All 14 Products	Product Labor	Unit List	Adjusted Sell	Extended Sell				
Auto Tag	Option	Phase	Type	Description	Sell Price Updated	Parts Labor	Wire Labor	Min Sell	Unit Sell	GP%	Ext Installed	Ext Discount			
1 ea	1 - Basement	Linn	5125	Amplifier			80.00	2,750.00	2,750.00		2,750.00	2,830.00			
3	1 - Basement	Linn	Katan	Speaker			287.50	995.00	995.00		4,975.00	5,262.50			
1 ea	1 - Basement	Linn	Melodik	Speaker			130.00	4,950.00	4,950.00		4,950.00	5,080.00			
3	1 - Basement	Linn		Powered Subwoofer			318.75	2,970.00	40.0%						

Enhancement-Proposal/Product Supplement View: Improved layout

Proposal/All Supplements View screen has been rearranged for improved clarity.

Super View	Supp View	Sum View	Proposal - Supplement View										Grand Total	Home	
Areas			Text			Products			Mike & Jessica Potter				Products Labor Parts Wire	Done	
Labor			Parts			Wire			Tasks			Security System 1282.1-1.100		Area Total	Labor Summary
Labor Supplements													Delete All Labor		
Zone - Area	Qty	Make : Model	View Edit	Labor Type	Sort	Install Phases	Tax A B	Hourly Rate	Total Time with DOD (h.m.s)	Ext Sell					
1 - Basement	1	Linn : 5101 Personal Handset	Q	Programming		3	T T	\$80.00	0:30:00	\$40.00					
1 - Basement	1	Linn : 5101 Personal Handset	Q	Calibration		3	T T	\$100.00	0:20:00	\$33.33					
1 - Basement	1	Linn : 5101 Personal Handset	Q	Wire Labor - Bulk		1	T T	\$60.00	1:15:00	\$75.00					
1 - Basement	1	Linn : 5125	Q	Installation		3	T T	\$60.00	1:00:00	\$60.00					
1 - Basement	1	Linn : 5125	Q	Wire Labor - Precut		3	T T	\$60.00	0:20:00	\$20.00					
1 - Basement	5	Linn : Katan	Q	Installation		3	T T	\$60.00	1:40:00	\$100.00					
Labor Total									30:40:00	\$1,991.67					
Parts Supplements													Delete All Parts		
Zone - Area	Qty	Make : Model	View Edit	Parts Qty	Parts Make : Model	Install Phase	Tax A B	Unit Sell	Ext Sell						
1 - Basement	1	Linn : Knekt RCU	Q	1 ea	Linn : IR Repeater	2	T T	\$85.00	\$85.00						
1 - Basement	1	Linn : Knekt RCU	Q	1 ea	Linn : Knekt RCU Metalwork	2	T T	\$20.00	\$20.00						
1 - Basement	1	Linn : Melodik	Q	1 ea	Linn : Phono Plugs-Standard	3	T T	\$95.00	\$95.00						
1 - Home Theater	1	Linn : Knekt RCU	Q	1 ea	Linn : IR Repeater	3	T T	\$85.00	\$85.00						
1 - Home Theater	1	Linn : Knekt RCU	Q	1 ea	Linn : Knekt RCU Metalwork	2	T T	\$20.00	\$20.00						
1 - Home Theater	1	Linn : Melodik	Q	1 ea	Linn : Phono Plugs-Standard	3	T T	\$95.00	\$95.00						
Parts Total									\$400.00						
Wire Supplements													Delete All Wire		
Zone - Area	Qty	Make : Model	Class Edit	Bulk Run Type	No Labor	Wire Qty	Wire & Cable Make : Model	Install Phase	Tax A B	Unit Sell	Ext Sell				
1 - Basement	1	Linn : 5101 Personal	Q	Bulk	Home	150 m	Linn : K10 Cable	3	T T	\$5.00	\$750.00				
1 - Basement	1	Linn : 5125	Q	Pre-Cut		1 pr	Linn : Black Interconnect	3	T T	\$120.00	\$120.00				
1 - Basement	1	Linn : 5125	Q	Pre-Cut		1 pr	Linn : Black Interconnect	3	T T	\$120.00	\$120.00				
1 - Basement	1	Linn : 5125	Q	Pre-Cut		1 pr	Linn : Black Interconnect	3	T T	\$120.00	\$120.00				
1 - Basement	1	Linn : 5125	Q	Pre-Cut		1 pr	Linn : Black Interconnect	3	T T	\$120.00	\$120.00				
1 - Basement	1	Linn : Katan	Q	Bulk	Room	75 ft	Linn : K20 Cable	3	T T	\$2.74	\$205.50				
1 - Basement	1	Linn : Katan	Q	Bulk	Room	75 ft	Linn : K20 Cable	3	T T	\$2.74	\$205.50				
Wire Total									\$6,082.40						

Enhancement-Proposal/Print Menu: Areas & Products with Grand Totals Report

Add the Areas & Products with Totals print button back into the Proposal Print Menu.

Enhancement-Proposal/Parts & Wire Supplements: Unify the Delete and Delete All functions

The Delete All Parts and Wire Supplement buttons on the Supplement and Detail screens now behave in a similar manner and delete the associated Parts & Wire Labor at the same time.

Zone - Area	Qty	Make : Model	View Edit	Parts Qty	Parts Make : Model	Install Phase	Tax A B	Unit Sell	Ext Sell
Atrium	1	Linn : 5101 Personal Handset	Q	1 ea	Linn : Cirkus Kit	2	T T	\$645.00	\$645.00
Atrium	1	Linn : 5101 Personal Handset	Q	2 ea	Linn : Knekt RCU Install Kit	3	T T	\$210.00	\$420.00
Atrium	1	Linn : 5101 Personal Handset	Q	1 ea	Linn : Knekt RCU Metalwork	2	T T	\$20.00	\$20.00

Delete All Parts										= Phantom Product										Proposal - Product Detail - Parts Supplements										1 of 1										Home																																							
Areas		Text		Products		Ann & Bob Traaseth 1292.1-1.100										Proposal Detail																																																															
Labor		Parts		Wire		Tasks		Linn : 5101 Personal Handset Audio : Multi-room : Keypad										Prev Next																																																													
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 Sondex LP12										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									
1 ea										Linn										Knekt RCU Metalwork										Back box										2										12.00										20.00										20.00									

Delete All Wire										= Phantom Supplement										Proposal - Wire Supplements										Adjust Bulk Wire Home Runs										5000 Sq Ft Update										150 ft per Home Run										Done																																																	
Areas		Text		Products		Ann & Bob Traaseth 1292.1-1.100										Wire Detail										Adjust Bulk Wire Room Runs										100 % Update										Wire Manager																																																															
Labor		Parts		Wire		Tasks		Home Entertainment System 1292.1-1.100										Wire Summary										Itemized Wires = Yes										Wire Total: \$1,312.50																																																																							
All Areas										Wire Supplements										Itemized Wires = Yes										Wire Total: \$1,312.50																																																																															
Zone - Area										Qty										Make : Model										Class										Bulk Run Type										Wire Qty										Wire & Cable Make : Model										No Labor										Install Phase A B										Unit Sell										Ext Sell									
Atrium										1										Linn : 5101 Personal										Bulk										Home										150 m										Linn : K10 Cable										1										T T										\$5.00										\$750.00									
Atrium										1										Linn : 5101 Personal										Bulk										Home										150 ft										Monster : 16/2 Spkr Wire										1										T T										\$0.45										\$67.50									
Atrium										1										Linn : 5101 Personal										Bulk										Room										75 ft										Monster : MVQUAD-B DB										1										T T										\$1.80										\$135.00									
Atrium										1										Linn : 5101 Personal										Pre-Cut																				1 pr										Linn : Black Interconnect										3										T T										\$120.00										\$120.00									
Atrium										1										Linn : 5101 Personal										Pre-Cut																				1 pr										Linn : Black Interconnect										3										T T										\$120.00										\$120.00									
Atrium										1										Linn : 5101 Personal										Pre-Cut																				1 pr										Linn : Black Interconnect										3										T T										\$120.00										\$120.00									

Delete All Wire										Restore Wire Prices										Proposal - Product Detail - Wire Supplements										1 of 1										Home																																																																					
Areas		Text		Products		Ann & Bob Traaseth 1292.1-1.100										Proposal Detail																																																																																													
Labor		Parts		Wire		Tasks		Linn : 5101 Personal Handset Audio : Multi-room : Keypad										Prev Next																																																																																											
Product		Specs		Pix - PDF's		Labor		Parts		Wire		Tasks		Atrium																																																																																															
Wire Make										Model										Wire & Cable										Only products classified as "Wire" can be added Wire & Cable are Itemized																																																																															
Class										Bulk Run Type										No Labor										Total Qty										Wire Make										Model										Description										Phase										Unit Cost										Unit Sell										Ext Sell									
Bulk										Home																				150 M										Linn										K10 Cable										Loudspeaker cable										1										3.00										5.00										750.00									
Bulk										Home																				150 ft										Monster										16/2 Spkr Wire										2 Conductor Speaker										1										0.15										0.45										67.50									
Bulk										Room																				75 ft										Monster										MVQUAD-B DB EZ500										RG6 Direct Burial										1										0.60										1.80										135.00									
Pre-Cut																														1 pr										Linn										Black Interconnect										Pair of phono-phono										3										72.00										120.00										120.00									
Pre-Cut																														1 pr										Linn										Black Interconnect										Pair of phono-phono										3										72.00										120.00										120.00									
Pre-Cut																														1 pr										Linn										Black Interconnect										Pair of phono-phono										3										72.00										120.00										120.00									

Enhancement –Proposal/Areas &Products/Labor: Adding Labor Category Notice

When adding a new Labor Category to a Product in a Proposal you will now be notified when you have used all of your Labor Categories up. In that case you would simply add more Labor time to an existing Labor Category.

Delete All Labor Primary Phase: 3 Final Proposal - Product Detail - Labor Supplements 2 of 14 ? Home									
Mike & Jessica Potter 1282.1-1.100				Alt Labor View		Labor Sub Cats		Proposal Detail	
Linn : Katan Audio : Speaker : Bookshelf				Prev Next					
Product	Specs	Pix - PDF's	Labor	Parts	Wire	Tasks	1 - Basement		
Add Labor Supplement Total Labor for All Phases (1+2+3) Extended Qty = 5 pr Refresh up dn									
Labor Type	Cost	Sell	Unit w/DOD	Time	Ext w/DOD	Cost		Sell	
						Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD
1 - Installation	\$30.00	\$60.00		0:20:00	1:40:00	\$10.00	\$50.00	\$20.00	\$100.00
2 - Programming	\$40.00	\$80.00		0:10:00	0:50:00	\$6.67	\$33.33	\$13.33	\$66.67
5 - Wire Labor - Bulk	\$39.00	\$60.00		0:37:30	3:07:30	\$21.88	\$109.38	\$37.50	\$187.50
Total Phase 1+2+3 Labor:				1:07:30	5:37:30	\$38.54	\$192.71	\$70.83	\$354.17

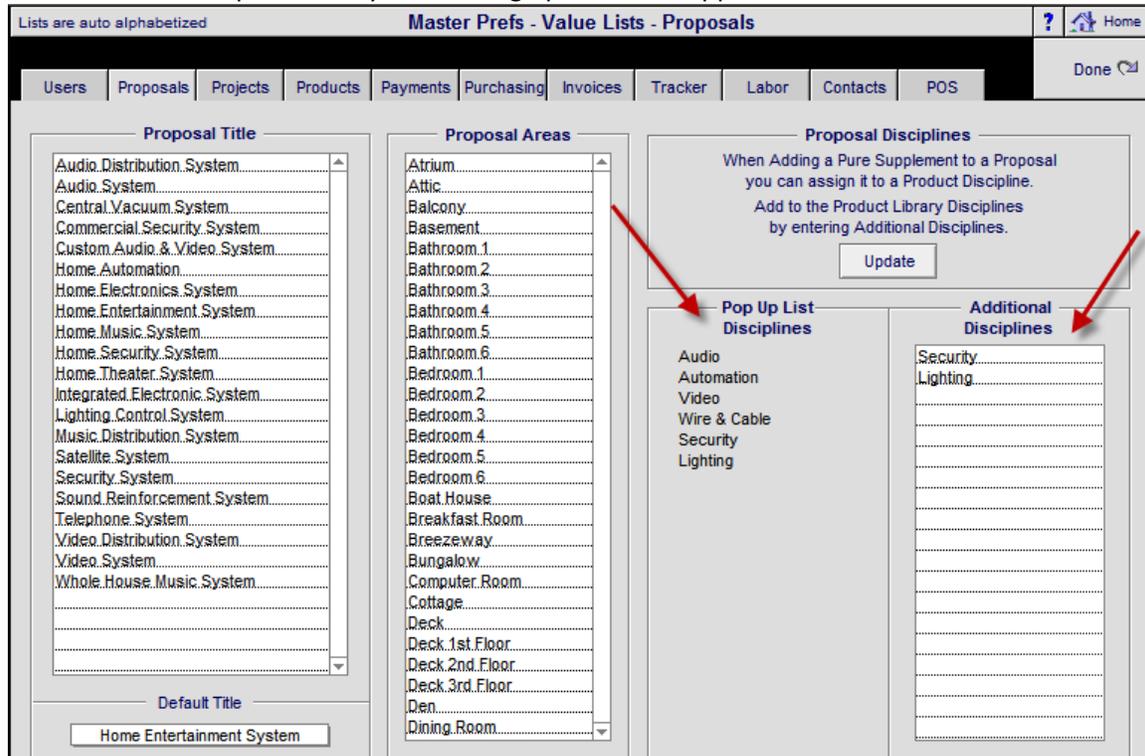
Enhancement –Product Library/Group Utility: Select Disciplines from Groups and Library

You can now select a Discipline from the Product Groups as well as the Product Library and this will filter the Group list. The Groups with Products Indicator (Y/N) has been added to all Group portals.

Edit Product Groups Product Library - Product Group Utility 1 of 152 ? Home						
Assign a new Discipline to this Product						
Klipsch RC-35 Center Channel Speaker						
Audio : Speaker : Center Channel						
Classification	Pick	Discipline	Category	Type	Class	Phase Prods
Product		Audio	Amplifier	Integrated Amplifier	Product	3 N
Primary Install Phase		Audio	Amplifier	Multi-channel	Product	3 Y
3 Final		Audio	Amplifier	Preamplifier	Product	3 Y
Primary Install Phase Product Override		Audio	Amplifier	Single Channel	Product	3 Y
		Audio	Amplifier	Small Amp	Product	3 N
		Audio	Amplifier	Stereo	Product	3 Y
		Audio	Amplifier	Stereo Receiver	Product	3 N
		Audio	Amplifier	Surround Processor	Product	3 Y
		Audio	Amplifier	Surround Receiver	Product	3 Y
		Audio	Control	Multi-channel	Product	3 Y
		Audio	Misc	Final Part	Part	3 Y
		Audio	Misc	Prewire Part	Part	1 N

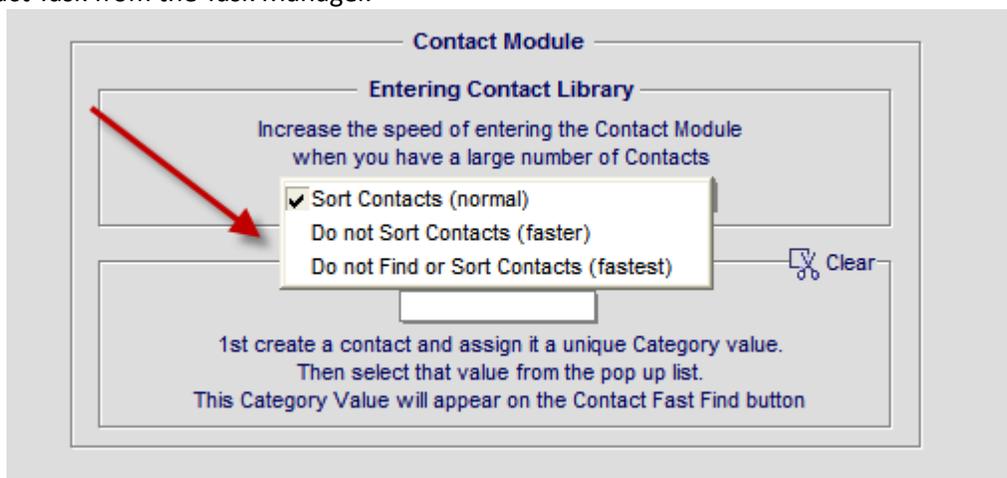
Enhancement-Master Prefs/Lists/Proposals: Additional Disciplines

When adding Pure Labor, Parts & Wire supplements to a Proposal you can assign a Discipline to these supplements. Normally these disciplines come from your Product Groups, but now you add additional Disciplines that you can assign pure labor supplements to.



Enhancement-Master Prefs/Other/Misc 1: Increase speed entering Contact Module

If you have a large number of Contacts in your Contact Library you can now speed up entering the Contact Library by changing this Master Prefs/Other/Misc 1 setting to fast or fastest. This new feature works when entering Contact from the Main Logo screen, the POS module, Adding a New Proposal, the Quick View feature on the Proposal Detail screen and when creating a Contact Task from the Task Manager.



Fix-Master Prefs & Product Labor: Display Default Labor Sell

The Default Labor Rate now displays properly in the Master Prefs/Labor and Product Library/Labor screens.

Group Assigned Labor					
Audio : Speaker : Center Channel Classification: Product Primary Install Phase: 3 Final					
Labor Categories <small>Labor Sub Categories</small>	Default Labor Rate	Group Labor Time (hrs:min:sec)			Engage Manual Labor Override
		Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	
1 - Installation	\$100.00	0:00:00	0:00:00	0:20:00	Apply DOD 2 Avg 10%
					Apply DOD 3 Avg 50%
Total Labor Time		0:00:00	0:00:00	0:20:00 =	Total hrs:min:sec
Total Labor Amount				\$33.33 =	

Fix - Proposal/Project screen: Reset Project Labor Prefs to Master Prefs

The Reset Project to Master Prefs routine now updates all 5 Rate Structures in your Proposal.

Reset Project to Master Prefs

Proposal - Project
Hayes Callahan

Client: Home Entertainment System
Project: 1290.1-1.100

Proposal-Project Title: Home Entertainment System

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

Hourly Labor Rates

Rate Structures	Labor Categories	Sell	Cost
<input checked="" type="radio"/> 1 Basic Rate	Installation	100.00	30.00
<input type="radio"/> 2 Inner City Rate	Programming	75.00	40.00
<input type="radio"/> 3 Prewire only	Training	60.00	50.00
<input type="radio"/> 4	Parts Labor	50.00	20.00
<input type="radio"/> 5	Wire Labor - Bulk	60.00	35.00
	Wire Labor - Precut	60.00	40.00

Labor Degree of Difficulty

Building Type: Frame
Number of Floors: 1
Project Difficulty: 0 %

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

Wire and Cable Supplements

Building Size: 5000 square feet

Bulk Home Run - Avg Wire Length: 150 per Home Run
Bulk Room Run - Avg Wire Length: 75 per Room Run

Itemize each Wire & Cable entry: Yes No

Message
Reset, Hourly Labor Rates, to the Master Prefs Default settings.
Reset Labor Cancel

Fix-Proposal/Areas & Products/Pure Supplements: Adding new Supplement Disciplines

When adding a new Supplement Discipline the Area that the Discipline as originally added to stays selected so that you can easily add more labor to it and to prevent it from getting added to another Area accidentally.

Proposal - Pure Labor Supplements ?

Mike & Jessica Potter

Security System
1282.1-1.100

1. Pick an Area
2. Pick or Add a Discipline
3. Add Labor
4. Pick Discipline to View Labor

Done

Areas	Text	Products			
Labor	Parts	Wire	Tasks		

Areas

Pick Zone - Area

Zone 1 - Basement
Zone 1 - Home Theater

Pure Labor | Pure Parts | Pure Wire

Add Discipline Disciplines in Zone 1 - Basement Refresh

Pick	Discipline		Delete
	Audio	Supplemental : Items	
	Video	Supplemental : Items	

Products in Zone 1 - Basement

Make	Model	Phase
Linn : 5125		
Audio : Five channel power amplifier (Black)		3
Linn : Katan		
Audio : Bookshelf loudspeakers: pair		3
Linn : Melodik		
Audio : Aktive isobarik bass extension		3
Runco : CL-610		
Video : DLP Projector		3

Pure Supplement Labor in Zone 1 - Basement : Video Discipline

Add Labor

Labor Type	Notes	Hrly Rate	Phase 1	Phase 2	Phase 3	Total (h:m:s)	Delete
Programming		\$80.00		07:00:00		= 7:00:00	
Total Labor Time:				7:00:00		= 7:00:00	
Total Labor Time with DOD:			0:00:00	7:00:00	0:00:00	= 7:00:00	
Total Labor Sell:				\$560.00		= \$560.00	

Fix -Proposal/Print Menu: Labor Summary Report – Print 1 page

The Labor Summary Report now prints only 1 page as it should. We have also removed the Refresh Reports pop up message.

Supplements

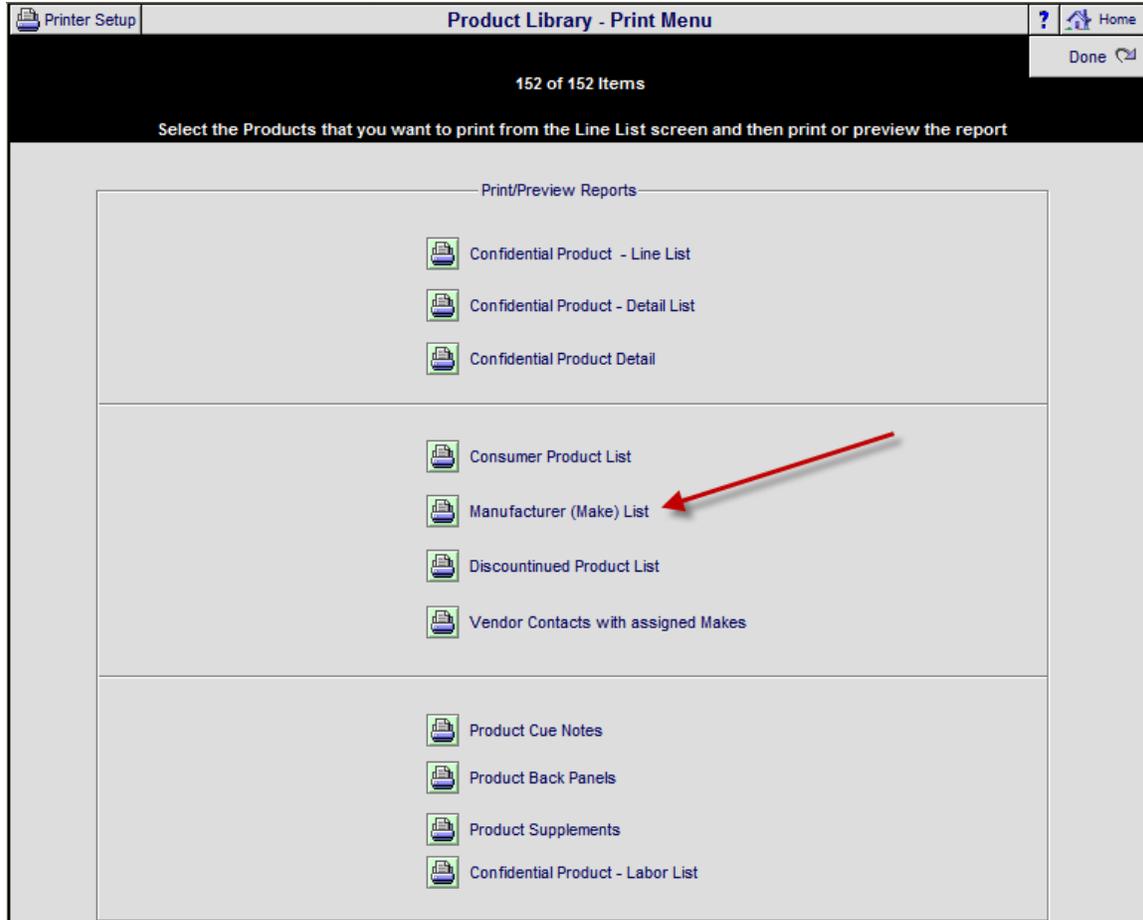
- Labor Summary
- Labor Detail List

- Parts Summary
- Parts Detail List

- Wire & Cable Summary
- Wire & Cable Detail List

Fix –Product Library/Print Menu/Print Makes List Report: Add Set Makes into Routine

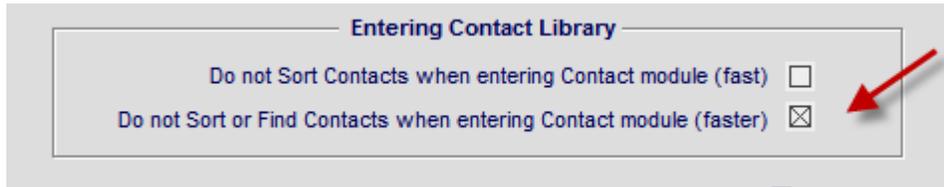
Before printing a List of all Product Makes you will now be asked to run the Set Makes routine so that all unique Makes are found and tagged properly for the report. The Print Menu layout has been improved for better clarity.



**SCPS Version 8.4v1
Released: 9/7/2011**

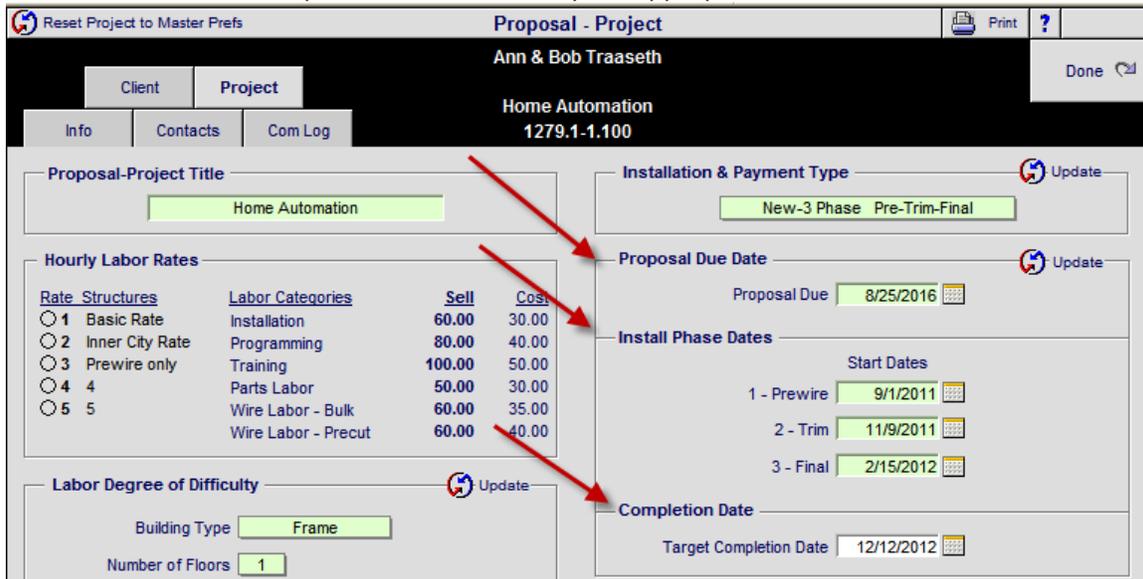
Enhancement-Master Preferences/Other/Misc 1: Speed up entering Contacts

Checking this box turns off the Finding of Contacts and the Sorting process when entering the Contact Library and speeds up the process. This is helpful when you have a large number of Contacts and slower networks.



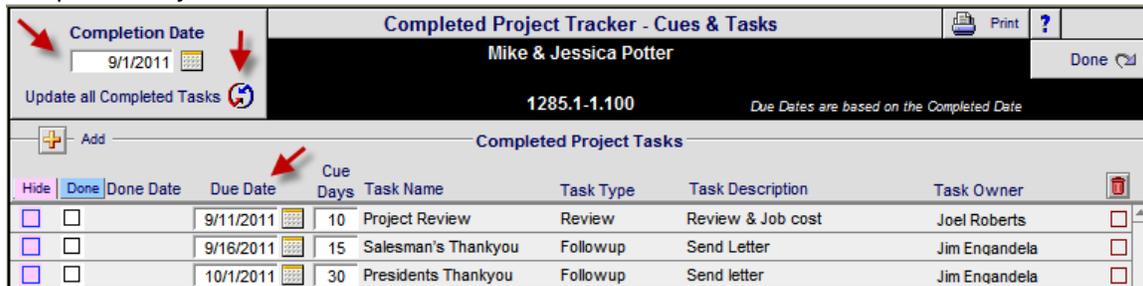
Enhancement-Proposal/Project/Completed: New Tracker Section

The Tracker section on the Project screen in Proposals, Projects and Completed Projects has been consolidated all in one location. This section includes the Proposal Due Date, Installation Phase Dates and the Completed Date where they are appropriate.



Enhancement-Completed Project/Tracker: Update All Completed Tasks

You can now Auto Update All Completed Tracker Task Dates from the Tracker screen within the Completed Project.



Enhancement-Project/Change Orders: Final CO's now displays Finalized date

Final CO's now displays the date the CO was Finalized instead of when the Pending CO was created.

Master Project - Current Change Orders								Print	?	Home
John & Mary Smith								Project List		Master Project
Home Entertainment System 1284.1-1.100										
Current Change Orders										
View	Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance Due	Del		
	Final	9/12/2006	1284.1c1-1.100	Home Entertainment System	\$13,805.86		\$13,805.86			
	Final	9/12/2006	1284.1c2-1.100	Home Entertainment System	\$26,492.37		\$26,492.37			

Enhancement-Contacts/Utility: Delete Duplicate Contacts

A new utility will find and check all of the Contacts in your Contact Library that have the same Favorite Name, Company and Phone number. You will have the option to check/uncheck these contacts before deleting them. This utility will not delete contacts that have Proposals, Projects or POS entities associated with them. It is always wise to backup your SCPS data before mass deletions as these changes cannot be reversed.



Find Contacts Fav A B C Contact Library - List View Utility ? Home

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

Clients Users Other Views Vendors Locations Contractor 21920 of 40079 Contacts New Contact Leave Print Menu

Add Entity	Add Task	Entities View	Fav Name	Company	Category	Fav Phone	Info Fav	Del
			Bastian, Kathleen		Contact New	(H) 939-8272		
			Bastian, Mark		Contact New	(H) 939-8272		
			Bastian, Mark		Contact New	(H) 939-8272		
			Bastian, Mark		Contact New	(H) 939-8272		
			Bastian, Mark		Contact New	(H) 939-8272		
			Wardlow, Warren & Annemar		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Wardlow, Warren & Annemarie		Contact New	(H) 939-8307		
			Howell, Bill		Contact New			
			Howell, Bill		Contact New			
			Dial, Danita		Contact New			
			Sielauff, Jenna		Contact New			
			Spriggs, David		Contact New			
			Spriggs, David		Contact New			

Message

This Utility will find and tag all of the Duplicate Contacts in your library. You can then review them and uncheck the ones that you want to keep and Delete them all using the Delete icon at the top of the list.

Contact that have Entities (Proposals, Projects, POS) or that are Users or Locations will not be checked or deleted.

It is always wise to make a backup of your SCPS data before mass deletions.

Continue Cancel

Enhancement-Master Tracker: Change Install Dates from Tracker and Project

Changing the date of an Install Phase Milestone for a Project or a Final Change Order changes the dates of all of the Tasks associated with the Install Phase. This can be done from within the Master Tracker by clicking on the date or calendar icon or from within the Project or Change Order - Tracker screen. When you change the date you can choose Full Auto to automatically update the remaining Install dates based on the tracker default days and update all of the associated tasks. Or you can select Semi Auto to only change all of the associated tasks. Or you can Cancel and leave the dates as they are or as you have manually changed them.

Project Tracker - Install Phase Dates
Mike & Jessica Potter
Security System
1282.1-1.100

Install Phases - Start Dates

- 1 - Prewire
- 2 - Trim
- 3 - Final
- Project Completion

Done Options

- Done Full Auto**
 Retain Changed Install Dates
 Auto Update - Remaining Phase Dates
 Auto Update - Related Tracker Task Dates
- Done Semi Auto**
 Retain Changed Install Dates
 Do not Auto Update - Remaining Phase Dates
 Auto Update - Related Tracker Task Dates
- Done/Cancel Manual**
 Retain Current Install Dates
 Do not Auto Update - Remaining Phase Dates
 Do not Auto Update - Related Tracker Task Dates

Default Install Start Dates are based on the Project Sold date 8/24/2011, plus the Default Install Milestone Cue Days for each Phase.

Enhancement-Master Tracker: Milestone shading and selection

All Proposal, Project, Change Order and Completed Milestones now have a green shading behind them and you can show all and only the Milestones with the All Milestones button.

Find Items		Show All		Proposals		Master Tracker		Milestones		Util		Home	
New Task		Past Today		Projects & CO's		Tuesday August 30, 2011		Proposals Due		Gantt		Leave	
New Appointment		This Week		Change Orders		User: Jim Engandela		Install Phases		Calendar		Email All	
		This Month		Completed		23 Items 221 Total		Payments Due		Tracker		Print Menu	
		Next Month		Tasks				Purchasing Due					
				Appointments				All Milestones					
Adm	View	Due Date	Tracker Item	Proposal Project	Item Owner	Total Labor							
Mar	Detail	Month - Day	Item Name	Client - Company	Email	32:35							
User	Done	Appoint Time	Description	Proposal/Project Title	Status/Notes	Total Pymts							
						\$53,442.79							
		12/25/2013 Dec - Wed	CO Milestone - Payment Payment Phase 1 - Prewire - Payment	1282.1c1-1.100 Mike & Jessica Potter Home Entertainment System	Sandy Engandela No email	\$687.82							
		12/25/2013 Dec - Wed	CO Task - Purchasing Purchase Prewire Products Create PO's for Prewire Phase	1282.1c1-1.100 Mike & Jessica Potter Home Entertainment System	Joel Roberts No email								
		1/4/2014 Jan - Sat	CO Milestone - Install Install Hours Phase 1 - Prewire - Installation	1282.1c1-1.100 Mike & Jessica Potter Home Entertainment System	Jim Engandela No email	0:37							
		1/24/2014 Jan - Fri	CO Task - Purchasing Purchase Trim Products Create PO's for Trim Phase	1282.1c1-1.100 Mike & Jessica Potter Home Entertainment System	Joel Roberts No email								
		1/25/2014 Jan - Sat	Project Milestone - Payment Payment Phase 1 - Prewire - Payment	1282.1-1.100 Mike & Jessica Potter Security System	Sandy Engandela No email	\$17,584.99							

Fix-Proposal Pricing: Price Adjust now refreshes Pricing numbers for correct values.

When using the Price Adjuster Utilities the Proposal Pricing numbers are now refreshed so they reflect the proper values instead of having to leave the Pricing screen and reentering it.

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

Ann & Bob Traaseth Done

Home Automation
1279.1-1.100

Excluded Products Totals Labor Meter

Proposal - Pricing Show Discount yes no
Show Sales Tax yes no

Subtotals	Sell	GP%	Cost	Profit	Discount	Total Labor Time
Equipment	\$23,299.95	40.2%	\$13,940.40	\$9,359.55	-\$100.00	26:12:30
Installation	\$1,858.33	46.6%	\$992.71	\$865.62		
Misc. Parts	\$1,285.00	40.2%	\$768.00	\$517.00		
Wire & Cable	\$4,353.70	42.1%	\$2,522.22	\$1,831.48		
Additional Fees	\$2,091.36	50.0%	\$1,045.68	\$1,045.68		
Total	\$32,888.34	41.4%	\$19,269.01	\$13,619.33		
Tax	\$1,693.83					
Grand Total	\$34,582.18					

\$32,988.34 List Price
-\$100.00 Courtesy Discount
\$32,888.34 Total

Proposal Equipment - Price Adjuster

Adjust Prices by individual Products Set All Prices to Minimum Sell Reset All Prices to Original Sell Refresh

Adjustment Type: Adjust Sell Price Set All Prices to Adjustment Set Sell Price Adjustment based on \$ Amount

Percentage %: + \$

Global Price Adjustments will be applied to all Equipment in this Proposal except those products that are checked "Do Not Discount"

Global Adjustments will override all Individual Equipment Price Adjustments

To selectively Adjust Prices by Group, Make, Model, Area or Phase, Click "Adjust Prices by Product" button

If a product has a List price, the discount will be the difference between the List price and the Sell price.

If a product does not have a List price, the discount will be the difference between the Original Sell Price and Adjusted Sell price.

Fix – Proposal/Pricing/Labor Rates: Display Hourly Rates on Supplements for Labor Rate 4 & 5

When selecting Labor Rate 4 or 5, SCPS now displays the Hourly Labor rates on the Labor Supplement screens as it does for Labor Rates 1,2 and 3.

Reset Rates to Master Pref **Proposal - Labor Rates** ? Done

David Bailey

Video Distribution System
6056.1-1.djy

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 T&M Install
 5 T&M Discount

Labor Categories	Hourly Rate 1 Basic Rate		Hourly Rate 2 Inner City Rate		Hourly Rate 3 Prewire only		Hourly Rate 4 T&M Install		Hourly Rate 5 T&M Discount	
	Sell	Cost	Sell	Cost	Sell	Cost	Sell	Cost	Sell	Cost
1 - Installation	\$60.00	\$35.00	\$80.00	\$40.00	\$30.00	\$15.00	\$75.00	\$35.00	\$60.00	\$35.00
2 - Programming	\$75.00	\$35.00	\$100.00	\$50.00	\$30.00	\$15.00	\$75.00	\$35.00	\$60.00	\$35.00
3 - Training	\$75.00	\$35.00	\$120.00	\$60.00	\$25.00	\$15.00	\$75.00	\$35.00	\$60.00	\$35.00
4 - Parts Labor	\$45.00	\$35.00	\$60.00	\$30.00	\$25.00	\$15.00	\$75.00	\$35.00	\$60.00	\$35.00
5 - Wire Labor - Bulk	\$35.00	\$25.00	\$70.00	\$35.00	\$25.00	\$15.00	\$75.00	\$35.00	\$60.00	\$35.00
6 - Wire Labor - Precut	\$60.00	\$35.00	\$70.00	\$35.00	\$25.00	\$15.00	\$75.00	\$35.00	\$60.00	\$35.00

Fix – Proposal/SuperView: Reset Product Portal Sort Order to Match Areas & Products screen.

Reset Product Portal Sort Order to Match Areas & Products screen.

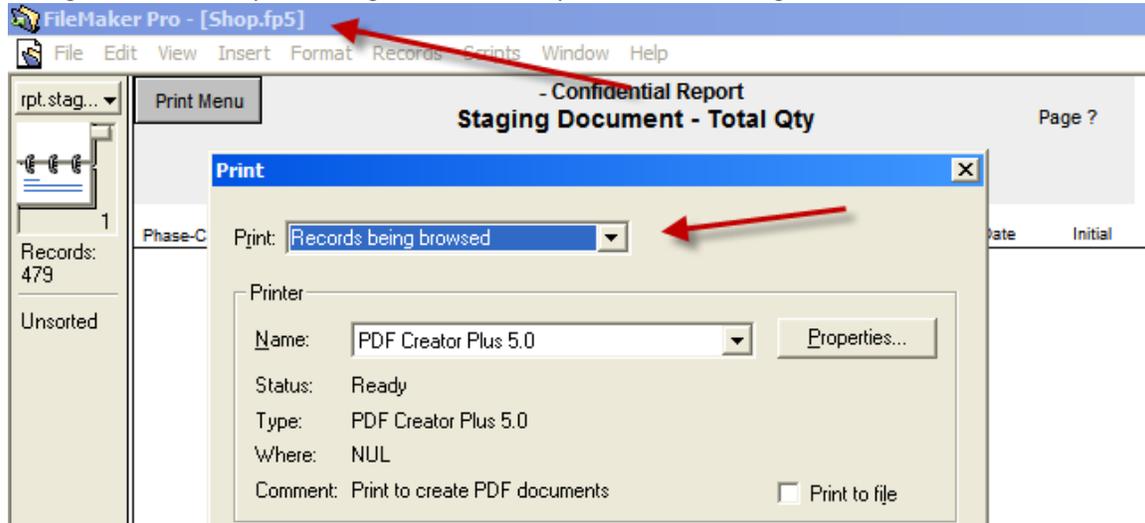
Area Sort = Location/Zone/Place/Area

Product Sort=Discipline/Place/Make/Model

Turn Off “Sort by Discipline” in the Print Options, to sort by Place/Make /Model

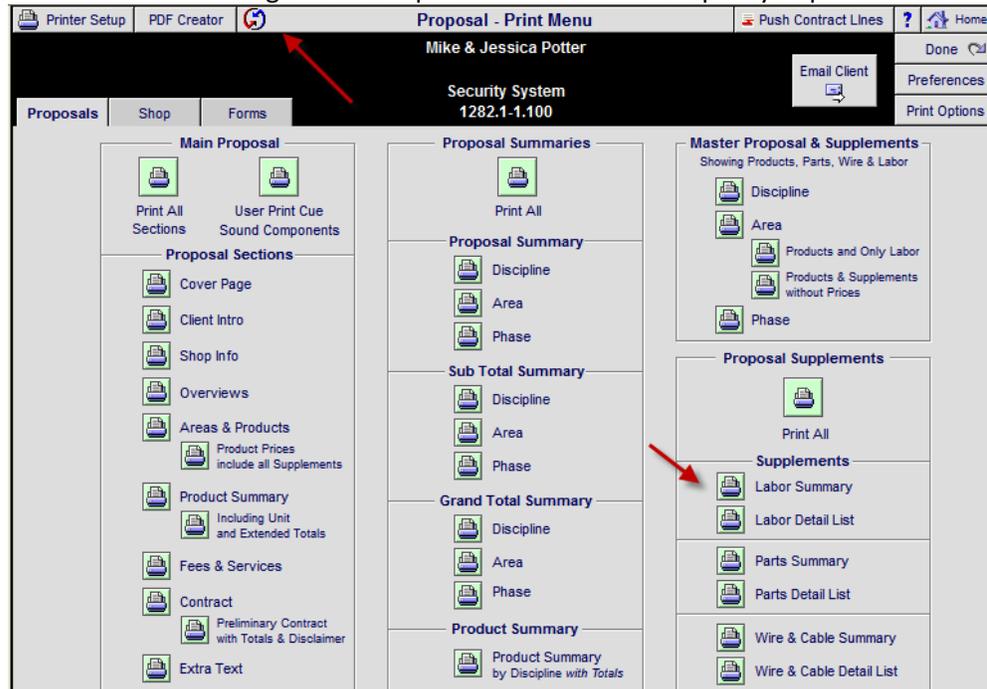
Fix – Proposal /Print Menu/Shop: Change Print Output to Browse from Print Script

Change the Print Output setting from Print Script to Records being browsed.



Fix – Proposal /Print Menu: Add Report Refresh button to screen and to single record reports

The Report Refresh button finds all Proposal records after printing a single record report and is now included in all single record reports so that the next report you print shows all records.



Fix-Master Tracker: Changing Change Order Dates

Changing a Change Order Date now Auto Updates all of the Change Order Tasks and Milestones associated with that CO.

Fix-Completed Project/Tracker: Change Task Dates with Calendar icon

You can now use the Calendar to change the Completed Project Task Dates

Completion date		9/12/2006		Completed Project Tracker - Cues & Tasks					Print	?	
Mike & Jessica Potter											Done
1287.1-1.100											Due Dates are based on the Completed Date
Completed Project Tasks											Update
Hide	Done	Done Date	Due Date	Cue Days	Task Name	Task Type	Task Description	Task Owner			
<input type="checkbox"/>	<input type="checkbox"/>		9/27/2006	15	Salesman's Thankyou	Followup	Send Letter	Jim Engandela	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		8/18/2011	30	Presidents Thankyou	Followup	Send letter	Jim Engandela	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		9/22/2006	10	Project Review	Review	Review & Job cost	Joel Roberts	<input type="checkbox"/>		

Fix-Final Change Order/Tracker: Change Dates and update all Tracker Milestones and Tasks

You can change the date on all Final Change Order Tracker Dates.

CO Tracker - Install Phase Milestones		Project Sold Date: 8/19/2011							?																															
John & Mary Smith											Done																													
1284.1c1-1.100											Master Tracker																													
Install Phase Milestones																																								
New-3 Phase Pre-Trim-Final																																								
Done	Phase	Phase Date	Install Milestones				Owner																																	
<input type="checkbox"/>	1	9/16/2011	Phase 1 - Prewire - Installation				Jim Engandela																																	
<table border="0"> <tr> <td colspan="2">Payments</td> <td colspan="2">Purchasing</td> <td colspan="2">Installations</td> <td colspan="2">Invoicing</td> <td colspan="2"></td> </tr> <tr> <td><input type="checkbox"/></td> </tr> <tr> <td>Sent</td> <td>Rcvd</td> <td>Ordered</td> <td>All Rcvd</td> <td>Scheduled</td> <td>Completed</td> <td>Sent</td> <td>Paid</td> <td colspan="2"></td> </tr> </table>											Payments		Purchasing		Installations		Invoicing				<input type="checkbox"/>	Sent	Rcvd	Ordered	All Rcvd	Scheduled	Completed	Sent	Paid											
Payments		Purchasing		Installations		Invoicing																																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																															
Sent	Rcvd	Ordered	All Rcvd	Scheduled	Completed	Sent	Paid																																	
<input type="checkbox"/>	2	10/13/2011	Phase 2 - Trim - Installation				Jim Engandela																																	
<table border="0"> <tr> <td colspan="2">Payments</td> <td colspan="2">Purchasing</td> <td colspan="2">Installations</td> <td colspan="2">Invoicing</td> <td colspan="2"></td> </tr> <tr> <td><input type="checkbox"/></td> </tr> <tr> <td>Sent</td> <td>Rcvd</td> <td>Ordered</td> <td>All Rcvd</td> <td>Scheduled</td> <td>Completed</td> <td>Sent</td> <td>Paid</td> <td colspan="2"></td> </tr> </table>											Payments		Purchasing		Installations		Invoicing				<input type="checkbox"/>	Sent	Rcvd	Ordered	All Rcvd	Scheduled	Completed	Sent	Paid											
Payments		Purchasing		Installations		Invoicing																																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																															
Sent	Rcvd	Ordered	All Rcvd	Scheduled	Completed	Sent	Paid																																	
<input type="checkbox"/>	3	11/12/2011	Phase 3 - Final - Installation				Jim Engandela																																	
<table border="0"> <tr> <td colspan="2">Payments</td> <td colspan="2">Purchasing</td> <td colspan="2">Installations</td> <td colspan="2">Invoicing</td> <td colspan="2"></td> </tr> <tr> <td><input type="checkbox"/></td> </tr> <tr> <td>Sent</td> <td>Rcvd</td> <td>Ordered</td> <td>All Rcvd</td> <td>Scheduled</td> <td>Completed</td> <td>Sent</td> <td>Paid</td> <td colspan="2"></td> </tr> </table>											Payments		Purchasing		Installations		Invoicing				<input type="checkbox"/>	Sent	Rcvd	Ordered	All Rcvd	Scheduled	Completed	Sent	Paid											
Payments		Purchasing		Installations		Invoicing																																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																															
Sent	Rcvd	Ordered	All Rcvd	Scheduled	Completed	Sent	Paid																																	

SCPS Version 8.3v2
Released: 08/17/2011

Enhancement – Proposal and Change Order Print Margins: Remove set layout margins

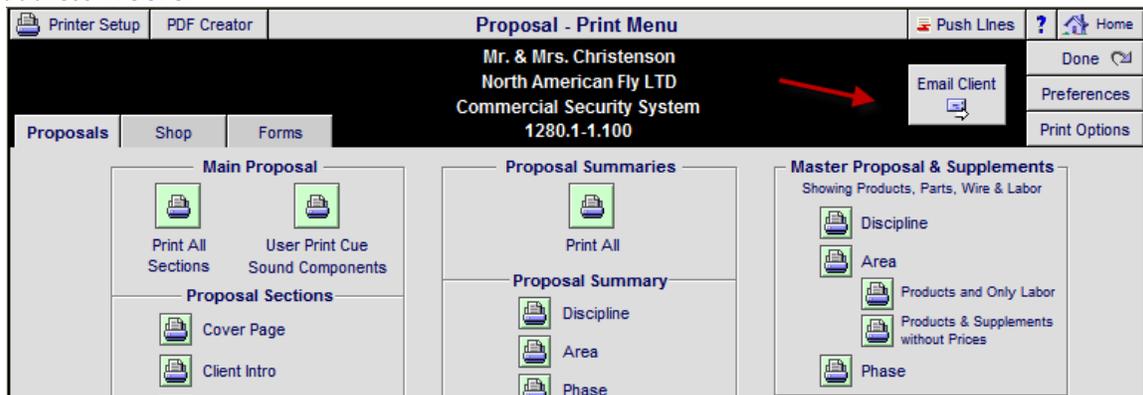
The fixed FileMaker layout margins have been removed from all of the Proposal Print Menu reports enabling the margins to be established by your printer. This improves the printing of complex reports such as the Proposal Contract and many other reports.

Enhancement – Proposal and Change Order Totals: Total Underlines

All of the total underlines (subtotal, tax total, grand total) have been darkened so that they print better and are more legible.

Enhancement – Proposal/Project Print Menu: Email client button

You can now email your client directly from the Print Menu if the client/contact has a valid email address in SCPS.



Enhancement – Project Change Order Headers: New Pending & Final CO Print Headers

The layout of the Pending and Final Change Order headers has been improved to look more like the Proposal headers.

Pending Change Order 1284.1c1-1.100	EME audio & video	Date 8/17/2011
	Home Entertainment System Change Order for John & Mary Smith	
		Qty Ext. Price
Zone 2 - Living Room		
Audio		
Klipsch : RSW-10 : Reference Subwoofer : Black Ash	1 ea	1,000.00
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	2 ea	9,900.00
	Equipment	10,900.00
	Installation	390.00
	Misc. Parts	285.00
	Wire & Cable	956.25
ZONE 2 - LIVING ROOM		12,531.25

Final Change Order
1284.1c2-1.100



Date
8/17/2011



Home Entertainment System
Change Order
for
John & Mary Smith

	Qty	Ext. Price
<u>Zone 1 - Home Theater</u>		
Audio		
Linn : Klimax Chakra 500 Twin-BindPost : Klimax two-channel power amplifier : Silver	1 ea	7,995.00
Linn : Classik Musio-S : Integrated CD player/tuner/preamp/power amplifier : Silver	1 ea	1,550.00
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	1 ea	4,950.00
	Equipment	14,495.00
	Installation	235.00
	Misc. Parts	95.00
	Wire & Cable	883.75
	ZONE 1 - HOME THEATER	15,708.75

SCPS Version 8.3v1
Released: 08/17/2011

Enhancement – All Screens: New Screen Shading

All SCPS screens have been lightened one shade for better clarity and ease of viewing.

Enhancement – Proposal/Contract: Improved Look and Printing Consistency

All Master and Proposal Preferences screens have been re-organized for better comprehension.

Users of this version will want to go through their Master Preferences/Proposal screens and fine tune their Contract preferences to get the desired result on their printed Contract.

Existing Proposals can then be updated using the Update Proposal Prefs button on the Print Menu/Preferences screen.

Users of the Custom Proposal Layout module should wait for the 8.4 release before tweaking their layouts.

Extensive work has been done to the Proposal Contract report to improve the look and the translation from preview and printed report to pdf creation.

The final pricing section has been moved to its own page so it will always print without page breaks. Font sizes have been unified on all Proposal Reports and Preference screens.

The Discount and Pricing Expiry options now do not disrupt the Pricing Totals on the right.

A text field has been added below the Payment Terms header for any messages that you wish to include. The Extra Message field has been moved to the bottom of the Contract. These fields are stored in the Master Preferences and Proposal/Print Menu: Proposal Preferences screens.

Electronics & Installation

	Equipment	\$3,355.97
	Installation	\$4,915.00
	Misc. Parts	\$6,510.00
	Wire & Cable	\$8,326.90
	Additional Fees	\$565.06
	Total (Tax not included)	\$23,672.92

\$24,045.81 List Price
-\$372.89 Courtesy Discount
\$23,672.92 Total (Tax not included)

Prices quoted are guaranteed until: 3/24/2011

Payment Terms

Payments must be made on time to proceed to the next phase of the installation.

Deposit	Due when the proposal is accepted and signed.	\$2,367.29
Payment 1	Due 10 days before the installation prewire phase.	\$7,101.88
Payment 2	Due 10 days before the installation trim phase.	\$4,734.58
Payment 3	Due 10 days before the installation final phase.	\$7,101.88
Hold Back	Due at the completion of the installation.	\$2,367.29

Price Guarantee

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. 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.

Please Authorize & Return

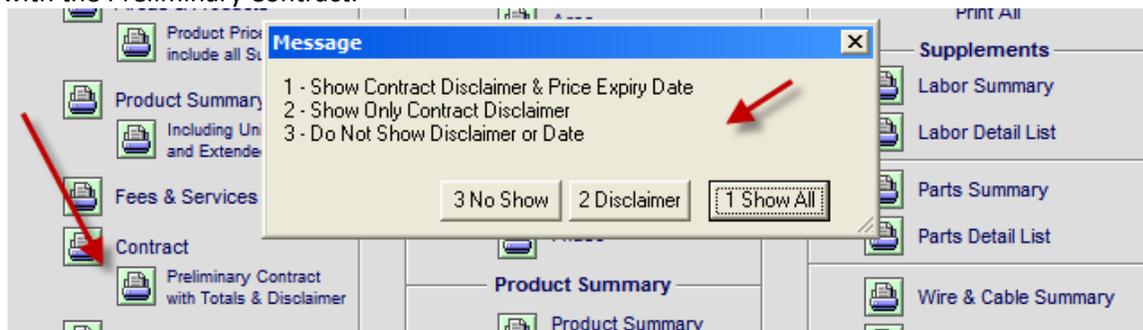
Date: _____ Cecilia Christenson or authorized signature on clients behalf

Date: _____ Jim Engandela, President

Thank you from everyone at EME Audio & Video Systems. Our entire staff stands ready to help you in every way possible to make your purchase an enjoyable experience.

Enhancement – Proposal/Print Menu/Preliminary Contract

A Preliminary Contract has been added that shows each Area with sub-totals and the Proposal Totals at the end of the report. You can choose to show the Contract Disclaimer text and the Price Expiry Date when printing this report. You can also choose to print the Fees report along with the Preliminary Contract.



Zone 1 - Atrium

This area includes the following products and features.

	<u>Qty</u>	<u>Ext. Price</u>
Audio		
Linn : 5101 Personal Handset : Universal learning remote : Black <i>Programmable, high-power, long range, infra-red remote control for hand held or table top operation</i>	5 ea	\$1,088.91
Video		
Sony : SLV-N99 : VHS Video Cassette Recorder <i>The new SLV-N99 VCR is here. You won't believe the quality picture you see as you watch our Reality Regenerator™ picture enhancement circuitry at work. Additional features include an Advanced Quickset™ timer dial with Station ID, VCR Plus+® Gold, a Favorite Channel List with Station ID, and Cable Mouse® Control Capability for cable boxes and satellite receivers. Recording was never so easy.</i>	1 ea	\$179.10
	Equipment	\$1,268.01
	Installation	\$4,417.50
	Misc. Parts	\$5,425.00
	Wire & Cable	\$6,688.50
	Zone 1 - Atrium	\$17,799.01

Electronics & Installation

	Equipment	\$3,355.97
	Installation	\$4,915.00
	Misc. Parts	\$6,510.00
	Wire & Cable	\$8,326.90
	Additional Fees	\$565.06
\$24,045.81 List Price	Total (Tax not included)	\$23,672.92
<u>-\$372.89</u> Courtesy Discount		
\$23,672.92 Total (Tax not included)		

Prices quoted are guaranteed until: 9/30/2011

Preliminary Contract Disclaimer

This document is not an official Contract and is only to be used for reference purposes.

Enhancement – Proposal/Master Prefs and Print Menu Prefs/Preliminary Contract Terms

A new screen has been added to the Master Preferences and Proposal Print Menu Preferences for the Preliminary Contract Terms.

Proposal Prefs - Regular Contract Terms			?	Home
Cover Page	Fees	Contract	Rudy & Cecilia Defiglia	
Client Intro		Terms	Home Entertainment System	
Shop Intro	Extra Pages	Pricing	1298.1-1.100	
			Headers 11 Point Text	Done
			Fields 10 Point Text	Print Contract
			Please stay within field borders	
Contract Pricing Terms				
Custom Installation Contract				
Prices Quoted are	Header	Unless indicated otherwise, Labor and Materials costs identified in this Project Proposal are estimates only, and Client shall be billed for actual Labor and Materials required to complete the project. Client has received and read Definitive Audio's Custom Installation Agreement and Custom Installation Limited Warranty, and agree to their provisions.		
<input checked="" type="radio"/> Estimated <input type="radio"/> Guaranteed	Estimated			
Do not show Contract Pricing Terms	Guaranteed	Products & Installation prices are guaranteed. Total price will not exceed the quoted price.		
		<input type="checkbox"/>		



Preliminary Contract Terms

Proposal Prefs - Preliminary Contract Terms			?	Home
			Cecilia Christenson	
			Wade Realty	
			Home Entertainment System	
			1292.1-1.100	
			Headers 11 Point Text	Done
			Fields 10 Point Text	
			Please stay within field borders	
Preliminary Contract Disclaimer				
Header Message		Preliminary Contract Disclaimer		
		This document is not an official Contract and is only to be used for reference purposes.		

Enhancement – Proposal/Print Menu/Push Lines: Add new push lines options into Contract

The Push Lines Utility has been modified to accommodate the new Contract Layout. By placing carriage returns between Contract sections you can adjust where the page breaks across the Contract content. The Push Lines feature is Proposal specific which means that it enables you to adjust specific Proposals. It is intended to be used to adjust a specific proposal. Use the Master Preferences/Contract Text to make permanent spacing adjustments.

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

Cecilia Christenson
Wade Realty
Home Entertainment System
1292.1-1.100

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

Done

Print Contract

Before the Product & Labor Guarantee

lawsuit is filed. This Custom Installation Agreement shall be governed by the laws of the State of Washington, and venue shall be in the appropriate court located in or nearest to King County, Washington to the extent permissible by law.

Guarantee

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

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

Before the Payment Schedule

Electronics & Installation

Equipment	\$3,355.97
Installation	\$4,915.00
Misc. Parts	\$6,510.00
Wire & Cable	\$8,326.90
Additional Fees	\$565.06
Total (Tax not included)	\$23,672.92

\$24,045.81 List Price
-\$372.89 Courtesy Discount
\$23,672.92 Total (Tax not included)

Prices quoted are guaranteed until: 9/24/2011

Before the Price Terms

Payment Terms

Payments must be made on time to proceed to the next phase of the installation.

Deposit	Due when the proposal is accepted and signed.	\$2,367.29
Payment 1	Due 10 days before the installation prewire phase.	\$7,101.88
Payment 2	Due 10 days before the installation trim phase.	\$4,734.58
Payment 3	Due 10 days before the installation final phase.	\$7,101.88
Hold Back	Due at the completion of the installation.	\$2,367.29

Before the Signatures

Price Guarantee

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. 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.

Please Authorize & Return

Enhancement – Proposal/Project/Print Menu/Shop: Area & Products Reports with Locations

2 Area & Products reports have been added, each one includes the Product Location on each Product. One is sorted by Area/Discipline and the other is sorted by Discipline/Area.

Printer Setup **Proposal - Print Menu - Shop** ? Home

Hayes Callahan

Home Theater System
1283.1-1.100

Proposals **Shop** Forms

Job Costing

- Project Pricing
- Master Project Pricing
- Payment Terms
- Payments & Balances Summary

Subtotal Costing

- Subtotals by Discipline
- Grand Totals by Discipline
- Subtotals by Area
- Grand Totals by Area
- Subtotals by Phase

Installation Utilities

Select Phase

- 1 Prewire
- 2 Trim
- 3 Final

- Staging Document
Products & Parts with Wire Option
- Staging Document
with total quantity (+ - sum)
Products & Parts with Wire Option
- Staging Document by Discipline
with total quantity (+ - sum)
Products & Parts with Wire Option
- Areas & Products
Sort By Discipline and Area
No Prices, with Text and Locations
- Areas & Products
Sort By Area and Discipline
No Prices, with Text and Locations

Project Info

- Client/Project Info
- Project Site Directions
- Project Tax Summary
- Product Warranties
- Product Cut Sheets
- Product Specifications

Project Progress

- Installation Items
Installed vs Remaining to Install

8/16/2011

**EME Audio & Video Systems - Confidential Report
Areas & Products no Prices, with Text
with Product Locations - Sorted by Area/Discipline**

Page 1

Hayes Callahan
Home Theater System
1283.1-1.100

ZONE 1 - HOME THEATER

This area includes the following products and features.

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.

AUDIO

- 1 ea Linn : 5125 : Five channel power amplifier (Black) : Silver
Installation Location Notes for the Linn 5125 Amplifier.
- 5 pr Linn : Katan : Bookshelf loudspeakers: pair : Black
- 1 ea Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black

VIDEO

- 1 ea Runco : CL-610 : DLP Projector
- 1 ea Sony : DVP-NS999ES : Progressive Scan DVD Player : Black

AUTOMATION

- 1 ea Linn : Knekt RCU : Knekt room control unit : White
- 1 ea Linn : 5101 Personal Handset : Universal learning remote : Black

8/16/2011

**EME Audio & Video Systems - Confidential Report
Areas & Products no Prices, with Text
with Product Locations - Sorted by Discipline/Area**

Page 1

Hayes Callahan
Home Theater System
1283.1-1.100

Home Theater System

Audio

- | | |
|------------------|--|
| 1 - Home Theater | 1 Linn : 5125 : Five channel power amplifier (Black) : Silver
<i>Installation Location Notes for the Linn 5125 Amplifier.</i> |
| 1 - Home Theater | 5 Linn : Katan : Bookshelf loudspeakers: pair : Black |
| 1 - Home Theater | 1 Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black |

Video

- | | |
|------------------|--|
| 1 - Home Theater | 1 Runco : CL-610 : DLP Projector |
| 1 - Home Theater | 1 Sony : DVP-NS999ES : Progressive Scan DVD Player : Black |

Automation

- | | |
|------------------|--|
| 1 - Home Theater | 1 Linn : 5101 Personal Handset : Universal learning remote : Black |
| 1 - Home Theater | 1 Linn : Knekt RCU : Knekt room control unit : White |

Enhancement – Proposals/Projects/Pricing Screen: Exclude Products Totals

It is now possible in the Proposal, Project and Change Order Product List screen to Exclude Products from the Totals and to view these totals from the Pricing screen and the Pricing screen Report. The normal Proposal and Project Product Totals are not affected by these Exclusions.

Areas		Text		Products		Install Location Notes		Cecilia Christenson Wade Realty Home Entertainment System 1292.1-1.100		Update All Products	Adjust Selected Prices	Done	
Labor	Parts	Wire	Tasks	Zone - Area	Discipline	Exclude \$ from Totals	Make Category	Model Type	Sell Price Updated	Product Labor Parts Labor Wire Labor	Unit List Min Sell Unit Cost	Adjusted Sell Unit Sell GP%	Extended Sell Ext Installed
				1 ea	Balcony	<input type="checkbox"/>	Linn	5101 Personal Handset		252.50	17.96	17.96	
				2	Audio	<input type="checkbox"/>	Multi-room	Keypad		1,085.00	15.00	19.95	272.45
				2		<input type="checkbox"/>	Universal learning remote	Universal	7/23/2011	1,312.50	5.00	72.2%	-2.00
				1 ea	Cottage	<input type="checkbox"/>	Linn	Akito		165.00	990.00	990.00	
				3	Audio	<input checked="" type="checkbox"/>	Source	Phono			1,100.00	1,265.00	
						<input checked="" type="checkbox"/>	Pick up tonearm	Pick up tonearm :	7/1/2011	325.90	660.00	33.3%	-110.00

Pricing		Labor Rates		Commissions		Cecilia Christenson Wade Realty Home Entertainment System 1292.1-1.100		Print	Home
Tax Summary	Product Tax	Fees Tax	Excluded Products Totals		Proposal - Pricing		Show Discount	Show Sales Tax	
Labor Meter		Total Labor (hrs:min:sec)		63:55:00		Subtotals		Sell GP% Cost Profit Discount	
Equipment		\$3,355.97		54.6%		\$1,524.20		\$1,831.77	
Installation		\$4,915.00		46.9%		\$2,610.42		\$2,304.58	
Misc. Parts		\$6,510.00		40.2%		\$3,894.00		\$2,616.00	
Wire & Cable		\$8,326.90		44.7%		\$4,604.94		\$3,721.96	
Additional Fees		\$565.06		51.2%		\$275.82		\$289.24	
Total		\$23,672.92		45.5%		\$12,909.37		\$10,763.55	
Tax									
Grand Total		\$23,672.92							

Proposal - Excluded Product Pricing		Cecilia Christenson Wade Realty Home Entertainment System 1292.1-1.100		Home
Proposal - Excluded Product Pricing		Excluded Product Subtotals		Sell GP% Cost Profit
Equipment		\$2,365.97		63.5% \$864.20 \$1,501.77
<p>You can choose to Exclude Products from the Grand Totals, in the Proposal/Product screen. Click OK to view these Totals without the Excluded Products.</p>				

1292.1-1.100	Sell	GP%	Cost	Profit	Discount
Equipment	\$3,355.97	54.6%	\$1,524.20	\$1,831.77	-\$372.89
Installation	\$4,915.00	46.9%	\$2,610.42	\$2,304.58	
Misc. Parts	\$6,510.00	40.2%	\$3,894.00	\$2,616.00	
Wire & Cable	\$8,326.90	44.7%	\$4,604.94	\$3,721.96	
Additional Fees	\$565.06	51.2%	\$275.82	\$289.24	
Total	\$23,672.92	45.5%	\$12,909.37	\$10,763.55	-\$372.89
Tax					
Grand Total					

Excluded Product - Totals

1292.1-1.100	Sell	GP%	Cost	Profit
Equipment	\$2,365.97	63.5%	\$864.20	\$1,501.77

You can choose to Exclude Products from the Grand Totals, in the Proposal/Product screen.
 Click OK to view these Totals without the Excluded Products.

Enhancement – Proposal/Areas & Products: Speed Improvement when picking Products
 The speed of Picking Products into a Proposal as been increased by 20%.

Enhancement – Proposal and Project/Tracker: Add All Default Tasks and Delete Tasks
 You can now Add all Default Tasks to a Proposal that does not have them and/or you can Delete all of the Tasks for a Proposal or Project from the Tracker screen in a Proposal or Project.

Hide	Done	Done Date	Due Date	WBS	Type	Task Name	Description	Item Owner
<input type="checkbox"/>	<input type="checkbox"/>		8/11/2011		Task - Discovery	Client Profile	Interview client & complete	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		8/16/2011		Task - Discovery	Walk Through	Gather project details	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		8/18/2011		Task - Review	Design & Engineering	Review client profile with	Jon Oster
<input type="checkbox"/>	<input type="checkbox"/>		8/19/2011		Task - Followup	Send letter to Client	Send Post interview letter to	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		8/21/2011		Task - Review	Sales Review	Review client profile with	Joel Roberts
<input type="checkbox"/>	<input type="checkbox"/>		8/26/2011		Milestone - Proposal	Proposal Due	Present proposal to client	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		8/28/2011		Task - Followup	Send letter to Client	Post proposal letter	Jim Enqandela

Project Tracker - Install Phase Milestones						Project Sold Date: 8/11/2011	?	Home
Mr. & Mrs. Lee & Kris Christenson						Delete all Phases, Payments & Tasks for this Project		Done
North American Fly LTD								Master Tracker
1319.1-1.100								
Install Phase Milestones								
New-3 Phase Pre-Trim-Final								
Hide	Done	Done Date	Phase	Phase Date	Milestones	Owner		
<input type="checkbox"/>	<input type="checkbox"/>		1	9/10/2011	Phase 1 - Prewire - Installation	Jim Engandela		
		Payments		Purchasing		Installations		Invoicing
		Sent Rcvd		Ordered All Rcvd		Scheduled Completed		Sent Paid
<input type="checkbox"/>	<input type="checkbox"/>		2	10/10/2011	Phase 2 - Trim - Installation	Jim Engandela		
		Payments		Purchasing		Installations		Invoicing
		Sent Rcvd		Ordered All Rcvd		Scheduled Completed		Sent Paid

Enhancement – Project/Change Orders: Finalized Change Orders cannot be deleted

Final Change Orders have been approved by the client and become part of the Master Project. They now cannot be deleted and this is how it should be to maintain the integrity of the Master Project. Pending Change Orders can be deleted.

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

Message [X]

Final Change Orders are part of the Master Project and cannot be Deleted.
(Pending CO's can be Deleted)

OK

Enhancement – Master Prefs/Other/Project 1: Global PO Buy Option

A Global PO Buy Option checkbox has been added to the Master Prefs/Other/Projects 1 screen to turn the Global PO Buy Option on/off for the Project Purchase Orders. The status of the Global PO Buy Option is displayed on the Product Library Detail screen and in the Project Purchase Order screens.

Master Prefs - Other - Projects 1

Proposal 1 | **Projects 1** | Products 1 | Misc 1 | 3rd Party 1 | Counters

Proposal 2 | Projects 2 | Products 2 | Misc 2 | 3rd Party 2 | Graphics

Project Purchase Orders & Sales Invoices

Show All Items or Sum Items

Default to Project mode (all Items) when entering the Project SI, PO screens. Otherwise go to the Sum Items mode.

Project Purchase Orders

Enable Global Buy Package Option

Project Purchase Orders will divide the actual Project Qty with the Buy Pkg Qty and show the Qty of Buy Packages and Buy Pkg Cost on the PO.
 Example: Proj Qty (3750) / Buy Pkg Qty (1000 box) = PO Qty (4 rounded up)

- Master Prefs/Other/Project 1: Turn the Global PO Buy Package Option On.
- Product Library: Enter a Buy Pkg, a Buy Pkg Qty, a Buy Pkg Cost and check the PO Buy Option box.

Purchase Orders - All - 2 Products

Mike & Jessica Potter
1293.1-1.100

Phase	Zone - Area	Make : Model	Finish	Vendor?	Qty Sold	Qty Staged	Remaining to Order	Qty to Order	PO's to Date	On Order	Recvd to date	Still on Order
2	Linn : 5101 Personal Handset	Black	Linn		9 ea		8		1	1		0
	5101 Fuses					12						
3	Sony : SLV-N99		Linn		2 ea		0		2	2		0
	VHS Video					7						

Buy Package Option ? **Enable** Global Buy Pkg On

Buy Pkg Buy Pkg Qty ea Buy Pkg Cost

Enhancement – Project/Change Order: Change Only Product, not Supplement Option

When changing the Qty of a Product, in a Project Change Order, you now have the option to change the Product and its Supplements (like normal) or to change Only the Product Qty and not its Supplements.

Change Order - Areas & Products

Hayes Callahan
Home Entertainment System
1300.1-1.100

CO Status: C = Changed, A = Added, D = Deleted

Master Project

Pick Area	Location	Zone	Areas	Q	Add Product to this Area	Change Product Qty	Status	Qty	Unit Sell
	0	Atrium				Audio	C	1 ea	Linn : 5101 Personal Handset
						Multi-room : Keypad			Universal learning remote
									\$199.00

Shop Notes

Message

Change the Product and it's Supplements
or
Only the Product Qty

Cancel Prod Only All

Enhancement – Project/Wire Manager: Improved screen GUI

The Wire Manager screen has been improved for better comprehension and use. The Product Discipline, Make and Model fields have been opened up enabling you to click on them to see all of the data contained in those fields.

Assign a Main Location to Wire Ends		Default Sort = Discipline		Proposal - Wire Manager			Product Install Locations		Wire Chart		Done				
Main End Locations		Pick a "Main End Location" then...click the End button		Cecilia Christenson Wade Realty Home Entertainment System 1292.1-1.100			Wire Labels		AutoSet Wire ID's						
or...Pick/Type a Product in the End field		Sort By Source Discipline Make Model		Sort By Source Area Make Model		Assign Main End Location		End Product Zone - Area - Make : Model End Product Install Location		Source ID Wire Class		Wire & Cable Description		End ID Wire Type	
Audio	1 - Atrium - Linn : 5101 Personal Handset	End		1 - Atrium : Sony : SLV-N99		Src-0001		Bulk		16/2 Speaker Wire - Description for Work Orders (Monster : 16/2 Spkr		End-0001		Home Run	
Keypad	Install this in the upper shelf	End		Install Notes for Sony SLV-N99		Src-0002		Pre-Cut		Pair of phono-phono leads (Black cable)		End-0002			
Audio	1 - Atrium - Linn : 5101 Personal Handset	End		Structured Wiring Panel		Src-0004		Bulk		RG6 Direct Burial MV-Quad Video Cable		End-0004		Room Run	
Keypad	Install this in the upper shelf	End		Structured Wiring Panel											

Enhancement –Project/Wire Manager: Auto post Wire keys when entering Wire Manager

Each time you enter the Wire Manager all of the Wire records are posted with keys that enable them to be organized on the Wire Chart and Labels by Discipline, Zone/Area, Make and Model for each individual wire. This is important when choosing the Itemize Wire option that creates a separate wire for each Product Qty that those wires are associated with.

Enhancement – Project/Wire Manager: Print Wire Chart and Labels-Auto ID option

When you print the Wire Chart or Wire Labels you are now prompted to AutoSet the Wire ID's.

The screenshot shows the 'Proposal - Wire Manager' window with a message dialog box overlaid. The dialog box contains the following text:

Message

Be sure to run the AutoSet Wire ID numbers utility before Printing this report.

Do you want to Print, AutoSet the Wire ID's or Cancel?

Buttons: Cancel, AutoSet ID's, Print

Red arrows point from the 'Wire Chart' and 'Wire Labels' buttons in the background to the 'AutoSet ID's' button in the dialog box.

Enhancement – Project/Wire Manager: Improved Wire Chart Report

The Wire Chart Report has been improved Data Organization and Layout for better comprehension and use.

7/18/2011		EME Audio & Video Systems Wire & Cable Chart				Page 1
Cecilia Christenson Wade Realty Home Entertainment System 1291.1-1.100						
Type	Qty	Source	Zone - Area - Make : Model	Discipline	End	End ID Done
Bulk/PreCut	Source ID	Install Location (Source)			Install Location (End)	
Audio						
Keypad		1 - Atrium - Linn : 5101 Personal Handset		1 - Atrium : Sony : SLV-N99		
		<i>Install this in the upper shelf</i>		<i>Install Notes for Sony SLV-N99</i>		
B	150 ft	Src-0001	16/2 Speaker Wire - Description for Work Orders (Monster : 16/2 Spkr Wire)			End-0001
P	1 pr	Src-0002	Pair of phono-phono leads (Black cable)			End-0002
B	75 ft	Src-0004	RG6 Direct Burial MV-Quad Video Cable			End-0004
B	150 m	Src-0005	Loudspeaker cable			End-0005
P	1 pr	Src-0019	Pair of phono-phono leads (Black cable)			End-0019
P	1 pr	Src-0022	Pair of phono-phono leads (Black cable)			End-0022
Keypad		1 - Atrium - Linn : 5101 Personal Handset		1 - Atrium : Sony : SLV-N99		
		<i>Install this in the upper shelf</i>		<i>Install Notes for Sony SLV-N99</i>		
P	1 pr	Src-0003	Pair of phono-phono leads (Black cable)			End-0003
P	1 pr	Src-0020	Pair of phono-phono leads (Black cable)			End-0020
P	1 pr	Src-0023	Pair of phono-phono leads (Black cable)			End-0023
B	150 m	Src-0025	Loudspeaker cable			End-0025
B	150 ft	Src-0027	16/2 Speaker Wire - Description for Work Orders (Monster : 16/2 Spkr Wire)			End-0027
B	75 ft	Src-0029	RG6 Direct Burial MV-Quad Video Cable			End-0029
Keypad		1 - Atrium - Linn : 5101 Personal Handset				
		<i>Install this in the upper shelf</i>				
P	1 pr	Src-0018	Pair of phono-phono leads (Black cable)			End-0018
P	1 pr	Src-0021	Pair of phono-phono leads (Black cable)			End-0021
P	1 pr	Src-0024	Pair of phono-phono leads (Black cable)			End-0024
B	150 m	Src-0026	Loudspeaker cable			End-0026

Enhancement – Project/Wire Manager: Improved Wire Label Report

Improved Wire Labels with Source and End Labels and Project Client and Project Number.

7/18/2011		Cecilia Christenson Wade Realty 1291.1-1.100		Page 1
Audio	Audio	Audio		
<u>Src-0001</u>	<u>Src-0022</u>	<u>Src-0027</u>		
1 - Atrium - Linn : 5101 Personal Handset	1 - Atrium - Linn : 5101 Personal Handset	1 - Atrium - Linn : 5101 Personal Handset		
End-0001	End-0022	End-0027		
1 - Atrium : Sony : SLV-N99				
Audio	Audio	Audio		
<u>Src-0002</u>	<u>Src-0003</u>	<u>Src-0029</u>		
1 - Atrium - Linn : 5101 Personal Handset	1 - Atrium - Linn : 5101 Personal Handset	1 - Atrium - Linn : 5101 Personal Handset		
End-0002	End-0003	End-0029		
Structured Wiring Panel	1 - Atrium : Sony : SLV-N99			

Enhancement – Project Work Order/Invoice: Improve Appointment GUI

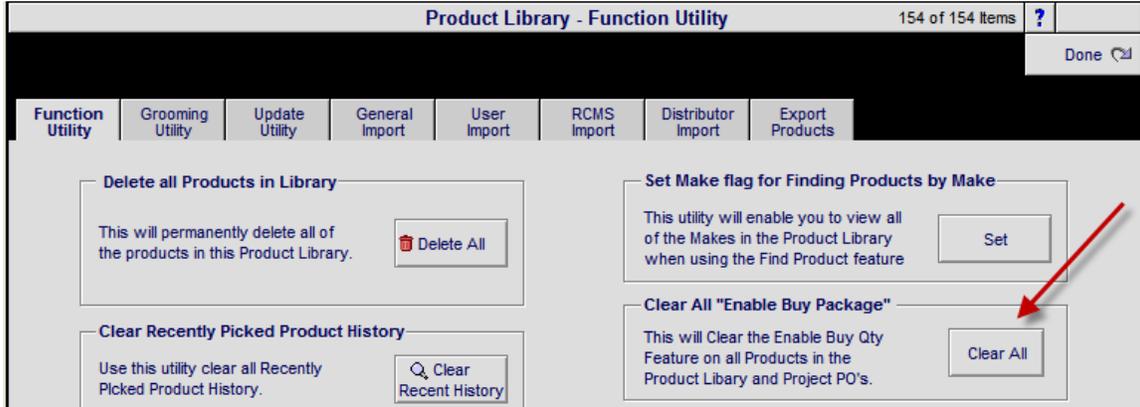
Making a Task Appointment for Work Orders is now easier and the Appointment Date and Time now appear on the printed Work Order.

Setup Delete WO		Work Order Detail Not Posted		Post WO <input checked="" type="checkbox"/>	◀ Prev/Next ▶	?
WO Number 2008 - 1293.1-1.100 WO Date 7/20/2011		Mike & Jessica Potter Home Entertainment System 1293.1-1.100		<input type="checkbox"/> Show Area Text <input type="checkbox"/> Hide Labor Time	<input type="button" value="Create Continuation WO"/> <input type="button" value="Pick List"/> <input type="button" value="Done"/>	
Master Tracker Appointment WO Total Time 6:30 Additional Time <input type="text"/> WO Time Total 6:30 Requested Installer <input type="text"/>		WO Notes		<input type="button" value="Auto Set Installed Qty"/>	<input type="button" value="Install Tasks"/>	<input type="button" value="Print & Post"/> <input type="button" value="View"/>
<input type="button" value="Add Appt"/> <input type="button" value="Edit Appt"/>				Install Log Global Entry <input type="button" value="Total Left to Install"/> <input type="button" value="All"/> <input type="button" value="Total Time"/> <input type="button" value="Edit Log"/>		
Appointment: 7/20/2011 7:00 AM		Sort Zone - Area Phz Class Install Location Qty Make Model Description Serial Numbers		<input type="button" value="Item Entry"/>	<input type="button" value="Qty Installed"/>	<input type="button" value="Left To Install"/>
1 Atrium 1 ea Linn 5101 Personal Handset		2 Product Universal learning remote		<input type="button" value="Install Time"/>	<input type="button" value="Edit Log"/>	<input type="button" value=""/>

Work Order Date 7/20/2011 Page: 1	<h1>EME Audio & Video Systems</h1> <h2>Work Order</h2>	Work Order Number 2008 - 1293.1-1.100
Address 1: Mike & Jessica Potter 567 58TH Street Oakland, CA 94607	WO Installer Project Manager Joel Roberts	Sales Specialist Project Engineer Jim Engandela Jon Oster
Address 2: Mike & Jessica Potter	Installation Appointment: <u>7/20/2011</u> <u>7:00:00</u> Date Installed: _____ Credit Release: _____ Projected Install Time: 6:30:00 WO Installation Time: _____ Installer Name: _____ Actual Install Time: _____ Installer Name: _____ Actual Install Time: _____ Installer Name: _____ Actual Install Time: _____	
Contact Numbers (H) 715-830-5022 eMail: Jessica Robinson	Client Signature	

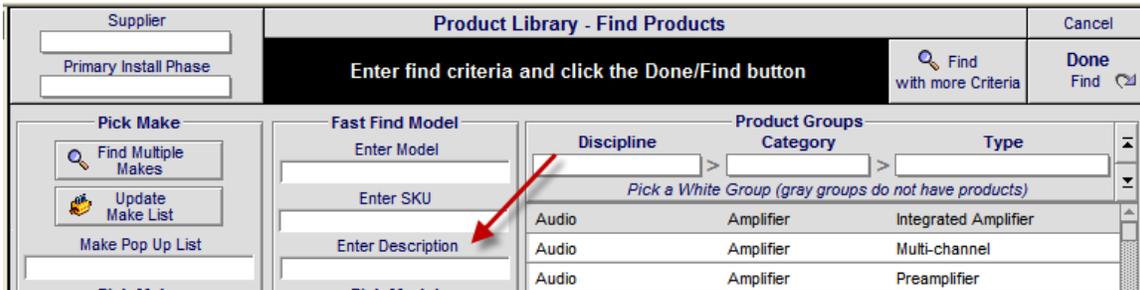
Enhancement – Product Library/Product Utility/Function: Clear All “Enable Buy Package “

A utility to clear the Enable Buy Package Option flag on all of the products in the Product Library has been added.



Enhancement – Product Library/Find Products: Find by Product Description

Finding Products by enter the Description or partial Description as been added to the Find Products screen.



Enhancement – Product Library/Product Detail: Refine Alternate & Option Vendor fields

Alternate Vendor

In order for Vendor info to appear on PO's you need to create a Contact for the vendor and set the category to Vendor. Then set the PO Make Name for that Vendor. This is all done in the Contact module. After you have done this, SCPS will automatically use the Vendor associated with the Make of this Product. The Alternate Vendor field is only used if you want to purchase this product from a different Vendor than the default Vendor.

Optional Vendor

The Optional Vendor field is only used for storing a Vendor that you might use for this product. It is not connected to any other functions in SCPS.

Optional Cost

The Optional Cost field is used for Exchange Rate purposes and to simply store other costs and suppliers for this product.

Alternate PO Vendor <input type="checkbox"/> ?	Optional Vendor <input type="checkbox"/> ?	Optional Cost ?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Alternate PO Vendor ?	Purchasing Lead Days	Tax A	Tax B	Fav	Place
<input type="checkbox"/> ?	7	T	T	A	m
Linn	7	T	T	A	m

Enhancement – Master Tracker: Improve GUI. Rearrange Tag-Hide-Delete and Auto Tag

The Tag, Hide and Delete check boxes have been moved to the right side of the screen and arranged horizontally for quicker access. The Auto Tag feature lets you quickly Tag, Hide or Delete multiple Tasks. The Info, email and Print buttons are also on the right side of each Task. The Task Done button/Date and View Detail button are on the left side of each Task.

Show All		Find Items		Proposals		Projects		Change Orders		Completed		Other Tasks		Appointments	
New Task				Past				Today				This Week			
New Appointment				This Month				Next Month							
Adm		View		Due Date		Tracker Item		Proposal Project		Item Owner		Total Labor		Auto Tag	
Mgr		Detail		Month - Day		Item Name		Client		Email		Total Pmts		Info eMail Print	
User		Done		Appoint Time		Description		Company		Status/Notes		Tag		Hide Delete	
		7/26/2011		Jul - Tue		Project Milestone - Payment		1291.1-1.100		Sandy Engandela		\$2,261.80			
		7/26/2011		Jul - Tue		Project Task - Purchasing		1291.1-1.100		Joel Roberts					
		7/27/2011		Jul - Wed		Project Milestone - Payment		1293.1-1.100		Sandy Engandela		\$12,039.34			

Message

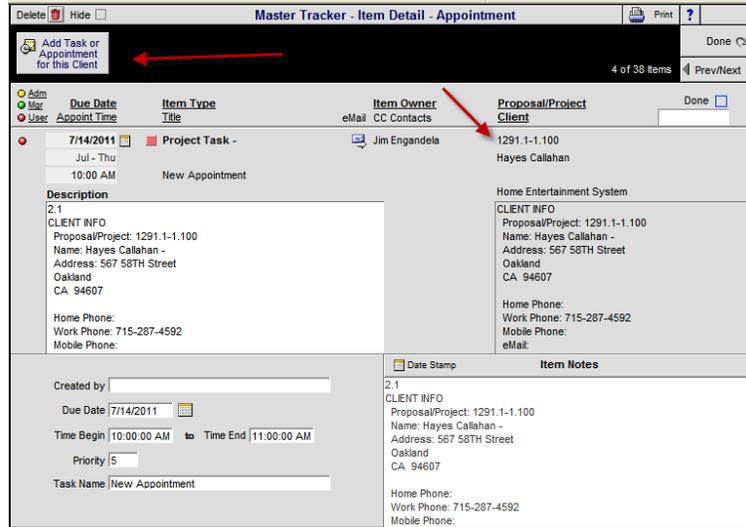
Check or unCheck all of the Items showing on this screen.

Enhancement – Master Tracker: Add Proposal/Project Title to Task List

The Client and Company name are now on one line and the Proposal/Project Title has been added to the Task List. Both the Client/Company and Proposal/Project Title fields can be clicked on to view the entire contents.

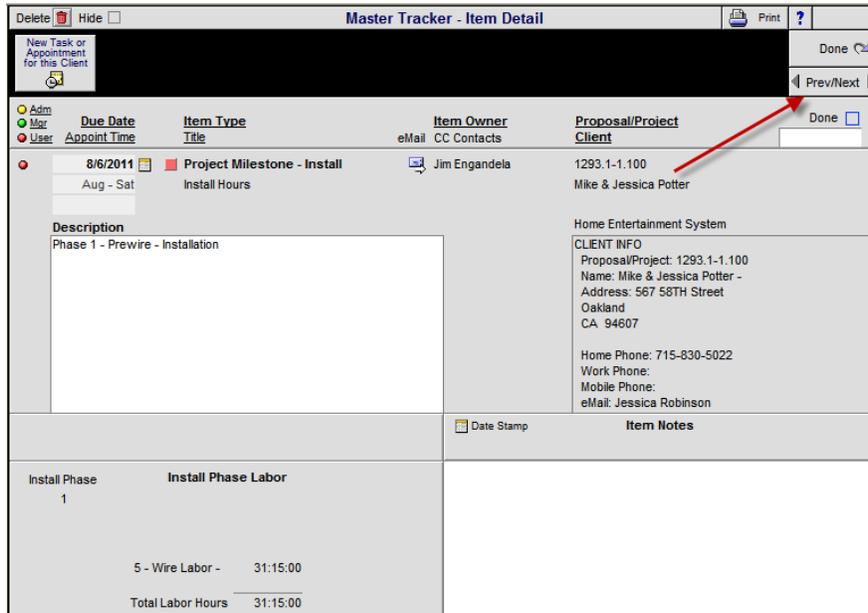
Enhancement – Master Tracker/Task Detail: Add Task or Appointment for Client

When viewing the Task Detail in the Master Tracker you can create another Task or Appointment for the Task Client directly from this screen.



Enhancement – Master Tracker/Task Detail: Previous – Next cycles through screens

When using the Previous/Next buttons to cycle between Tasks the screen automatically changes for the appropriate Task Type (Task, Appointment or Project Payment Milestone, Project Install Milestone).



Enhancement – Master Tracker: Duplicating Entities Manages Tracker Tasks

Duplicating a Proposal with a Revision Number or New Number;

- Original Proposal - Retains Proposal Tasks.
- New Proposal – Deletes Original Proposal Tasks and Adds New Proposal Tasks.

Duplicating a Project into a Proposal with a New Number;

- Original Project - Retains Project Tasks.
- New Proposal - Deletes Original Project Tasks and Adds New Proposal Tasks.

Duplicating a Completed Project into a Proposal with a New Number;

- Original Completed - Retains Completed Tasks.
- New Proposal - Deletes Original Completed Tasks and Adds New Proposal Tasks.

Fix – Proposal/Project/Wire Manager: Select all Wire Records when entering Wire Manager

If you select an Area without any Products that have Wire Supplements or Show an Area in the Wire Supplement screen that does not have any Wire Supplements when you go into the Wire manager you will get a pop indicating that there are no Wire Supplements in the Proposal. This has been corrected so that entering the Wire Manager from any screen clears the Area selection and shows all Wire Supplements.

Fix – Proposal/Project/Wire Manager: No carriage return added when Renaming an Area

A carriage return was entered into the Zone – Area : Make : Model fields, when Renaming an Area, which caused the second line to not be displayed in the Source fields. This has been corrected. The End Product Pop up list also displays all of the Products in the Proposal correctly now that these carriage returns have been removed. These Area –Make fields can also now be clicked on to reveal all of the data when long Area names are used.

Discipline Type		Source Product Zone : Area : Make : Model Install Location Notes	Assign End	End Product Zone : Area : Make : Model Install Location Notes	Source ID Class	Wire & Cable	End ID Type
Audio	Bookshelf	2 - Back Balcony : Linn : Katan	End:	2 - Back Balcony : Linn : 5101 Personal Handset	Bulk	Linn : K20 Cable Loudspeaker cable	Room Run

Fix – Proposal/Project/Wire Manager: Fix Change Order Products Wire Location

Products in the Wire Manager added from Change Orders were showing the Location data that was being added to Products from the Proposal. This has been corrected.

Fix – Proposal/Project/Wire Manager: Wire Chart Sort Order

The sort order for the Wire Chart Report is as follows

- Source Product
- Discipline
- Type
- Zone/ Area
- Wire ID

Fix – Project/PO/PO Report: Combine Like Kind Quantities

The printed PO now properly combines like kind quantities and displays the correct Qty for both Regular and Buy Package quantities.

EME Audio & Video Systems					
Purchase Order			PO Date		
PO Number 1075			PO Date 9/12/2006		
Vendor:		Account #:		Ship to:	
				EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937	
Phone		Fax		Phone	
				715-287-3335	
				715-287-4464	
Email:			Email: horizon@trivest.net		
Project			Buyer		
John & Mary Smith			Buyer: Joe Buyer		
Project Reference: 1284.1-1.100			Email: horizon@trivest.net		
Terms		Shipping		Special Instructions	
		Best Way			
Order Qty	Make	Model	Finish	Cost	Ext Cost
1 ea	Linn	5125	Silver	1,650.00	1,650.00
Rovd	Five channel power amplifier (Black)				
1 ea	Linn	Classik Musio-S	Silver	930.00	930.00
Rovd	Integrated CD player/tuner/preamp/power amplifier				
5 pr	Linn	Katan	Black	597.00	2,985.00
Rovd	Bookshelf loudspeakers: pair				
1 ea	Linn	Klimax Chakra 500 Twin-BindPost	Silver	4,797.00	4,797.00
Rovd	Klimax two-channel power amplifier				
2 ea	Linn	Melodik	Black	2,970.00	5,940.00
Rovd	Aktive isobarik bass extension loudspeaker				

Fix – Project Change Order Tasks/Tracker/Tasks: CO Tasks now show up properly in the portal

CO Tasks created when a CO is Finalized now show up properly in the CO/Tracker/Task screen and in the Master Tracker when you click on the Find All, Change Order and CO Number find buttons.

Fix – Project Change Order/Tracker/Tasks: Change Order Tasks Dates

Fix Project Change Order Tasks Dates so the Auto Tasks and Auto Milestones are keyed off of the Installation date

Fix – Archived Proposals: Tracker (block access)

Access to the Tracker in an Archived Proposal is now blocked instead of going to the Horizon screen.

Fix – Product Library/Print Menu: Print Discontinued Items

The Print Discontinued Items now prints the correct report which shows the Qty on Hand. This report has also been added to the Inventory Control Reports screen.

Print/Preview Reports

These reports will print only products specified in the report name


[Discontinued Product List](#)

Fix – Proposal/Project/Completed Tracker: Done option to go to Task Detail screen

If you choose to go to the Task Detail screen, when clicking on a Task Done button (from a Proposal, Project or Completed Project) you now will go to the Task Detail screen and return to the Proposal or Project Tracker screen when you are Done.

Proposal Tracker - Milestones & Tasks Date Created: 9/12/2006 Home

Mike & Jessica Potter Done

Cue Days are based on the Proposal due date 1282.1-1.100

Proposal Due Date: 6/17/2010 Update Proposal Milestones & Tasks

Hide	Done	Done Date	Due Date	WBS	Type	Task Name	Description	Item Owner
<input type="checkbox"/>	<input type="checkbox"/>		6/2/2010		Task - Discovery	Client Profile	Interview client & complete	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		6/7/2010		Task - Discovery	Walk Through	Gather project details	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		6/9/2010		Task - Review	Design & Engineering	Review client profile with	Jon Oster
<input type="checkbox"/>	<input type="checkbox"/>		6/10/2010		Task - Followup	Send letter to Client	Send Post interview letter to	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		6/12/2010		Task - Review	Sales Review	Review client profile with	Joel Roberts
<input type="checkbox"/>	<input type="checkbox"/>		6/17/2010		Milestone - Proposal	Proposal Due	Present proposal to client	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		6/19/2010		Task - Followup	Send letter to Client	Post proposal letter	Jim Enqandela

Message

Click Done to complete this item as Done with Today's date or
Click Detail to enter custom info/dates to your Done item.

Fix – Master Tracker/Task Detail: Insert Date

You can now Insert a Date in the Task Detail field regardless if your curser is in this field or not and the Date will be inserted at the end of your Notes Text.

Date Stamp **Item Notes**

test data 7/15/2011

Fix – Master Tracker/Calendar: Fix Task Import to Calendar and Gant Chart

Reset the Import Map to CalTask so that the Calendar properly displays the Daily, Weekly and Monthly Tasks and Milestones. Reset the Import Map to GantTask so that the Gant Chart properly displays the Project Install Start and End Dates.

Find Items	Show All	Proposals	Master Tracker		Milestones	Util	Home
New Task	Past Today	Projects	Tuesday	Proposals Due	Gantt	Leave	
New Appointment	This Week	Change Orders	August 16, 2011	Install Phases	Calendar	Email All	
	This Month	Completed	User: Jim Engandela	Payments Due	Tracker	Print Menu	
	Next Month	Tasks	89 Items 637 Total	Purchasing Due			
Adm	View	Due Date	Tracker Item	Proposal Project	Item Owner	Total Labor	Auto Tag
Mar	Detail	Month - Day	Item Name	Client - Company	Email	134:27	Info eMail Print
User	Done	Appoint Time	Description	Proposal/Project Title	Status/Notes	Total Pymts	Tag Hide Delete
		8/16/2011	Project Task - Review	1284.1-1.100	No email	\$142,390.33	
		Aug - Tue	Review trim phase	John & Mary Smith			
			Check for accuracy	Home Entertainment System			

End of Version 8.3v1

SCPS Version 8.2v1
Released: 7/07/2011

Revision List Summary

Master Preferences

Enhancement - Master Prefs/Users: Multiple Location Contacts

Enhancement - Master Prefs/Users/Access Rights: CO, PO, WO, SI

Enhancement - Master Prefs/Users/Access Rights: Sell Price-Minimum Sell Access Rights

Enhancement - Master Prefs/Lists: Contacts: Value Lists

Enhancement - Master Prefs/Wire Supplements: Bulk Room Run Qty - Default Override

Enhancement - Master Prefs/Other/Projects 1: Project/Work Order: Sum or Project mode

Main System

Enhancement - Main Logo Screen: Speed Up Entering Proposals/Projects/Completed

Enhancement - Main Logo Screen: Speed Up Entering Proposals/Projects/Completed

Enhancement - Main Logo Screen/Forms: Document & PDF Attachments

Enhancement - Subscription Code Renewal: Continue Working in SCPS Message

Proposals

Enhancement - Proposals/Payments: Installation Type & Payment Director

Enhancement - Proposals & Projects/Parts & Wire Detail: Add Labor Summary to these screens

Enhancement - Proposals & Product Detail: Product Pricing Summary

Enhancement - Proposals/Areas & Products/Supplement View: New Screen

Enhancement - Proposals/Parts Supplements: Deleting Phantom Product Parts - Notice

Enhancement - Proposals/Projects: Phantom Product Indicators

Enhancement - Proposals/Products: Product Group Indicator

Enhancement - Proposals/Projects: Labor Meter

Enhancement - Proposals/Print Menu/Contract: Increase the size of Contract Sections

Enhancement - Proposals/Project: Product Install Locations

Enhancement - Proposals/Print Menu: Product Locations are shown on Proposal Report

Projects

Enhancement - Projects/Product Detail Screens: View all Detail Screens in Project Mode

Enhancement - Projects/Wire Supplement: Adjust Bulk Wire Home Runs

Enhancement - Projects/Product Detail Screens: View all Detail Screens in Project Mode

Enhancement - Projects/Wire Supplement: Adjust Bulk Wire Home Runs

Enhancement - Projects /Wire Manager: New Wire Manager screen layout

Enhancement - Projects/Wire Manager: Main Location Selector

Enhancement - Projects/Wire Supplement/Wire Manager: New Wire Chart Report

Enhancement - Projects/Purchase Orders: Product Prices

Enhancement - Projects/Work Order/Work Order Invoice: Product Locations

Enhancement - Projects/Utility/Admin: Update Product Info

Product Library

Enhancement - Product Library/Phantom Product: Speed up search of Phantom Products

Enhancement - Product Library/Recent Products: Remove Today calc-speed up Pick Products

Enhancement - Product Library/Main Line List: New Button Layout

Enhancement - Product Library/Data Grooming Utility: New screen GUI

Enhancement - Product Library/Product Detail and Purchasing: Order Now indicator

Enhancement - Product Library/Product Detail: Improved Screen GUI and New Features

Enhancement - Product Library/Product Detail: Purchasing & Work Orders Descriptions

Enhancement – Product Library/Product Detail: Buy Package Option

Enhancement - Product Library/Product Detail: Cost and Sell Price List Updated dates

Enhancement - Product Library/AlphaFinder: Make Name Grooming Utility

Enhancement - Product Library/Print Menu: Consumer Price List Report

Master Tracker

Enhancement - Master Tracker/Task Manager: Past Task Indicator

Enhancement - Master Tracker/Appointment Task: Add End Time field to Task Detail

Enhancement - Master Tracker/User Item Detail: New screen similar to regular Tracker Tasks

Enhancement - Master Tracker/Done: Option to add detail when completing a task.

Bug Fixes

Fix - Proposals/Wire Supplements: Labor Adjustment now track Wire Supplement Qty Changes

Fix - Proposals/Area & Products: Pick Product Sets – Auto Add Area Text

Fix - Proposals/Payment: unHide Portal Displays

Fix - Proposals/Info: Changing Master Tracker Dates, retains entered date.

Fix - Proposals & Project Tracker: Auto Updating Tasks and Milestone Dates

Fix - Contact/Contact Detail: Add New Task. Clear Project Keys

Revision Details

Below

Enhancement - Master Prefs/Users: Multiple Location Contacts

Users assigned to Multiple Locations can now have the same Employee User number. This number shows up on your Proposals and Projects (1-100) (2-100). Having the same User Employee number on all of your documents makes referencing your proposals easier.

Company Location	Last Name	First Name	Initials	User Alpha Number	Job Title	Access Rights	Login Password	Assign Users to Project Managers
1	Dowling	Dave	SR	134	CAD Operator	DD	Manager	Jon Oster
1	Engandela	Jim	JE	100	President	JE	Manager	Jim Engandela
2	Engandela	Jim	JE	100	President	JE	Manager	Jon Oster

Enhancement - Master Prefs/Users/Access Rights: CO, PO, WO, SI

New **User Access Rights** for Project Change Orders, Purchase Orders, Work Orders and Sales Invoices. **These check boxes will need to be checked, for those users who you want to have access to these modules.**

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

Projects

- Change Orders
- Purchase Orders
- Work Orders
- Sales Invoices
- Override Print Menu Prefs and Print Options Lockout

Enhancement - Master Prefs/Users/Access Rights: Sell Price-Minimum Sell Access Rights

You can now select Master Prefs/Users/Access Rights to allow users to adjust the Sell Price on a Proposal Product, but not go below the Minimum Sell Price. If you choose to not allow them to go below the Minimum Sell Price, then it is recommended that you also do not allow them to Edit the Minimum Sell price. This new checkbox will not be checked for your users after you upgrade so you should go through your users rights and make the appropriate setting for each user.

Edit

- List Price
- Sell Price Do Not Allow Sell Price Less than Minimum Sell
- Minimum Sell
- Cost Price

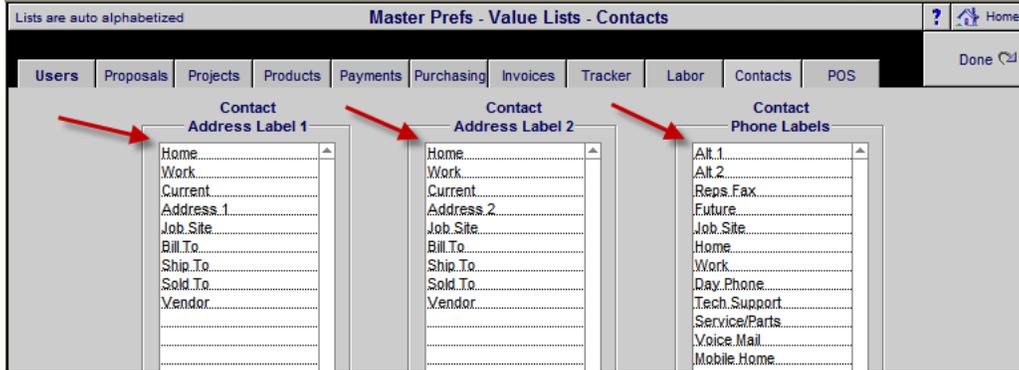
Unit Price

Unit	Unit Price	
ea	List	
	Sell	\$400.00
	Minimum Sell	\$380.00
	Loaded Cost	\$234.00

Adjustment
Sell GP% 41.5%

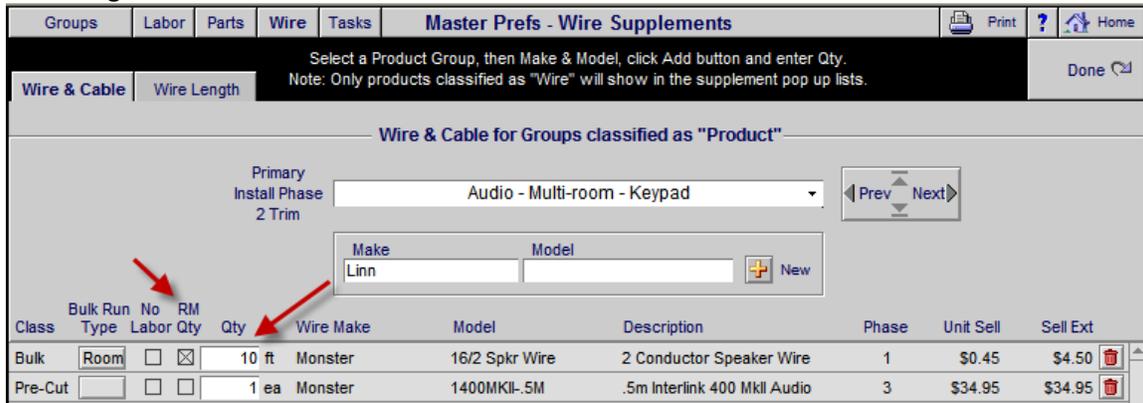
Enhancement - Master Prefs/Lists: Contacts: Value Lists

A new screen for storing Contact value lists is in the Master Prefs/List module. This enables you to enter values for POP up lists, so you will not lose these values when you upgrade.



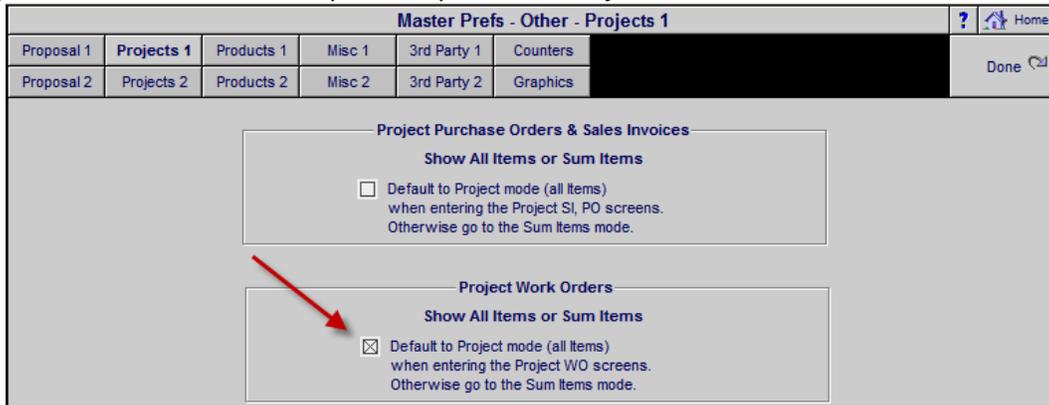
Enhancement - Master Prefs/Wire Supplements: Bulk Room Run Qty - Default Override

You can now override the Bulk Wire **Room Qty** default value on Product Groups the same way you can on Product Library/Additional Wire Supplements. Once you change this default value, all Product Wire supplements in your Product Library assigned to this Group will reflect the new Wire Length.



Enhancement - Master Prefs/Other/Projects 1: Project/Work Order: Sum or Project mode

In the Project Work Order screen, if you choose the Project view mode, then each product shows on the screen. The Sum mode combines like kind Item Quantities for each Product which makes it easier to issue Work orders. You can now set the Sum or Project View Default mode for the Project Work Order screen independently from the Project Sales and PO screens.



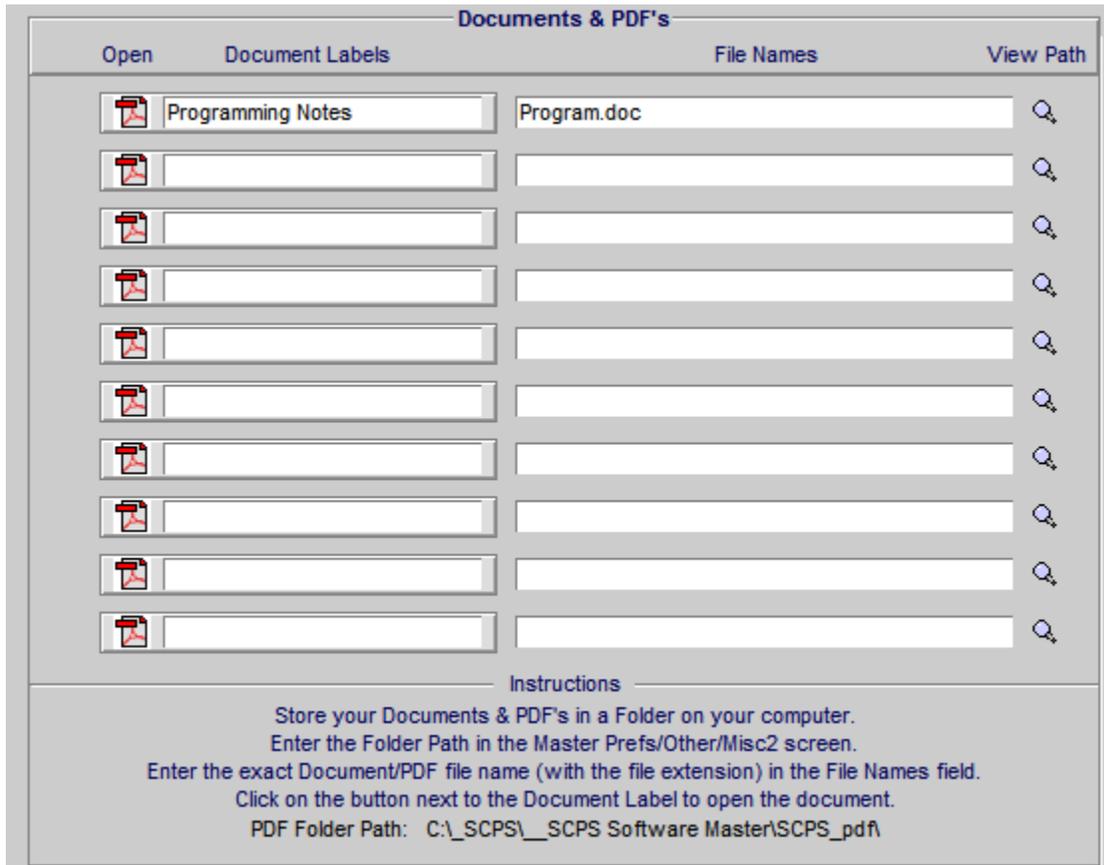
Enhancement - Main Logo Screen: Speed Up Entering Proposals/Projects/Completed

The routine that maintains the integrity of the AlphaFinder each time you enter these modules has been re-engineered to optimize the speed, especially when you have a large number of Proposals/Projects.



Enhancement - Main Logo Screen/Forms: Document & PDF Attachments

You can now attach Documents and PDF files stored in your computer and open them directly from the SCPS Forms module. You can either enter the entire path of the file stored in your computer or enter the path to the Folder where you store your documents in the Master Prefs/Other/Misc 2 screen and then simply enter the document File Name. This is similar to the Product PDF module.



Forms Document-PDF Folder Path

Document Folder Path

PC Windows Path Example: C:\Horizon\SCPS_pdf
 Mac OS Path Example: file:///pathToFolder

Example: if you have a PDF file in a folder here:
 Macintosh HD/Users/Username/Desktop/myPDF.pdf
 Use the following URL: File:///Users/Username/Desktop/myPDF.pdf

Network Users please note: Make sure all guest computers have the same server drive map designation.

Enhancement - Subscription Code Renewal: Continue Working in SCPS Message

The Subscription Renewal screen and Continue button have been improved. If you click on the Continue button you will be asked to Get a new code and then to click on the Continue button again and click on the SCPS button .

The screenshot shows the Horizon Software subscription renewal interface. At the top is the Horizon Software logo and a warning: "Your SmartPartner subscription license will expire in 80 Days". Below this are sections for "Get New Subscription Code", "Continue Working in SCPS", "Enter New Subscription Code", and "Exit SCPS". A message dialog box is overlaid on the "Continue Working in SCPS" section. The dialog box contains the following text: "Message", "Your SmartPartner subscription is going to expire soon. Please click Get Code and Contact Horizon for a new code.", and "If you want to continue working in SCPS while you wait for a new code, click on the Continue button again and then click on the SCPS button below." The dialog box has two buttons: "SCPS" and "Get Code". Red arrows point from the "Continue SCPS" button on the main screen to the "SCPS" button in the dialog box, and from the "Get Code" button in the dialog box to the "Get Code" button on the main screen.

Enhancement - Proposals & Projects/Parts & Wire Detail: Add Labor Summary to these screens

Adding the Labor Summary sections to the Parts and Wire Detail screens enables you to see the Labor changes that occur, when you change the Parts and Wire Supplements.

Restore Wire Prices		Proposal - Product Detail - Wire Supplements						1 of 2	?	Home		
Areas		Text		Products		Hayes Callahan 1290.1-1.100				Proposal Detail		
Labor		Parts		Wire		Tasks		Linn : 5101 Personal Handset Audio : Multi-room : Keypad				
Product		Specs		Pix - PDF's		Labor		Parts		Wire		
Wire Make		Model		Wire & Cable						Atrium		
				Add		Product Qty				Only products classified as "Wire" can be added Wire & Cable are Itemized		
						1						
Class	Bulk Run Type	No Labor	Total Qty	Wire Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell		
Bulk	Home		750	Linn	K10 Cable	Loudspeaker cable	1	3.00	5.00	3,750.00	<input type="checkbox"/>	
Bulk	Home		750	Monster	16/2 Spkr Wire	2 Conductor Speaker	1	0.15	0.45	337.50	<input type="checkbox"/>	
Bulk	Room		75	Monster	MVQUAD-B DB EZ500	RG6 Direct Burial	1	0.60	1.80	135.00	<input type="checkbox"/>	
Pre-Cut			3 pr	Linn	Black Interconnect	Pair of phono-phono	1	72.00	120.00	360.00	<input type="checkbox"/>	
Wire Labor - Phase 1+2+3 Totals											Wire Ext Total:	\$4,582.50
Wire Labor Type		Time Per/Ft	Hourly Rate		Time		Cost		Sell			
Total DOD: 0%			Cost	Sell	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD		
5 - Wire Labor - Bulk		0:00:30	35.00	60.00	12:30:30	12:30:30	\$437.79	\$437.79	\$750.50	\$750.50		
6 - Wire Labor - Precut		0:00:30	40.00	60.00	0:15:00	0:15:00	\$10.00	\$10.00	\$15.00	\$15.00		
Labor Time Total:						12:45:30	Wire Labor Total:				\$765.50	
Wire & Labor - Installed Ext Total:										\$5,348.00		

Enhancement - Proposals & Product Detail: Product Pricing Summary

Both Product Library and Proposal Product Details screens now have improved pricing layouts with Parts and Wire separately displayed and better clarity.

Product		Supplements		Installed Price	
Product	Parts	Wire	Product	Parts	Wire
\$390.00	\$1,085.00	\$1,312.50	\$390.00	\$1,085.00	\$1,312.50
\$610.00	\$50.00	\$202.50	♦ Labor	\$862.50	
\$1,000.00	\$1,135.00	\$1,515.00	Total	\$3,650.00	

Sell Updated 6/2/2011	Product	Parts	Wire	Unit Installed Price	
	Unit Price w/Adjustment	Unit Price	Unit Price	Product	\$390.00
	\$390.00	\$1,085.00	\$1,831.50	Parts	\$1,085.00
	\$610.00	\$50.00	\$285.00	Wire	\$1,831.50
Cost Updated 6/2/2011	\$1,000.00	\$1,135.00	\$2,116.50	♦ Labor	\$945.00 GP%
	6:30:00	1:00:00	4:45:00	Total	\$4,251.50 44.8%
				Time	12:15:00
Extended Qty 1	Product	Parts	Wire	Extended Installed Price	
	Ext Price w/Adjustment	Ext Price	Ext Price	Product	\$3,306.50
	\$390.00	\$1,085.00	\$1,831.50	Parts	\$1,085.00
	\$610.00	\$50.00	\$285.00	Wire	\$1,831.50
\$1,000.00	\$1,135.00	\$2,116.50	♦ Labor	\$945.00 GP%	
6:30:00	1:00:00	4:45:00	Ext Total	\$4,251.50 44.8%	
			Ext Time	12:15:00	

Enhancement - Proposals/Areas & Products/Supplement View: New Screen

A new screen that consolidates the Labor, Parts and Wire Supplements into one screen gives you a quick snapshot of all of the Product Supplements, except Tasks.

Super View	Sum View	Supp View	Proposal - Areas & Products				Labor Total	Grand Total	?	Home
			Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100				Equipment Installation	\$7,743.99	Done	
							Misc. Parts	\$105.00		
							Wire & Cable	\$1,468.30		
							Area Total	\$10,039.79		Labor Time
										11:22:30
Areas		Text		Products						
Labor		Parts		Wire		Tasks				
Loc		Zone		Areas		Products in the Zone 3 - Office				
0		m		Atrium		Client Mode				
1		m		Home Theater		Add Products Add Sets Add/View Pure Supplements				
2		m		Living Room		Discipline Cat : Type View Qty Place Make : Model Sort Unit Sell Tag				
3		m		Office		Extended Sell				
4		m		Dining Room		Audio 1 ea Linn : Classik Movie Di-B \$3,995.00				
4		m		Kitchen		Amplifier : Surround Receive m Integrated multi-channel DVD-CD \$3,995.00				
						Audio 1 ea Linn : Classik Speaker Package \$2,250.00				
						Speaker : 5.1 System m Complete 5 speaker surround \$2,250.00				
						Video 1 ea Sony : KV-27FS13 \$549.99				
						Display : TV GT 27 Inch m 27 FD Trinitron® WEGA® TV \$549.99				

Super View	Sum View	Supp View	Proposal - Supplement View				= Phantom Product		?	Home
			Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100				Adjust Bulk Wire Home Runs	18,000 Sq Ft	Update	Done
							Adjust Bulk Wire Room Runs	100 %	Update	Labor Summary
All Areas		Office		Labor Supplements						
Zone - Area		Qty Make : Model		View Edit Labor Type Sort		Install Phases A B		Hourly Rate		Total Time with DOD (h:m:s)
3 - Office		1 Linn : Classik Movie Di-B		Installation		3 T T		\$60.00		1:00:00
3 - Office		1 Linn : Classik Movie Di-B		Programming		3 T T		\$80.00		0:45:00
3 - Office		1 Linn : Classik Movie Di-B		Wire Labor - Precut		3 T T		\$60.00		0:30:00
3 - Office		1 Linn : Classik Speaker Package		Installation		1,2,3 T T		\$60.00		3:30:00
3 - Office		1 Linn : Classik Speaker Package		Wire Labor - Bulk		1 T T		\$60.00		0:37:30
3 - Office		1 Linn : Knekt RCU		Installation		1,2 T T		\$60.00		1:00:00
						Labor Total		11:22:30		\$722.50
Parts assigned to		Office		Parts Supplements						
Zone - Area		Qty Make : Model		View Edit Parts Qty Parts Make : Model		Install Phase A B		Unit Sell		Ext Sell
3 - Office		1 Linn : Knekt RCU		1 ea Linn : IR Repeater		3 T T		\$85.00		\$85.00
3 - Office		1 Linn : Knekt RCU		1 ea Linn : Knekt RCU Metalwork		2 T T		\$20.00		\$20.00
						Parts Total		\$105.00		
Wire assigned to		Office		Wire Supplements						
Zone - Area		Qty Make : Model		Class Edit Sort Bulk Run No Labor Wire Qty Wire & Cable Make : Model		Install Phase A B		Unit Sell		Ext Sell
3 - Office		1 Linn : Classik Movie Di-B		Pre-Cut		1 pr Linn : Black Interconnect		3 T T		\$120.00
3 - Office		1 Linn : Classik Movie Di-B		Pre-Cut		1 pr Linn : Black Interconnect		3 T T		\$120.00
3 - Office		1 Linn : Classik Movie Di-B		Pre-Cut		1 pr Linn : Black Interconnect		3 T T		\$120.00
3 - Office		1 Linn : Classik Movie Di-B		Pre-Cut		1 pr Linn : Black Interconnect		3 T T		\$120.00
3 - Office		1 Linn : Classik Movie Di-B		Pre-Cut		1 pr Linn : Black Interconnect		3 T T		\$120.00
3 - Office		1 Linn : Classik Movie Di-B		Pre-Cut		1 pr Linn : Black Interconnect		3 T T		\$120.00
3 - Office		1 Linn : Classik Speaker		Bulk		75 Monster : 16/2 Spkr Wire		1 T T		\$0.45
						Wire Total		\$1,468.30		

Enhancement - Proposals/Parts Supplements: Deleting Phantom Product Parts - Notice

Phantom Products are Products whose selling price is the total of the Parts Supplements attached to it. If you decide that you want to delete some of the Parts from a Phantom Product in a proposal, the Price of the Phantom Product needs to be manually changed or you need to delete the Phantom Product from your Proposal and add a different one configured as you wish. When you Delete one of these Phantom Product Parts (in a Proposal) you will be notified of this.

The screenshot shows the 'Proposal - Parts Supplements' window for 'Mr. & Mrs. Christenson, North American Fly LTD, Home Entertainment System, 1289.1-1.100'. The 'Parts Supplements' table lists items for the 'Breakfast Room' area. A red arrow points to a row for 'EME : Phantom 1' with a unit sell price of \$440.00. A message dialog box is displayed in the foreground with the following text:

Message

You are about to delete a Part which is a supplement to a Phantom Product. We recommend that you either adjust the sell price and the Labor of the Phantom Product after deleted this part or you delete the entire Phantom Product and make a new one (to your specs) in the Product Library and add it to this Proposal.

OK

Enhancement - Proposals/Projects: Phantom Product Indicators

A small blue box on many Proposal screens now indicates if the product is a Phantom Product.

The screenshot shows the 'Proposal - Areas & Products' window. The 'Products in the Breakfast Room' table lists items with their unit sell prices. A red arrow points to the 'EME : Phantom 1' row, which has a small blue box next to its unit sell price of \$440.00, indicating it is a Phantom product. Other products listed include 'Multi-room : Keypad', 'Audio', and 'Universal learning remote'.

The screenshot shows the 'Proposal - Products' window. The table lists products with their respective prices and labor. A red arrow points to the 'EME : Phantom 1' row, which has a small blue box next to its unit sell price of \$440.00. Other products listed include 'Multi-room : Keypad', 'Audio', and 'Universal learning remote'.

Zone - Area	Discipline	Phase	Make Category	Model Type	Sell Price Updated	Parts Labor	Product Labor	Unit List	Adjusted Sell	Extended Sell
Breakfast Room	Audio	1	EME	Phantom 1		245.00		440.00	440.00	440.00
Breakfast Room	Audio	2	Multi-room	Keypad		0.00		440.00		685.00
Breakfast Room	Audio	1	Linn	5101 Personal Handset		862.50		390.00	390.00	390.00
Breakfast Room	Audio	2	Multi-room	Keypad		1,085.00		300.00	390.00	1,252.50
Breakfast Room	Audio	2	Universal learning remote	Universal	6/2/2011	1,312.50		234.00		40.0%

Proposal - Product Detail 1 of 2 ? Home

Mr. & Mrs. Christenson North American Fly LTD
1289.1-1.100

EME : Phantom 1
Audio : Multi-room : Keypad

Phantom Product

Product Specs Pix - PDF's Labor Parts Wire Tasks **Breakfast Room**

Qty 1
Make EME Sell Price \$440.00 ea
Model Phantom 1
SKU
Finish

Group Audio : Multi-room : Keypad
Change Group Original Audio
Product Classification Product
Primary Install Phase 2 Trim

Purchase Orders - All - 1 Parts Qty On Back Order Done

Mr. & Mrs. Christenson North American Fly LTD
1289.1-1.100

PO Products PO Parts PO Wire Sum Proj

Phase	Zone - Area	Make : Model	Finish	Vendor ?	Qty Sold	Qty Staged	Remaining to Order	Qty to Order	PO's to Date
		CO# Part Assigned to...	Updated - Master Cost	Project Cost	PO Cost	On Hand			On Order Recvd to date Still on Order
3		Linn : Aktiv Modules EME : Phantom 1	6/2/2011	Linn Products	1 ea		1	5	

Purchase Orders - All - 3 Wires Qty On Back Order Done

Mr. & Mrs. Christenson North American Fly LTD
1289.1-1.100

PO Products PO Parts PO Wire Sum Proj

Phase	Zone - Area	Make : Model	Class	Vendor ?	Qty Sold	Qty Staged	Remaining to Order	Qty to Order	PO's to Date
		CO# Wire Assigned to...	Updated - Master Cost	Project Cost	PO Cost	On Hand			On Order Recvd to date Still on Order
3		Monster : 1400MKII-5M EME : Phantom 1	6/2/2011	Pre-Cut Monster Cable	1 ea		1	5	
1		Monster : 16/2 Spkr Wire EME : Phantom 1	6/2/2011	Bulk Monster Cable	150 ft		150	5	
3		Monster : HDM400-1M Sony : KP-65WV600	6/2/2011	Pre-Cut Monster Cable	1 ea		1	6	

Enhancement - Proposals/Products: Product Group Indicator

A small Red indicator next to the Product Group means that the Group assigned to this Product is not the same as it is in the Product Library. However, you can only change this on Proposals, not Projects. Clicking on this Red indicator enables you to update your Proposal if you wish.

Proposal - Products Client Mode ? Home

Jim Engandela
Horizon Software
Home Entertainment System

Update All Products Adjust Selected Prices Done

Message: Do you want to update all of the Product Groups in this Proposal to match the Product Library Groups?

View	Auto Tag	Replace Product	Change Group	Zone - Area	Discipline	Phase	Make	Category	Product Total
	1 ea		Option	1 - Home Theater	Sony	Video	Source	Progressive	99.95
	1			1 - Home Theater	Linn	Automation	Remote	Remote	90.00
					Horizon Remote Control				538.33
					Universal learning remote Universal				750.00

Enhancement - Proposals/Projects: Labor Meter

The Labor Meter Master Prefs/Other/Proposal 2: Default Percentage has been improved. Add the Labor Meter and Total Labor Hours to the Proposal and Project Pricing screen. Improve the pop up display so it compares the Total Equipment Amount with the Total Labor Amount.

Master Prefs - Other - Proposals 2

Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters	? Home Done
Proposal 2	Projects 2	Products 2	Misc 2	3rd Party 2	Graphics	

Labor Meter

If you want to compare the Total Labor with a Percentage of the Equipment Total.

Please set a Percentage here for new Proposals and in the Proposal/Pricing/Labor Rates screen for this Proposal/Project.

Labor Percentage of Equipment %

Client Mode Print ? Home Done

Proposal - Pricing

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

Pricing	Labor Rates	Commissions				
Tax Summary	Product Tax	Fees Tax				

Labor Meter Show Discount yes no
Show Sales Tax yes no

Total Labor (hrs:min:sec) 75:00:00

	Subtotals	Sell	GP%	Cost	Profit	Discount
Equipment	\$36,925.89	40.6%		\$21,926.40	\$14,999.49	-\$100.00
Installation	\$4,875.83	46.7%		\$2,597.08	\$2,278.75	
				00	\$982.33	
				19	\$3,518.96	
				07	\$1,485.07	
				75	\$23,264.61	
					\$55,229.35 List Price	
					-\$100.00 Courtesy Discount	
					\$55,129.35 Total	

Percentage of Equipment Total vs Labor Total

Percentage of Equipment Total: 50% = \$18,462.94

Actual Labor Total: = \$4,875.83

Done

Enhancement - Proposals/Print Menu/Contract: Increase the size of Contract Sections

The space allocated for the Product Guarantee, Price Guarantee and Message has been increased by 50% on both the regular Contract and the Custom Contract to accommodate more text.

GUARANTEE

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

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

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

PAYMENT TERMS	Payment
Deposit	Due when the proposal is accepted and signed. \$448.05
Payment 1	Due 10 days before the installation prewire phase. \$1,348.94
Payment 2	Due 10 days before the installation trim phase. \$897.29
Payment 3	Due 10 days before the installation final phase. \$1,348.94
Hold Back	Due at the completion of the installation. \$448.05

ELECTRONICS & INSTALLATION

Equipment	\$3,789.99
Installation	\$165.00
Misc. Parts	\$99.95
Wire & Cable	\$99.95
Additional Fees	\$197.95
Total	\$4,262.89
PST Tax	\$223.57
GST Tax	\$0.00
Grand Total	\$4,486.46

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: 8/22/2011

Enhancement - Proposals/Project: Product Install Locations

In the Proposal & Project/Product Line List and Detail screens you can add Product Install Location info. These Install Locations will appear on the Proposals/Areas & Products printout, as well as on the Project/Work Orders below each product.

Proposal - Product Detail 1 of 3 ? Home

LeRoy Asher
1291.1-1.100
Linn : 5125
Audio : Amplifier : Multi-channel

Product: 1 - Atrium

Qty: 1
Make: Linn
Model: 5125
SKU:
Finish: Silver
Description: Five channel power amplifier (Black)
Features: The Linn AV 5125 5-channel Class V modular power amplifier features the latest Linn switch mode power supply and amplification technology.

WO Install Location: **Location 1** (indicated by a red arrow)

Group: Audio : Amplifier : Multi-channel
Change Group: Original Audio
Product Classification: Product
Primary Install Phase: 3 Final
Tax A: T + Tax B: T
Do not Discount: Product Sort: m
Show Product as Option: Discontinued:
Staple Card:
Purchasing Lead Days: 7
Vendor: Linn Products
Linn : 5125 : Five channel power amplifier (Black) : Silver

Unit	Unit Price	Adjustment	Sell Updated: 6/2/2011	Product Unit Price w/Adjustment	Parts Unit Total	Wire Unit Total	Unit Installed Price Product Parts & Wire
ea	\$2,750.00		Cost Updated: 6/2/2011	\$2,750.00		\$480.00	\$3,230.00
	Minimum Sell			\$60.00		\$20.00	\$80.00 GP%
	Loaded Cost	40.0%		Installed \$2,810.00		\$500.00	\$3,310.00 40.2%
	Raw Cost			Labor Time: 1:00:00		0:20:00	1:20:00

Unit	Unit Price	Adjustment	Ext Sell	Product Ext Price w/Adjustment	Parts Ext Total	Wire Ext Total	Extended Installed Price Product Parts & Wire
ea	\$2,750.00		Ext Labor	\$2,750.00		\$480.00	\$3,230.00
	Minimum Sell			\$60.00		\$20.00	\$80.00 GP%
	Loaded Cost	40.0%		Ext Installed \$2,810.00		\$500.00	\$3,310.00 40.2%
	Raw Cost			Labor Time: 1:00:00		0:20:00	1:20:00

Proposal - Products Client Mode ? Home

LeRoy Asher
Home Entertainment System
1291.1-1.100

Adjust Selected Prices Update All Products Done
Replace Selected Products Delete All Options Product Total \$6,600.00

View	Auto Tag	Replace Product	Change Group	Zone - Area	Discipline	Make	Model	Sell Price Updated	Product Labor	Unit List	Adjusted Sell	Extended Sell
			Option	Phase	WO Install Location	Category	Type		Parts Labor	Min Sell	Unit Sell	Ext Installed
				1 - Atrium	Location 1	Linn	5125	6/2/2011	80.00	2,750.00	2,750.00	2,750.00
				Audio		Amplifier	Multi-channel			2,750.00	2,830.00	
				3		Five channel power amplifier			480.00	1,650.00	40.0%	
				1 - Atrium	Location 2	Linn	5125	8/2/2011	80.00	2,750.00	2,750.00	2,750.00
				Audio		Amplifier	Multi-channel			2,750.00	2,830.00	
				3		Five channel power amplifier			480.00	1,650.00	40.0%	
				1 - Atrium	Location 3	Linn	Akito	6/2/2011	80.00	1,100.00	1,100.00	1,100.00
				Audio		Source	Phono			1,100.00	1,180.00	
				3		Pick up tonearm Pick up tonearm :			0.00	660.00	40.0%	

A separate screen shows you all of the Install Location Notes.

Proposal - Products										Client Mode	Home		
Mike & Jessica Potter										Update All Products	Adjust Selected Prices	Done	
Security System 1282.1-1.100										Delete All Options	Replace Selected Products	Product Total \$45,819.90	
View	Auto Tag	Replace Product	Change Group	Zone - Area	Discipline	Phase	Make Category	Model Type	Sell Price Updated	Product Labor Parts Labor Wire Labor	Unit List Min Sell Unit Cost	Adjusted Sell Unit Sell GP%	Extended Sell Ext Installed Ext Discount
				1 - Basement	Audio	3	Linn Amplifier	5125 Multi-channel		80.00		2,750.00	2,750.00
				1 - Basement	Audio	3	Linn Speaker	Katan Bookshelf	7/1/2011	480.00	1,650.00	995.00	2,830.00
				1 - Basement	Audio	3	Linn Speaker	Katan Bookshelf	7/1/2011	287.50	597.00	995.00	4,975.00
				1 - Basement	Audio	3	Linn Speaker	Katan Bookshelf	7/1/2011	205.50	597.00	40.0%	5,262.50

Proposal - WO Install Location Notes										Done
Mike & Jessica Potter										Print Notes
Potter Inc										
Security System 1282.1-1.100										
Qty	Option	Zone - Area	Discipline	Phase	Make Category	Model Type	Work Order & Wire Manager - Install Location Notes			
1	ea	1 - Basement	Audio	2	Linn Multi-room	5101 Personal Handset Keypad	Linn 5101 Install Location			
1	ea	1 - Basement	Audio	3	Linn Amplifier	5125 Multi-channel	Linn 5125 Install Location rfsfsf			
5	pr	1 - Basement	Audio	3	Linn Speaker	Katan Bookshelf	Linn Katan Install Location			
		1 - Basement	Audio	3	Linn Speaker	Katan Bookshelf	Bookshelf loudspeakers: pair Bookshelf loudspeakers:			

Enhancement - Proposals/Print Menu: Product Locations are shown on Proposal Report
 The Product Install Location is now shown on the Proposal Areas/Products report and these can be turned on/off in the Proposal/Print Options screen.

Linn : Katan : Bookshelf loudspeakers: pair : Black	5 pr	\$4,975.00
Linn Katan Install Location		
Linn Katan Install Location		
Linn Katan Install Location		
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	1 ea	\$4,950.00
Linn Melodik Install Location		
VIDEO		
Runco : CL-610 : DLP Projector	1 ea	\$7,995.00
Runco CL-610 Install Location		
Sony : DVP-NS999ES : Progressive Scan DVD Player : Black	1 ea	\$1,099.95
Sony DVP Install Location		
AUTOMATION		
Linn : Knekt RCU : Knekt room control unit : White	1 ea	\$750.00
Linn Knekt RCU Install Locationbbbb		
Equipment		\$22,909.95
Installation		\$1,256.83
Misc. Parts		\$200.00
Wire & Cable		\$7,093.48
ZONE 1 - BASEMENT		\$31,460.26

Printer Setup | Proposal Prefs - Print Options | Home

hp LaserJet 1320 PCL 6, winspool,Ne03: Hayes Callahan

Home Entertainment System
1290.1-1.100

Done | Preferences

Areas & Products Report - Formatting

Yes No Page Break after each Area

Products - Do not Sort products by Discipline

Products - Show Product Install Location

Text - Hide Area Text

Text - Show only Area Text - No Products

Company Location

Company Location: 1
EME Audio & Video Systems

Product Listing

Enhancement - Projects/Product Detail Screens: View all Detail Screens in Project Mode

You can now View all of the Product Detail screens (Product, Specs, Pix, Labor, Parts, Wire and Tasks) in the Project Mode. You cannot make any changes, because this is a Project and changes need to be made through the Change Order module, but you can view all of the details.

Show All Products | Client Mode | Original Project - Products - View | All 4 Products | Done

Jim Engandela
Horizon Software
Home Entertainment System
1288.1-1.100

Areas	Products	Text	Install Location Notes	Product Labor	Unit List	Adjusted Sell	Extended Sell
Labor	Parts	Wire	Tasks	Parts Labor	Minimum Sell	Unit Sell	Ext Installed
Qty	Status	Zone - Area	Make	Model	Unit Cost	GP%	Ext Discount
View	No Discount	Discipline	Category	Type			
		Phase	Description				
2 ea	<input type="checkbox"/>	Dining Room	Linn	Knekt RCU	\$515.03	\$712.50	\$1,425.00
	<input type="checkbox"/>	Automation	Control	Keypad	\$210.00	\$750.00	\$2,015.03
	<input type="checkbox"/>	2	Knekt room control unit		\$264.20	\$450.00	-\$75.00
1 ea	<input type="checkbox"/>	Dining Room	Klipsch	RS-7	\$66.70	\$427.50	\$427.50
	<input type="checkbox"/>	Audio	Speaker	Bookshelf		\$450.00	\$516.70
	<input type="checkbox"/>	3	Reference Surround Speaker		\$205.50	\$236.50	-\$22.50

Super View | Original Project - Areas - View | Total Labor | Grand Total | Home

Mike & Jessica Potter
Home Theater System
1285.1-1.100

Areas	Products	Text	Equipment	Installation	Misc. Parts	Wire & Cable	Area Total	Labor Time
			\$22,909.95	\$995.83	\$200.00	\$3,041.20	\$27,146.98	15:20:00

Click on Area name to View Products

Products In: Zone 1 - Home Theater

Location	Zone	Sort	Area	Set	Sort Discipline	View	Qty	Make : Model	Unit Sell
1	m	Home Theater			m Audio		1 ea	Linn : 5125	\$2,750.00
					WO Install Location			Amplifier : Multi-channel	

Client Mode | Original Project - Product Detail View | 1 of 4 | Home

Jim Engandela Horizon Software
1288.1-1.100

Linn : Knekt RCU
Automation : Control : Keypad

Proposal Detail | Prev | Next

Product | Specs | Pkx - PDF's | Labor | Parts | Wire | Tasks | Dining Room

Qty: 2
Make: Linn
Model: Knekt RCU
SKU:
Finish: White
Description: Knekt room control unit
Features: Programmable, menu-driven control unit with display, timer and memory for comprehensive multi-room control.
Cue Notes:
Sell Price: \$712.50 ea

Group: Automation : Control : Keypad
Change Group: Original | Automation
Product Classification: Product
Primary Install Phase: 2 Trim
Tax A: T | Tax B: T
Do not Discount: | Product Sort: m
Show Product as Option: | Discontinued: | Staple Card:
Purchasing Lead Days: 7
Vendor: Linn Products
Linn : Knekt RCU : Knekt room control unit : White

Enhancement - Projects/Wire Supplement: Adjust Bulk Wire Home Runs

This Utility has been moved from the Wire Manager to the Wire Supplements screen so that it is more accessible. The Wire Detail and Wire Summary reports are also on this screen.

Proposal - Wire Supplements										Adjust Bulk Wire Home Runs		Home	
Mike & Jessica Potter										5000 Sq Ft		Update	
Security System 1282.1-1.100										150 ft per Home Run		Done	
Wire Total										\$6,082.40		Wire Manager	
Wire assigned to	Class	Bulk Run	No	Wire Qty	Wire & Cable	Install	Tax	Wire & Cable are Itemized					
Zone - Area	Qty	Make : Model	Type	Labor	Make : Model	Phase	A B	Unit Sell	Ext Sell				
1 - Basement	1	Linn : 5101 Personal	Bulk	Home	150 m Linn : K10 Cable	3	T T	\$5.00	\$750.00				
1 - Basement	1	Linn : 5125	Pre-Cut		1 pr Linn : Black Interconnect	3	T T	\$120.00	\$120.00				
1 - Basement	1	Linn : 5125	Pre-Cut		1 pr Linn : Black Interconnect	3	T T	\$120.00	\$120.00				
1 - Basement	1	Linn : 5125	Pre-Cut		1 pr Linn : Black Interconnect	3	T T	\$120.00	\$120.00				
1 - Basement	1	Linn : 5125	Pre-Cut		1 pr Linn : Black Interconnect	3	T T	\$120.00	\$120.00				

Enhancement - Projects /Wire Manager: New Wire Manager screen layout

The new Wire Manager screen layout makes it easier to add End Main Locations or End Products to each Wire. The Wire Class and Wire Make & Model is now shown.

Proposal - Wire Manager										Done	
Mike & Jessica Potter										AutoSet Wire ID's	
Security System 1282.1-1.100										Wire Chart	
Wire Labels											
Discipline	Source: Zone : Area : Make : Model	End: Zone : Area : Make : Model	Class	Source ID	Wire & Cable	Type	End ID				
Audio	1 - Basement : Linn : Katan	End: Lighting Control Panel	Bulk	Linn : K20 Cable	Loudspeaker cable	Room Run					
Bookshelf											
Audio	1 - Basement : Linn : Katan	End: Lighting Control Panel	Bulk	Linn : K20 Cable	Loudspeaker cable	Room Run					
Bookshelf											
Audio	1 - Basement : Linn : Katan	End: 1 - Home Theater : Linn : 5125	Bulk	Linn : K20 Cable	Loudspeaker cable	Room Run					
Bookshelf											

You can now choose to Assign Wires to both the Source & End or the Source and only Ends that have Products Assigned to them.

Proposal - Wire Manager										Done	
Hayes Callahan										AutoSet Wire ID's	
Home Entertainment System 1290.1-1.100										Wire Chart	
Wire Labels											
Discipline	Source: Zone : Area : Make : Model	End: Zone : Area : Make : Model	Class	Source ID	Wire & Cable	Type	End ID				
Audio	Atrium : Linn : 5101 Personal Handset	End:	Bulk	Src-0001	Monster : 16/2 Spkr Wire	Home Run	End-0001				
Keypad					2 Conductor Speaker Wire						
Keypad	Atrium : Linn : 5101 Personal Handset	End: - Bathroom 2 : Linn : 5101 Personal Handset	Pre-Cut	Src-0002	Linn : Black Interconnect		End-0002				
Keypad					Pair of phono-phono leads (Black						
Audio	Atrium : Linn : 5101 Personal Handset	End:	Bulk	0003	Monster : MVQUAD-B DB EZ500	Room Run	End-0003				
Keypad					RG6 Direct Burial MV-Quad Video						
Audio	Atrium : Linn : 5101 Personal Handset	End:	Bulk	0004	Linn : K10 Cable	Home Run	End-0004				
Keypad					Loudspeaker cable						
Audio	Bathroom 2 : Linn : 5101 Personal Handset	End:	Bulk	0005	Monster : 16/2 Spkr Wire	Home Run	End-0005				
Keypad					2 Conductor Speaker Wire						
Audio	Bathroom 2 : Linn : 5101 Personal Handset	End:	Cut	0006	Linn : Black Interconnect	End	End-0006				
Keypad					Pair of phono-phono leads (Black						

Enhancement - Projects/Wire Manager: Main Location Selector

The Main Location select has been changed from a Pop up list to a new screen which enables us to process important wire data after you make your selection.

Proposal - Wire Manager										Done	
Mike & Jessica Potter										AutoSet Wire ID's	
Security System 1282.1-1.100										Wire Chart	
Wire Labels											
Discipline	Source: Zone : Area : Make : Model	End: Zone : Area : Make : Model	Class	Source ID	Wire & Cable	Type	End ID				
		Security Cabinet									

You can also Edit the Main Location List in your Master Prefs directly from this screen.



Enhancement - Projects/Wire Supplement/Wire Manager: New Wire Chart Report

The Wire Chart report has been redesigned to organize the Wires by Discipline/ZoneArea/Product. The Wire Source is on the Left and the Wire End is on the right with the ID's next to each side. The Wire Source Location and End Locations for are shown under each product as well.

EME Audio & Video Systems - Confidential Report									
Wire & Cable Chart									
Mike & Jessica Potter Potter Inc									
Security System									
1288.1-1.100									
6/21/2011								Page 1	
Discipline Type	Source Zone - Area : Make : Model	Install Location Notes		End Zone - Area : Make : Model	Install Location Notes		End ID	Done	
Audio Bookshelf	1 - Basement : Linn : Katan	Linn Katan Install Location Linn Katan Install Location Linn Katan Install Location		1 - Basement : Linn : Katan	Linn Katan Install Location Linn Katan Install Location Linn Katan Install Location				
Src-0001	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0001	<input type="checkbox"/>	
Src-0002	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0002	<input type="checkbox"/>	
Src-0003	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0003	<input type="checkbox"/>	
Src-0004	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0004	<input type="checkbox"/>	
Src-0005	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0005	<input type="checkbox"/>	
Audio Bookshelf	6 - Home Theater : Linn : Katan	6HT Linn Katan Install Location		House Audio Head End					
Src-0006	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0006	<input type="checkbox"/>	
Src-0007	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0007	<input type="checkbox"/>	
Src-0008	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0008	<input type="checkbox"/>	
Src-0009	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0009	<input type="checkbox"/>	
Src-0010	Bulk	75 ft	Linn : K20 Cable	Loudspeaker cable			End-0010	<input type="checkbox"/>	
Audio Keypad	1 - Basement : Linn : 5101 Personal Handset	Linn 5101 Install Location		1 - Basement : Linn : Katan	Linn Katan Install Location Linn Katan Install Location Linn Katan Install Location				
Src-0011	Bulk	174 m	Linn : K10 Cable	Cable - R6 - Gray			End-0011	<input type="checkbox"/>	
Src-0012	Bulk	174 ft	Linn : K20 Cable	Loudspeaker cable			End-0012	<input type="checkbox"/>	
Src-0013	Bulk	174 ft	Linn : K400 Cable	Bi-wire speaker cable			End-0013	<input type="checkbox"/>	
Src-0014	Bulk	174 ft	Linn : K600 Cable	Tri-wire speaker cable			End-0014	<input type="checkbox"/>	

Enhancement - Projects/Purchase Orders: Product Prices

There are now 3 Product Cost Prices displayed on the Project Purchase Order screens.

1. The Master Cost is the Cost is the Net Cost on this Product in the Product Library.
2. The Project Cost is the Cost of this Product in your Proposal.
3. The PO Cost is the Cost of this Product on the actual Purchase Order.

You may now change any of these costs from this screen. When you click on one of these costs you will get a pop prompt to select which or all of the Cost Prices you wish to change. This enables you update your Product Library Cost or just this Project Cost right from the Purchasing screen.

The screenshot shows the 'Purchase Orders - All - 1 Products' screen for LeRoy Asher, project 1290.1-1.100. A message dialog titled 'Change Item Costs' is open, listing three options: 1 = PO Cost, 2 = PO Cost & Project Cost, and 3 = PO Cost & Project Cost & Master Product Cost. The '1 PO' button is selected.

Phase	Zone - Area	Make : Model	Updated	Master Cost	Project Cost	Qty Sold PO Cost	Qty Staged On Hand	Remaining to Order	Qty to Order	PO's to Date	On Order	Recvd to date	Still on Order
2		Linn : 5101 Personal Handset Universal	5/31/2011	\$8.00	\$8.00	5 ea	1	3		2		2	2

The screenshot shows the same 'Purchase Orders - All - 1 Products' screen. A message dialog titled 'Change Item Costs' is open, listing three options: 1 = Master Product Cost, 2 = Master Product Cost & Project Cost, and 3 = Master Product Cost & Project Cost & PO Cost. The '1 Master' button is selected.

Phase	Zone - Area	Make : Model	Updated	Master Cost	Project Cost	Qty Sold PO Cost	Qty Staged On Hand	Remaining to Order	Qty to Order	PO's to Date	On Order	Recvd to date	Still on Order
2		Linn : 5101 Personal Handset Universal	5/31/2011	\$8.00	\$8.00	5 ea	1	3		2		2	2

Enhancement - Projects/Work Order/Work Order Invoice: Product Locations

In the Project Work Order Invoice screen, if you choose the Project Item view mode, then each product on your Work Order will show its location info below each product. If you choose the Sum items view, then each product on the Work Order will show all of the Location data, from all like kind items the Product item.

Setup Delete WO **Work Order Detail Not Posted** Show Area Text Hide Time Prev/Next ?

WO Number 2025 - 1290.1-1.100 Post WO

WO Date 6/10/2011

Cyrissa Brain

Home Entertainment System
1290.1-1.100

Master Tracker Appointment

WO Total Time 2:20 Add

Additional Time Edit

WO Time Total 2:20

Requested Installer Edit

Appointment:

Create Continuation WO Pick List Done

Auto Set Installed Qty Install Tasks Print & Post View

Global Entry Total Left to Install 3 Total Time Edit Log

Sort	Zone - Area	Phz	Class	Install Location	Qty	Make	Model	Description	Serial Numbers	Item	Qty Installed	Left To Install	Install Time	Edit Log
1	Zone 1 - Atrium				1 ea	Linn	5125					1		
3	Product			Location 1			Five channel power amplifier							
1	Zone 1 - Atrium				1 ea	Linn	5125					1		
3	Product			Location 2			Five channel power amplifier							
1	Zone 1 - Atrium				1 ea	Linn	LK 140					1		
3	Product			Location 3			Two channel power							

Area Labor: 2:20:00 Zone 1 - Atrium

Zone 1 - Atrium - Work Order Notes

ID	PZ	Install Date	Labor Time	Qty	Make - Model
1	3		1:00:00	1 ea	Linn : 5125 Five channel power amplifier (Black) Location 1
1	3		1:00:00	1 ea	Linn : 5125 Five channel power amplifier (Black) Location 2
1	3		0:20:00	1 ea	Linn : LK 140 Two channel power amplifier Location 3

Enhancement - Projects/Utility/Admin: Update Product Info

This new Utility will update all of Product info on the Products in a Project to the current product info from the Product Library. Because a Project is sold it should only be changed by an administrator and that is why this utility is located on the Project/Admin screen.

 **Update Product Info**
This utility will update (relookup mainline) all of the Product info on the Products in this Project to the current product info from the Product Library.

Enhancement - Product Library/Phantom Product: Speed up search of Phantom Products

Speed Improvement when finding Phantom Products.

The screenshot shows the 'Product Library - Line List' interface. At the top, there is a search bar with 'Find Products' and 'Recent' buttons. Below the search bar is a navigation menu with letters A through Z. The main area contains the EME audio & video logo, a 'New Product' button, and a 'Detail List' button. On the right side, there are buttons for 'Inventory Control', 'Phan', 'Lab', 'Part', and 'Wire'. The bottom right corner shows '95 Items' and '4,750 Total'. A red arrow points to the 'Recent' button in the search bar.

Enhancement - Product Library/Recent Products: Remove Today calc-speed up Pick Products

The Today function has been changed from a calc to a global in the Product Library "Recent Products" feature and this speeds up the pick products routine when building a proposal.

The screenshot shows the 'Product Library - Line List' interface. At the top, there is a search bar with 'Find Products' and 'Recent' buttons. Below the search bar is a navigation menu with letters A through Z. The main area contains the EME audio & video logo, a 'New Product' button, and a 'Detail List' button. On the right side, there are buttons for 'Inventory Control', 'Phan', 'Lab', 'Part', and 'Wire'. The bottom right corner shows '4,746 Items' and '4,750 Total'. A red arrow points to the 'Recent' button in the search bar.

Displin	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Notes	Cue	Sell Price	Auto Tag	Fav	Hide
Audio	Multi	Keypad			Linn	5101	Personal Handset	Universal learning	Black			390.00 ea			
Audio	Ampli	Multi-channel			Linn	5125		Five channel power	Silver			2,750.00 ea			

Enhancement - Product Library/Main Line List: New Button Layout

The Inventory Control button is now on the Right side of the screen and enables access to the Inventory Count and Purchasing screens. The Data List button provides access to multiple List views enabling you to view your products in a variety of helpful ways. The Data Grooming button enables you to add Product Groups to Multiple products and add Product data in a List view.

The screenshot shows the 'Product Library - Line List' interface. At the top, there is a search bar with 'Find Products' and 'Recent' buttons. Below the search bar is a navigation menu with letters A through Z. The main area contains the EME audio & video logo, a 'New Product' button, and a 'Detail List' button. On the right side, there are buttons for 'Inventory Control', 'Phan', 'Lab', 'Part', and 'Wire'. The bottom right corner shows '133 Items' and '4,750 Total'. Two red arrows point to the 'Inventory Control' and 'Data Grooming' buttons.

Displin	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Notes	Cue	Sell Price	Auto Tag	Fav	Hide
Audio	Multi	Keypad			Linn	5101	Personal Handset	Universal learning	Black			390.00 ea			
Audio	Ampli	Multi-channel			Linn	5125		Five channel power	Silver			2,750.00 ea			
Audio	Sourc	Phono			Linn		Adikt	Moving-magnet				350.00 ea			
Audio	Sourc	Phono			Linn		Akito	Pick up tonearm	Black			1,100.00 ea			
Audio	Sourc	Phono			Linn		Akiva	Reference Moving Coil				2,950.00 ea			

Enhancement - Product Library/Data Grooming Utility: New screen GUI

The Data Grooming Utility screen has been re-designed to make it easier to Assign Groups to Multiple Products and to Tag the Desired Products, Replace the Make on the Tagged Products and to Sort Products without Groups, Class, Make, Model, Description, Cost, Sell Price and Unit to the top of the list so that you can enter the proper data.

The Data Grooming Utility is accessed from the main Product Library/Line List screen as well as on all of the Product Utility/Import screens so you can Groom your Data immediately after Import new Products into SCPS.

Product Library - Data Grooming Utility

AlphaFind: Make Hidden

4,750 Total Items
4,746 Selected Items

Sort "No Data" to the Top

Assign a Group to Multiple Products

1. Tag or UnTag desired product
2. Find (Tags) or desired products
3. Click "Assign Group to Many Products"

Discipline	Category	Type	Tag	Find	Make	Model	Unit Sell	Unit Cost	Auto Tag	Unit Fav	Hide
Audio	Multi-room	Keypad	<input type="checkbox"/>	<input type="checkbox"/>	Linn	5101 Personal Handset	390.00	ea	<input type="checkbox"/>	A	<input type="checkbox"/>
Product						Universal learning remote	234.00				<input type="checkbox"/>
Audio	Amplifier	Multi-channel	<input type="checkbox"/>	<input type="checkbox"/>	Linn	5125	2,750.00	ea	<input type="checkbox"/>	A	<input type="checkbox"/>
Product						Five channel power amplifier (Black)	1,650.00				<input type="checkbox"/>
Audio	Source	Phono	<input type="checkbox"/>	<input type="checkbox"/>	Linn	Akito	1,100.00	ea	<input type="checkbox"/>		<input type="checkbox"/>
Product						Pick up tonearm	660.00				<input type="checkbox"/>

Enhancement - Product Library/Product Detail and Purchasing: Order Now indicator

This Order Now flag will also appear on the new Product/Library/Inventory Control/Purchasing screen and you can sort all of the items with the "Order Now" flag to the top of the screen.

Product Library - Purchasing

AlphaFind: Make Hidden

4,746 Items
4,750 Total

Find Desired Products
Click Show "Order Now" button

Disph	Cat	Type	Class	Make	Model	Quantity On-Hand	Optimum Qty	Order Now	Qty to Order	Order Amount
Audio	Multi	Keypad	<input type="radio"/>	Linn	5101 Personal Handset	2	7	Order Now	5	\$1,170.00
Audio	Ampli	Multi-channel	<input type="radio"/>	Linn	5125	4	6	Order Now	2	\$3,300.00
Audio	Sourc	Phono	<input type="radio"/>	Linn	Akito	5	6	Order Now	1	\$660.00
Audio	Sourc	CD Player	<input type="radio"/>	Linn	Classik Music-B	5	6	Order Now	1	\$930.00
Audio	Ampli	Surround Receive	<input type="radio"/>	Linn	Classik Movie DI-G	15	6		0	
Audio	Speak	Center Channel	<input type="radio"/>	Linn	Ekwal	5	6	Order Now	1	\$780.00

If the Optimum Qty is greater than the Quantity on Hand (this comes from the Inventory Control Count screen) then the Order Now flag will appear.

Inventory

	Qty	Cost Value
Quantity On-Hand	2	\$468.00
Optimum Qty	7	\$1,638.00
Order Now - Order Qty	5	\$1,170.00
Delivery Lead Time	7 Days	

Enhancement - Product Library/Product Detail: Improved Screen GUI and New Features

Find Products Replace Data **Product Library - Product Detail** 1 of 152 ? Home

Linn
5101 Personal Handset
 Universal learning remote
 Audio : Multi-room : Keypad

Product Created: 1/8/2002
 Sell Price Updated: 7/1/2011
 Cost Price Updated: 7/1/2011

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

Make Linn **Sell Price** \$390.00 ea
Model 5101 Personal Handset
SKU
Finish Black

Description Universal learning remote
Features Programmable, high-power, long range, infra-red remote control for hand held or table top operation

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

Unit	Net Price	Loading Calculator	Update	Loaded Price
ea		Adjustment Type %		
Sell	\$390.00			Sell \$390.00
Minimum Sell	\$300.00	GP 22.0%		GP 40.0%
Net Cost	\$234.00			Cost \$234.00

Group Audio : Multi-room : Keypad
Product Classification Product
Primary Install Phase 2 Trim

Status
 Tax A T + Tax B T
 Favorite A Fee SKU Phantom Product

Options
 New Item Discontinued Item
 Do not Hide Hide this Item
 Do not Delete Do not Discount
 Proposal Sort m Issue WO Staple Up Card

Inventory

	Qty	Cost Value
Quantity On-Hand	2	\$468.00
Optimum Qty	6	\$1,404.00
Order Now - Order Qty	4	\$936.00
Delivery Lead Time	7	Days

Product	Supplements	Installed Price
Product	Parts	Wire
\$390.00	\$1,085.00	\$1,312.50
\$610.00	\$50.00	\$202.50
\$1,000.00	\$1,135.00	\$1,515.00
		Total \$3,650.00

Purchasing
 Product Description (Purchase Order) 345 Fuses
Buy Option Enable ? **Set Cost**
 Buy Qty 10 ea Buy Unit Bag Buy Unit Cost \$4.00
Alternate PO Vendor ?
 Optional Cost ? Optional Vendor ?

Installation
 Product Description (Work Order & Wire Manager) ?
 Product Installation Notes (Work Order)

Enhancement - Product Library/Product Detail: Purchasing & Work Orders Descriptions

In addition to the regular Product Description you can now add Purchasing (PO) and Installation (WO) Descriptions to your products. These descriptions will override the regular description on your Project Purchase Orders and on your Project Work Orders.

Purchasing PO Description Remote ?

PO - Buy Option ? **Set Cost**

Enable Buy Qty 5 ea Buy Unit Box Unit Cost \$2,340.00

Alternate PO Vendor ?

Optional Cost ? \$250.00 Optional Vendor Capitol Sales Company

Installation
 WO Description Remote Control
Installer Notes
 Be sure to programming this remote control to the users requirements.

Enhancement – Product Library/Product Detail: Buy Package Option

A new Buy Package Option feature enables you to enter a Package kind and the number of item in that Package. The Project Purchase Order will automatically calculate the package quantity based and the unit quantity required for the Project. The Set Cost button will automatically calculate the Cost of the Package based on the Net cost of the product and the Buy Pkg Qty.

PO Buy Option:

Enter a Buy Pkg, a Buy Pkg Qty, a Buy Pkg Cost and check the PO Buy Option box.

SCPS Project Purchase Orders will divide the actual Project Qty with the Buy Pkg Qty and show the Qty of Buy Packages and Buy Pkg Cost on the PO.

Example: Project Qty (3750) / Buy Pkg Qty (1000 box) = PO Qty (4 rounded up)

ea	Unit	Net Price	Loading Calculator	Update	Loaded Price
List			Adjustment Type %		
Sell		\$19.95			Sell \$19.95
Minimum Sell		\$15.00	GP 66.7%	% \$	GP 74.9%
Net Cost		\$5.00			Cost \$5.00

Purchasing	
Product Description (Purchase Order)	5101 Fuses ?
Buy Package Option ?	<input checked="" type="checkbox"/> Enable Set Cost
Buy Pkg	Box Buy Pkg Qty 10 ea Buy Pkg Cost \$50.00
Alternate PO Vendor	?
Optional Cost	? Optional Vendor

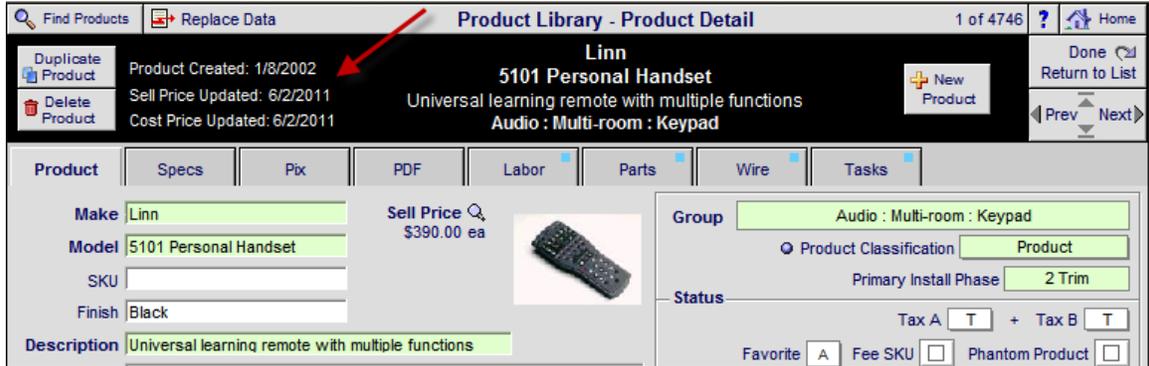
A blue indicator will appear on that Product in the Project Purchase Order screen when the Buy Package Option is engaged.

2	Linn : 5101 Personal Handset	Black	Linn Products	1 ea		0	1	1	0
	Remote	6/2/2011	\$234.00	\$234.00		2			

Purchase Order Detail									
Setup		Delete PO		Vendor Address		Ship To Address		7/7/2011 Post PO	
PO Number 1083 - 1293.1-1.100			Linn			EME Audio & Video Systems			Done
User PO #						100 Purchasing Lane			Print
PO Date 7/7/2011						Purchasing City, WI 567937			Buy Pkg
Buyer: Joe Buyer			1293.1-1.100			Mike & Jessica Potter			Receiving
Buyer Override:						PO Total \$306.00			Auto Receive
Shipping Method: Best Way									All PO Items
PO Terms:									Date Received
PO Notes:									Received By
Order Qty	Make	Model	Finish	Unit	Raw Cost	Ext	Raw Cost	Receive	Qty
Buy Qty	Description							View-Edit	Qty
10 ea	Linn	5101 Personal Handset	Black	\$50.00	\$50.00			1	0 Box
1 Box	5101 Fuses		note:					Rcv'd: 7/7/2011	By: Qty: 1
2 ea	Sony	SLV-N99		\$128.00	\$256.00			2	0 ea
2 ea	VHS Video Cassette Recorder		note:					Rcv'd: 7/7/2011	By: LB

Enhancement - Product Library/Product Detail: Cost and Sell Price List Updated dates

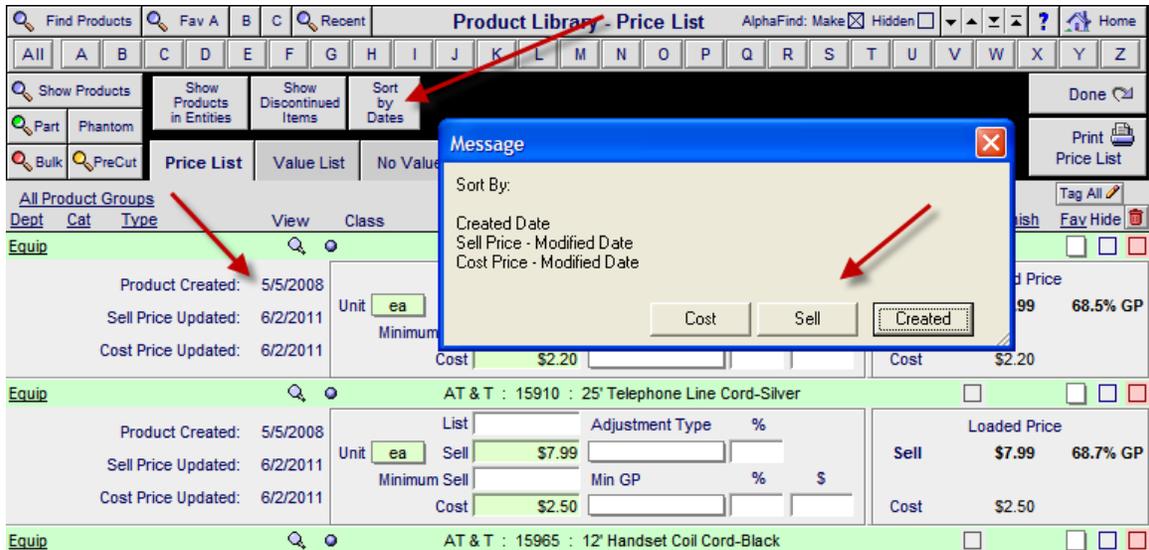
When you change the Cost or Sell Price in the Product Library the Updated Dates and the SCPS User who made the change will be updated. When you Import Products using the SCPS Import Utilities all of the newly imported Products will be stamped with the current date and SCPS user. These dates are shown in the Product Library Detail and Specs screens and shown in the Proposal Product List and Proposal Product Detail screens as well as the Project Purchasing screens. This will help you keep your product prices as current as possible.



You can manually Update all of your Product Dates using the Product Library/Product Utilities/Update utility.



You can Sort (in Ascending or Descending order) all of your Products by the Creation Date, the Sell Modified Date or the Cost Modified Date.



The Master Cost Updated Date also shows on the Project Purchase Order screen.

Purchase Orders - All - 23 Products													
John & Mary Smith 1284.1-1.100										Qty Remaining to Order Products 26 Parts 18 Wire 2,510	Still on Order 6	Create PO Auto Set Qty to Order	Leave View P.O.'s
Phase	Zone - Area	Make : Model	Finish	Vendor?	Qty Sold	Qty Staged	Remaining to Order	Qty to Order	On Order	Recvd to date	Still on Order		
CO#	PO Description	Updated—Master Cost	Project Cost	PO Cost	On Hand								
3		Klipsch : RC-35 Center Channel	6/2/2011	Black \$210.00	Klipsch Audio \$210.00	1 ea	-2	1					
3		Klipsch : RF-35 Reference	6/2/2011	Black \$282.50	Klipsch Audio \$282.50	2 ea	-4	2					
3		Klipsch : RS-7 Reference	6/2/2011	Matte \$238.50	Klipsch Audio \$238.50	2 ea	-4	2					
3		Klipsch : RSW-10 Reference	6/2/2011	Black \$525.00	Klipsch Audio \$525.00	1 ea	0	1					
2		Linn : 5101 Personal Handset Remote	6/2/2011	Black \$234.00	Linn Products \$234.00	1 ea	2	0	1	1	0		

Enhancement - Product Library/AlphaFinder: Make Name Grooming Utility

If you want to change the name of a Make on many products at one time you can use the new Make Name Grooming Utility. Once you click on the AlphaFinder character you want you will see the Groom Make Utility button.

Product Library - Line List													
AlphaFind: Make <input checked="" type="checkbox"/> Hidden <input type="checkbox"/>										153 Items 153 Total	New Product Inventory Control	Detail List Phan Lab Part Wire	Leave Product Sets Print Menu
Displin	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Cue	Notes	Sell Price	Auto Tag
Audio	Speak	Center Channel			Klipsch	RC-35		Center Channel	Black			399.00 ea	
Audio	Speak	Floor			Klipsch	RF-35 (6483)		Reference Tower	Black			499.00 ea	

Groom Make Utility | Product Library - AlphaFind by Make = S

The Groom Make Utility will remove unwanted Makes from the list

Refresh the Pick Make List

Click the Refresh button, if you see duplicate Makes or you do not see all Makes in the List

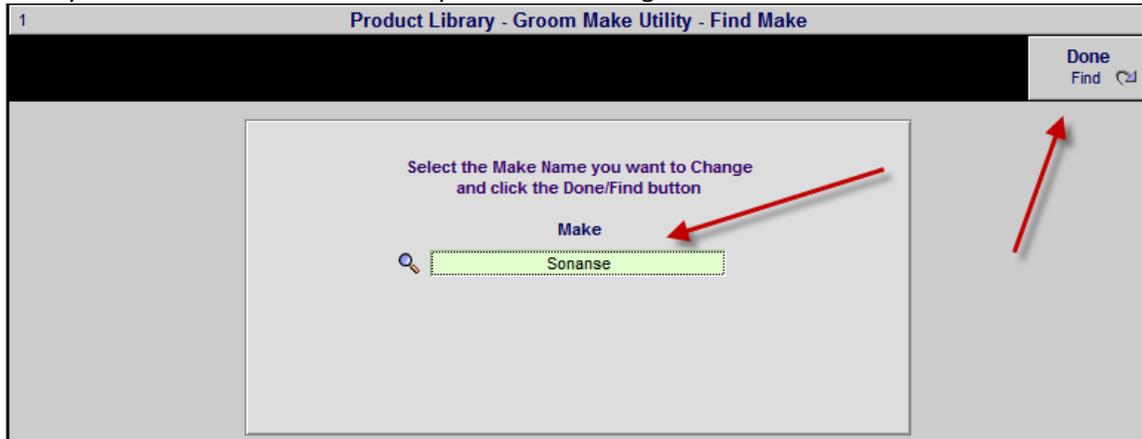
Pick Make

- Sonance
- Sonance
- Sony

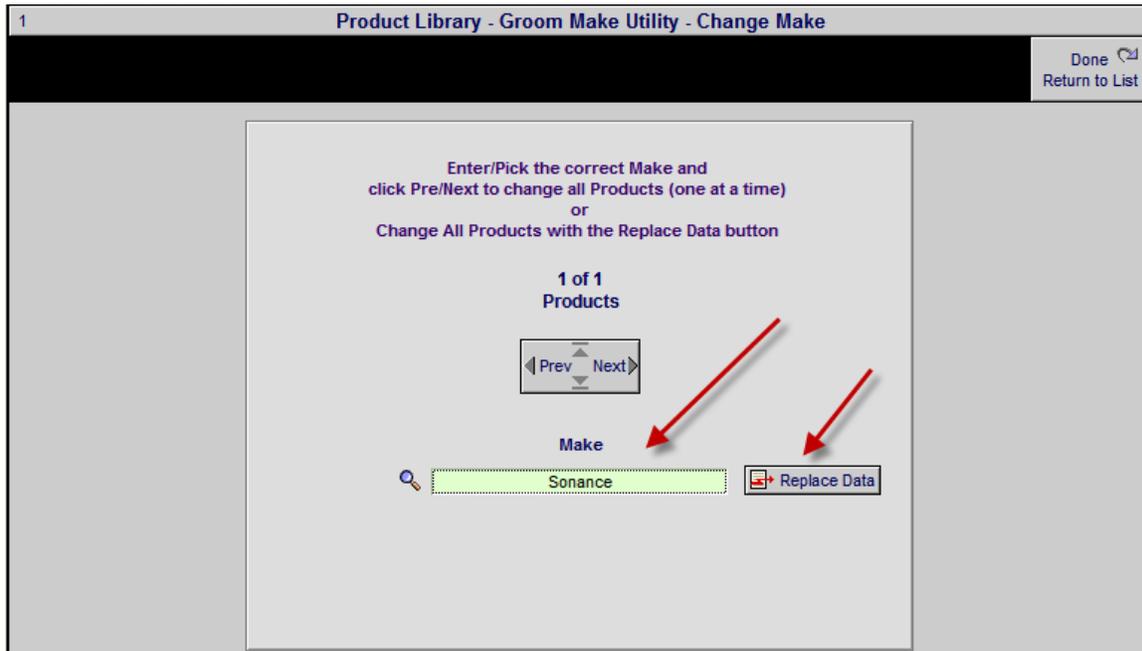
When you add a new Make to the product library, the Make List will need to be Refreshed

Cancel

Then you can select the Make Name you want to change.

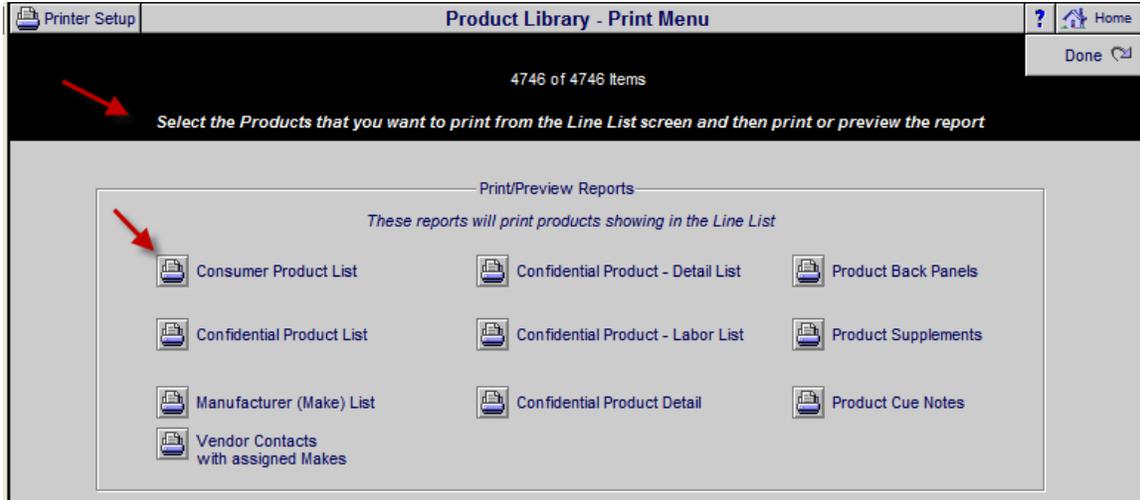


Then you can change the Make name and click on the Replace button to change all of the Products with the old name to the new name.



Enhancement - Product Library/Print Menu: Consumer Price List Report

A Consumer Price List report that can be shown to customers has been added to the Product Library Print Menu. You can first select the Products you want to show on this report and then go into the Print Menu and Print it.



6/16/2011

Consumer Product List

Page: 1

	Make	Model	Description	Sell Price MSRP Price
	Linn	5101 Personal Handset	Universal learning remote Programmable, high-power, long range, infra-red remote control for hand held or table top operation	390.00 ea 450.00 Black
	Linn	5125	Five channel power amplifier The Linn AV 5125 5-channel Class V modular power amplifier features the latest Linn switch mode power supply and amplification technology.	2,750.00 ea Silver
	Linn	Akito	Pick up tonearm Reliable, rigid tonearm designed to do justice to a wide range of cartridges.	1,100.00 ea Black

Enhancement - Master Tracker/Task Manager: Past Task Indicator

When you choose to show Past Tasks in the Tracker, this check box will be checked indicating what state the Tracker is in.

The screenshot shows the Master Tracker interface. On the left, there is a filter menu with a 'Past' checkbox checked. A red arrow points to this checkbox. The main area displays a summary for Saturday, June 4, 2011, with 270 items and 629 total. Below this is a table of tasks with columns for Due Date, Tracker Item, Proposal Project, Item Owner, Total Labor, and Total Pymts. Two tasks are listed for 10/13/2005, both marked as 'New Task' and assigned to Jim Engandela.

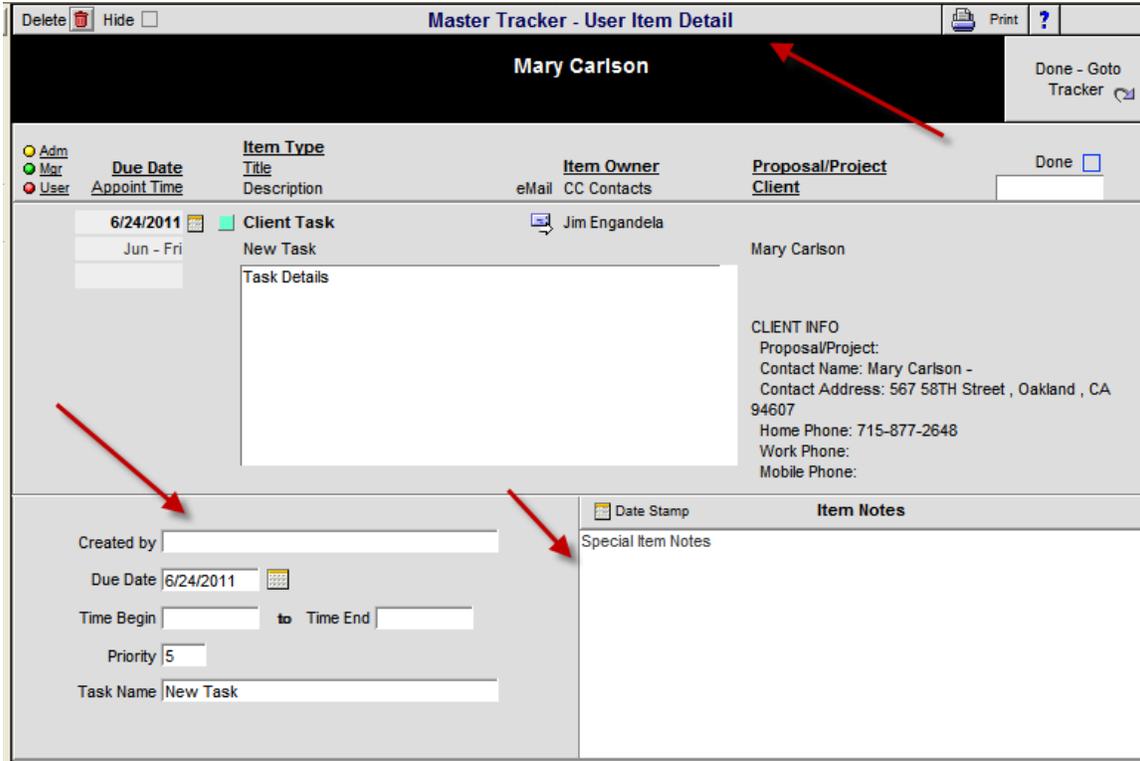
Enhancement - Master Tracker/Appointment Task: Add End Time field to Task Detail

You can now enter the End Time of an appointment in the Master Tracker.

The screenshot shows the 'Task for User' detail form for Tali Berger. The form includes fields for Assigned To (Jim Engandela), Created by, Due Date (5/31/2011), Time Begin (6:00:00 PM), Time End (7:00:00 PM), Priority (5), Task Name (New Appointment), and Task Description. A red arrow points to the 'Time End' field.

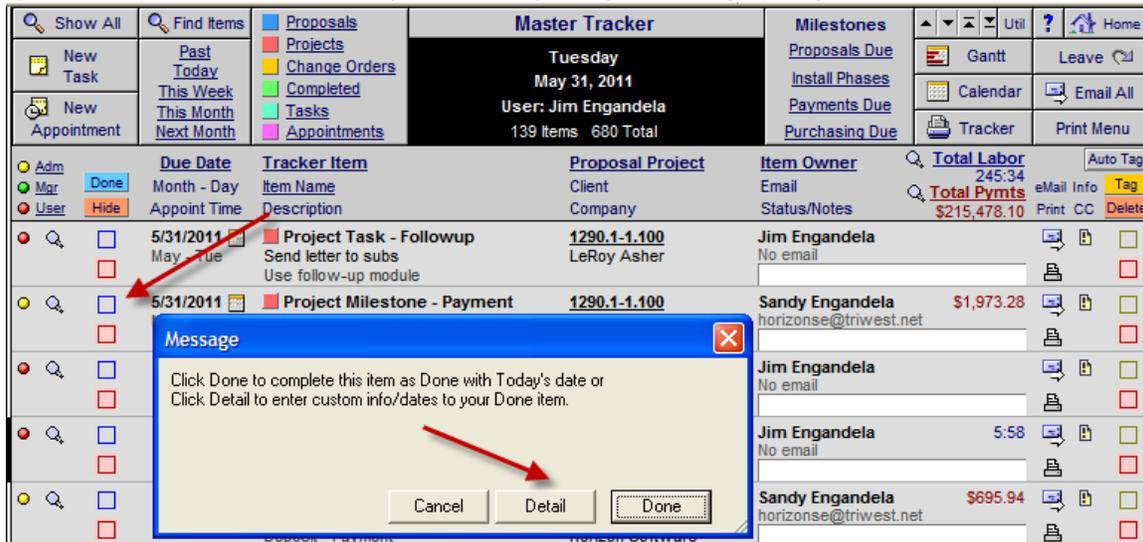
Enhancement - Master Tracker/User Item Detail: New screen similar to regular Tracker Tasks

Viewing the Detail of a User Item Task or Appointment now displays the information in a screen similar to the Proposal/Project Tasks. The Item Notes and Appointment details are also available on this screen. The Print button also prints a report with this information



Enhancement - Master Tracker/Done: Option to add detail when completing a task.

When you complete a task in the Master Tracker you can click on the Done checkbox. You now will have an option to Auto Stamp the Done Date (today) on the Task or to click on the Detail option to add details to the Task you are completing, including editing the Done date.



Adm	Due Date	Item Type	Item Owner	Proposal/Project	Done
Mar	Appoint Time	Title	eMail	Client	
User		Description	CC Contacts		
	6/9/2011	Project Milestone - Install	Jim Engandela	1288.1-1.100	5/31/2011
	Jun - Thu	Install Hours		Mr. Jim Engandela	
		Phase 1 - Prewire - Installation		Horizon Software	
				Home Entertainment System	
				CLIENT INFO	
				Proposal/Project: 1288.1-1.100	
				Contact Name: Mr. Jim Engandela - Horizon Software	
				Contact Address: S. 15700 Hwy U., Strum, WI	
				54770	
				Home Phone:	
				Work Phone: 715-287-3335	
				Mobile Phone:	

Payment Step	Date Stamp	Item Notes
Install Phase		
1		
Install Phase Labor		
1 - Installation	1:09:36	
5 - Wire Labor -	4:48:50	
Total Labor Hours	5:58:26	

Fix - Proposal/Wire Supplements: Labor Adjustment now track Wire Supplement Qty Changes

When changing Wire Supplement quantities in a Proposal the Labor associated with those wire supplements now increases and decreases properly even if the Labor is set to zero and then increased.

Some wires that were added to older SCPS version may not change and we have added this note (when you change the qty) so that you can manually change the Wire Labor on these Wires.

Please note:

This Wire has Legacy Labor Values associated with it.

Changing the Wire Length will not change its Labor.

Change the Wire Labor from the Labor Supplement Screen.

Product	Specs	Pix - PDF's	Labor	Parts	Wire	Tasks	Atrium			
Wire Make: _____ Model: _____ Wire & Cable Product Qty: 1							<i>Only products classified as "Wire" can be added Wire & Cable are Itemized</i>			
Class	Bulk Run Type	No Labor	Total Qty	Wire Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell
Bulk	Home		750	Linn	K10 Cable	Loudspeaker cable	1	3.00	5.00	3,750.00
Bulk	Home		750	Monster	16/2 Spkr Wire	2 Conductor Speaker	1	0.15	0.45	337.50
Bulk	Room		75	Monster	MVQUAD-B DB EZ500	RG6 Direct Burial	1	0.60	1.80	135.00
Pre-Cut			3 pr	Linn	Black Interconnect	Pair of phono-phono	1	72.00	120.00	360.00

Fix - Proposal/Area & Products: Pick Product Sets – Auto Add Area Text

Area Text added to a Product Set now correctly is added, to the Area chosen, when picking the Set instead of being added to the first Area in your Proposal.

Clear All Proposal Area Text **Proposal - Area Text** ? Home

Jim Engandela
Horizon Software
Home Entertainment System
1267.1-1.100 Done

Areas	Text	Products
Labor	Parts	Wire
Tasks		

1 - Pick Area	2 - Pick Text Category	3 - Pick Video Text
<input type="checkbox"/> Atrium <input type="checkbox"/> Zone 1 - Home Theater <input type="checkbox"/> Zone 2 - Living Room <input type="checkbox"/> Zone 3 - Office <input type="checkbox"/> Zone 4 - Dining Room <input type="checkbox"/> Zone 4 - Kitchen <input type="checkbox"/> Zone 5 - Master Bedroom <input type="checkbox"/> Zone 5 - Master Bathroom	<input type="checkbox"/> Audio <input type="checkbox"/> Commercial Sound <input type="checkbox"/> Control <input type="checkbox"/> Installations <input type="checkbox"/> Jacks <input type="checkbox"/> Racks <input type="checkbox"/> Rooms <input type="checkbox"/> Security <input type="checkbox"/> Systems <input type="checkbox"/> Vacuum <input type="checkbox"/> Video	<input type="checkbox"/> Camera <input type="checkbox"/> Theater design <input type="checkbox"/> Theater equipment <input type="checkbox"/> Theater linn active <input type="checkbox"/> TV - front projection <input type="checkbox"/> TV- monitor television <input type="checkbox"/> TV - rear projection

Products in: Zone 4 - Dining Room **Proposal Text for: Zone 4 - Dining Room** Add to Library

This area includes the following products and features.
 A pair of ceiling speakers will provide beautiful music and blend in with the decor of this area. these speakers can be painted or wall papered and can easily upgraded in the future.
 Set Area Text Test

Fix - Proposal/Payment: unHide Portal Displays

Some Payment Portals were not being shown (in Manual Payment Method Mode) if the Proposal/Print Menu/Print Option/Do not show Labor DOD on the Labor Report checkbox was checked. This has been fixed.

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

Betsy Hawley Done with Update

Dealer Payment Plans Video System Installation Type
3170.1-1.2 Retro-3 Phase Pre plus Trim plus Final

Payment Method <input type="button" value="Manual All"/> Update Payment Labels Payment Description Total Payments:	Deposit Deposit Due when the proposal is accepted and signed. Amount	Step 1 Payment Payment 1 Due 10 days before installation of the prewire phase. Amount	Step 2 Payment Payment 2 Due 10 days before installation of the prewire phase. Amount	Step 3 Payment Payment 3 Prior to delivery Amount	Holdback Retainer Retainer Amount
---	--	---	---	---	---

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

Payment Step Director Settings
 Step 1 Step 2 Step 3
 1 2 3
 Director Director Director

Warning: The Proposal Total and the Payment Total must be equal to each other!

Totals	Update
Proposal	\$3,631.70
- Payments	
Difference Must = \$0	\$3,631.70

Labor Listing

Do not show Labor Hours on Proposal Views Reports

Do not show DOD on Labor Detail Report

Fix - Proposal/Info: Changing Master Tracker Dates, retains entered date.

Depending on what screen you enter the Proposal/Info screen from, the existing tracker dates would revert back to the default dates when you attempted to change them and use the Auto Update feature. This has been corrected.

Installation & Payment Type Update

New-2 Phase Pre-Trim

Installation Phases Update

Install Start Dates

1 - Prewire

2 - Trim

Target Project Completion Date.....

Fix - Proposal & Project Tracker: Auto Updating Tasks and Milestone Dates

The auto setting of task dates based on your default days for each task has been improved so that it functions properly under all conditions.

Hide	Done	Done Date	Due Date	WBS	Type	Task Name	Description	Item Owner
<input type="checkbox"/>	<input type="checkbox"/>		9/25/2011		Task - Discovery	Client Profile	Interview client & complete	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		9/30/2011		Task - Discovery	Walk Through	Gather project details	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		10/2/2011		Task - Review	Design & Engineering	Review client profile with	Jon Oster
<input type="checkbox"/>	<input type="checkbox"/>		10/3/2011		Task - Followup	Send letter to Client	Send Post interview letter to	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		10/5/2011		Task - Review	Sales Review	Review client profile with	
<input type="checkbox"/>	<input type="checkbox"/>		10/10/2011		Milestone - Proposal	Proposal Due	Present proposal to client	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		10/12/2011		Task - Followup	Send letter to Client	Post proposal letter	Jim Enqandela

Fix - Contact/Contact Detail: Add New Task. Clear Project Keys

When creating a Task, from a Contact, the last Project Key value was not being cleared and this caused the Task to display the Project info, instead of the new Task Contact info, even though it was assigned to the correct contact. This has been fixed.



**End of
SCPS Version 8.2v1
Revisions**

SCPS Version 8.1v1
Released: 5/24/2011

Enhancement – Proposal/Products: Auto Tag Delete

You can now Auto Tag or Clear all of the Delete Check Boxes on all of the products showing on this screen. First click on an underlined Area, Discipline, or Phase to select all of those Products and then click the Auto Tag button and check all of the Products and then click the Delete Icon to Delete them all from your Proposal.

Proposal - Products									
Rudy & Cecilia Defiglia					Adjust Selected Prices		Update All Products		Done
Home Entertainment System 1292.1-1.100					Replace Selected Products		Delete All Options		Product Total \$14,170.00
View	Replace Product	Change Group	Zone - Area	Make	Model	Product Labor	Unit List	Adjusted Sell	Extended Sell
Auto Tag		Option	Discipline	Category	Type	Parts Labor	Min Sell	Unit Sell	Ext Installed
			Phase			Wire Labor			Ext Discount
<input type="checkbox"/>			1 ea <u>Atrium</u>	<u>Klipsch</u>	<u>RS-7</u>	57.50	450.00	450.00	450.00
			Audio	Speaker	Bookshelf			450.00	507.50
			3	Reference Surround Speaker		205.50			
<input type="checkbox"/>			1 ea <u>Atrium</u>	<u>Klipsch</u>	<u>RS-7</u>	57.50	450.00	450.00	450.00
			Audio	Speaker	Bookshelf			450.00	507.50
			3	Reference Surround Speaker		205.50			

Enhancement – Proposal/Client/Project: Improved Report Printing

All Client, Client Billing, Project, Info, Site Maps, Contacts and Communication log reports have been graphically improved and the Print All function now prints all of these reports at one time.

Proposal - Client			2915		Print
Ann & Bob Traaseth					
Home Automation 1279.1-1.100					
Client		Project		Client Follow-Up Letters	
Info		Contacts		Com Log	
Client			Numbers		
First Name: Ann & Bob			Home Phone: 715-287-4770		
Last Name: Traaseth			Work Phone:		
Company:			Ext:		
Proposal Name: Ann & Bob Traaseth			Ext:		
Fav Format: First Name + Last Name					
Address			Message		
Address 1: 567 58TH Street			Print just This screen info or All Client & Project Info?		
Cross Street:			Cancel All This		

Enhancement – Project/Utility/Export: Export Project Products to dbf file

You can now Export all of the Products in a proposal to a dbf file that can be opened by Excel. This report does not include supplements.

	Export this Project as a dbf File This utility will export this Project Products into a file you can open with Excel.
	Export includes these Product Fields QTY - UNIT - MAKE - MODEL - DESCRIPTION - FINISH DISCIPLINE - CATEGORY - TYPE - CLASS - PHASE UNIT_COST - UNIT_SELL - UNIT_LABOR - TAX

Enhancements – Project: Sales Invoices, PO’s, Work Orders

- Speed up entrance into SI, WO, PO
- Remove Sorting All Parts & Wire Records
- Set Parts & Wire to Fast Open screen when exiting modules.
- Correctly Select Parts & Wire by Phase
- Sort PO & SI by Make/Model.
- Sort WO by Zone/Area/MakeModel
- Auto Clear Products, Parts, Wire, Labor, Fees entering Invoice/PO’s WO’s
- Add Product/Part/Wire Quantity to screen headers

Enhancement – Project Payment Reports – Enhancements to all Reports

All of these Project reports have been improved to include all payment steps and to print properly from their associated screens.

- Proposal Payment report
- Pending Change Order Payment report
- Final Change Order Payment report
- Master Project Payment report
- Master Project All Final Change Order Payment report

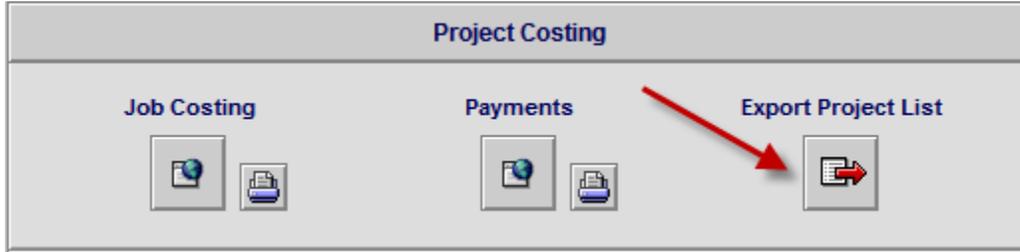
Enhancement – Master Project/Payments/View All CO’s. Add Pymt fields

Add CO Payment Made 2 and 3 fields to screen so that multiple CO payments can be logged in from the Master Project making it unnecessary to go into each CO to make these entries.

Project Manager - All Final Change Orders							Print	Home
John & Mary Smith							Done	
Home Entertainment System 1284.1c2-1.100							View All Change Orders	
	Deposit	Payment 1	Payment 2	Payment 3	Retainer	Total		
Total CO Amount	\$0.00	\$10,025.84	\$7,519.38	\$7,519.38	\$0.00	\$25,064.59		
-Total CO Payments			\$568.00			\$568.00		
Total Change Order Balance Due	\$0.00	\$10,025.84	\$6,951.38	\$7,519.38	\$0.00	\$24,496.59		
Change Order	Change Order Totals	\$0.00	\$10,596.95	\$7,947.71	\$7,947.71	\$0.00	\$26,492.37	
1284.1c2-1.100	Payment Due Date	3/28/2011	3/28/2011	3/28/2011	3/28/2011	3/28/2011		
	Add CO Pymt Invoice	<input type="button" value="+ Invoice"/>						
	Date Invoiced		4/29/2011					
Date Sold: 9/12/2006	- CO Payments Made 1		\$568.00			\$568.00		
	Pymt Made Dates		4/13/2011					
	Pymt Notes		ck465					
	- CO Payments Made 2							
	Pymt Made Dates							
	Pymt Notes							
	- CO Payments Made 3							
	Pymt Made Dates							
	Pymt Notes							
	Change Order Balance Due	\$0.00	\$10,596.95	\$7,379.71	\$7,947.71	\$0.00	\$25,924.37	

Enhancement – Project Manager: Export Project List

You can export a List of all of your Projects and name the file and choose a location to save the file.



1288.1-1.100	Engandela, Jim	Horizon Software	Home Entertainment System	4/25/2007	6959.39
1286.1-1.100	Hagen, Gary		Whole House Music System	9/12/2006	17665.66
1285.1-1.100	Potter, Mike & Jessica		Home Theater System	9/12/2006	30646.68
1284.1-1.100	Smith, John & Mary		Home Entertainment System	9/12/2006	96498.60
1275.1-1.100	Goss, Dennis		Central Vacuum System	9/12/2006	25583.58
1268.1-1.100	Berkow, Dana		Home Entertainment System	9/12/2006	70559.78

Enhancement – Master Tracker: Project Change Order numbers

Project Change Order numbers are now shown on Project Change Orders Tasks.

Show All		Find Items		Proposals		Master Tracker		Milestones		Util		Home	
New Task		Past Today		Proposals		Thursday		Proposals Due		Gantt		Leave	
New Appointment		This Week		Projects		May 12, 2011		Install Phases		Calendar		Email All	
		This Month		Change Orders		User: Jim Engandela		Payments Due		Tracker		Print Menu	
		Next Month		Completed		35 Items 153 Total		Purchasing Due					
				Tasks									
				Appointments									
Adm	Due Date	Tracker Item		Proposal Project		Item Owner		Total Labor		Auto Tag			
Mgr	Month - Day	Item Name		Client		Email		81:50		eMail Info		Tag	
User	Appoint Time	Description		Company		Status/Notes		\$17,234.90		Print		CC Delete	
<input type="checkbox"/>	5/12/2011	Proposal Task - Discovery		1294.1-1.100		Jim Engandela							
<input type="checkbox"/>	May - Thu	Client Profile		Hayes Callahan		No email							
<input type="checkbox"/>		Interview client & complete client profile											
<input type="checkbox"/>	5/12/2011	Project Task - Followup		1293.1-1.100		Jim Engandela							
<input type="checkbox"/>	May - Thu	Send letter to subs		Rudy & Cecila Defiglia		No email							
<input type="checkbox"/>		Use follow-up module											
<input type="checkbox"/>	5/12/2011	Project Task - Project Mgmt		1293.1-1.100		Joel Roberts							
<input type="checkbox"/>	May - Thu	Project Management Notice		Rudy & Cecila Defiglia		No email							
<input type="checkbox"/>		Notify Management of start of Project											
<input type="checkbox"/>	5/12/2011	CO Task - Project Mgmt		1293.1c1-1.100		Joel Roberts							
<input type="checkbox"/>	May - Thu	Project Management Notice		Rudy & Cecila Defiglia		No email							
<input type="checkbox"/>		Notify Management of start of CO											

If you check the Find All Project Tasks including CO's you will get all of the Master Project and all of the Change orders for that Project shown.

Clear All Entries | **Master Tracker - Find Tracker Items**

Enter find criteria and click the Done/Find button

Done Find 
Cancel

Task

Item Type
Item Name
Description

Date Range

Today 5/13/2011
Start Date to End Date

Milestones (select one) Show

Proposals Due Phase
 Install Phases Priority
 Payments Due Done Items
 Project Purchasing Hidden Items

Find All Project Tasks including CO's

Select

Pick	Entity	Client	Company	Title	Salesman
	1293.1-1.100	Rudy & Cecila Defiglia		President	Jim Engandela
	1293.1c1-1.100	Rudy & Cecila Defiglia		President	Jim Engandela
	1293.1c2-1.100	Rudy & Cecila Defiglia		President	Jim Engandela

-When Navigating from the Project/Tracker screen to the Master Tracker you will now return to this screen when you Leave the Master Tracker.

Project Tracker - Install Phase Milestones Project Sold Date: 5/12/2011 ?

Rudy & Cecila Defiglia

Done Find 
Master Tracker

Install Phases | Payments | Project Tasks

1293.1-1.100

Install Phase Milestones
New-3 Phase Pre-Trim-Final

Hide	Done	Done Date	Phase	Phase Date	Milestones	Owner
<input type="checkbox"/>	<input type="checkbox"/>		1	6/11/2011	Phase 1 - Prewire - Installation	Jim Engandela

Payments Purchasing Installations Invoicing

Sent Rcvd Ordered All Rcvd Scheduled Completed Sent Paid

Enhancement – Product Library: Product Detail: New Features & Layout

Sell Price Display:

The Sell Price of the product is now displayed at the top of the screen next to the Product Make and Model for quick viewing. Clicking on this price will pop up the Installed Product Price Display.

Supplement Indicators:

Each Tab on all Product Detail screens now shows a blue icon if that screen has Supplements (Labor, Parts, Wire and Tasks) assigned to the Product.

GP% added to Installed Price Display:

The Gross Profit Percentage of the Sell Price is now shown on the Installed Product Price Display.

Auto Clean Loading Calculator:

When you enter or leave a Product or click on the Update icon all Auto Calculator fields that are now appropriate for the settings you have chosen will be cleared. This includes clearing the Sell Price for Phantom Products.

Product Detail new screen layout:

The Options on the right side of the Product Library screen have been rearranged and colored for better comprehension.

Product Library - Product Detail

6 of 153

Linn
5101 Personal Handset
Universal learning remote
Audio : Multi-room : Keypad

153 Regular Products
154 Total including Hidden

Product Group: Audio : Multi-room : Keypad

Product Classification: Product

Primary Install Phase: 2 Trim

Favorite: A Fee SKU: Phantom Product:

Tax A: T Tax B: T

New Product: Discontinued Product:

Do not Hide: Hide this Product:

Do not Delete: Do not Discount:

Proposal Sort: m Issue Staple Up Card:

Purchasing Lead Days: 7 Cost Value: \$1,404.00

Optimum On-Hand Qty: 6 ReOrder Point: 2 \$468.00

Inventory Qty On-Hand: 11 \$2,574.00

Qty to Order:

Alt PO Vendor:

Unit: ea

Net Price: \$450.00 Loading Calculator:

Adjustment Type: %

Sell: \$390.00

Minimum Sell: \$375.00 37.6%

Raw Net Cost: \$234.00

Loaded Price

Sell: \$390.00

GP: 40.0%

Cost: \$234.00

Product & Supplements			Installed Price	
Product	Parts	Wire	Product	
\$390.00	\$1,085.00	\$1,249.50	Pts+Wi	\$2,334.50
\$610.00	\$50.00	\$185.00	Labor	\$845.00
\$1,000.00	\$1,135.00	\$1,434.50	Total	\$3,569.50

Enhancement – Product Library: Phantom Product - Installed Price Option

You can now show the Total Installed Price on your Phantom Products instead of only the Total Parts price (which a Phantom product is made up of). This Total Installed Price is used for display purposes only and shows on all Product Library List screens. You must check the Option in the Master Preferences/Other/Product 1 screen to show this price in the Product Library.

Product Library - Phantom Products - Sell Price Display Option

Display the Total Installed Price of a Phantom Product (including Parts, Wires and Labor), instead of the only the Total Parts, which is the Default Phantom Product Sell Price.

Find Products		Fav A B C		Recent		Product Library - Line List		AlphaFind: Make <input type="checkbox"/> Hidden <input type="checkbox"/>		Home																
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Show Products		Show Hidden		Detail List				Product Utilities		New Product		Leave														
Part Phantom		Inventory Control		Utility Lists				153 Items 154 Total		Phan Lab		Product Sets														
Bulk PreCut								Part Wire		Print Menu																
Show All Groups								Sell Price		Auto Tag																
Displin	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Notes	(Installed)	Fav	Hide													
Equip					EME	1111		Test Phantom Product			347.50 ea															
Audio	Speak	Center Channel			Klipsch	RC-35		Center Channel	Black		400.00 ea															

Enhancement – Product Library/Print Menu: Make Reports

New Manufacturer (Make) List report of all Product Makes in the Product Library.
 New Vendor Contacts with assigned Makes report.

Manufacturer (Make) List

Vendor Contacts with assigned Makes

Enhancement – Product Library: Show Recently Picked Products

Showing Products recently picked for Proposals and POS Quotes can speed up your Product selection. From the Main Product Library, Proposal Pick Products and POS Pick Products screens you can choose to show All Recently Picked products or those picked within the last 30 or 360 days. You can clear the Recently Picked Product History from the Product Utility screen as well.

Find Products		Fav A B C		Recent		Product Library - Line List		Pick Make <input type="checkbox"/> Show Hidden <input type="checkbox"/>		Home			
Show Products		Show Hidden		Detail List				Product Utilities		New Product		Leave	
Part Phantom		Inventory Control		Utility Lists				151 Items 153 Total		Phan Lab		Product Sets	
Bulk PreCut								Part Wire		Print Menu			
Show All Groups								Sell Price		Auto Tag			
Displin	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Notes	(Installed)	Fav	Hide
Audio	Speak	Center Channel			Kli				Black		399.00 ea		
Audio	Speak	Floor			Kli				Black		499.00 ea		
Audio	Speak	Bookshelf			Kli				Matte		450.00 ea		

Message

Choose Recently Picked Products during the last.....

Note: Clear "Recent history" from the Product Utility screen.

Clear Recently Picked Product History

Use this utility clear all Recently Picked Product History.

Enhancement – Product Library/Product Detail/Wire: Change Wire Qty

Home Run-Bulk Wire Qty is auto set by the building size calculator or manually changed in a Proposal.

Room Run-Bulk Wire Qty is set, in a Proposal, to the Master Prefs default Wire Qty or the Qty can be changed here by checking the RM Qty box, which enables you to override the default Qty.

The screenshot shows the 'Additional Wire & Cable' window with a table of wire items. A message dialog box is overlaid on the table, providing information about wire quantity settings.

Class	Bulk Run Type	No Lab	RM Qty	Default Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Price
Bulk	Room	<input type="checkbox"/>	<input type="checkbox"/>	20	M	Linn	K10 Cable	Loudspeaker cable	1	5.00	100.00
Bulk	Home	<input type="checkbox"/>	<input type="checkbox"/>	150		Monster	CAT5 Bulk	CAT5 Knekt cable	1	0.80	120.00
Bulk	Room	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8	ft				1	0.84	6.72
Pre-Cut		<input type="checkbox"/>	<input type="checkbox"/>	1	pr				3	120.00	120.00

Message

Home Run-Bulk Wire Qty is auto set by the building size calculator or manually changed in a Proposal.

Room Run-Bulk Wire Qty is set, in a Proposal, to the Master Prefs default Wire Qty or the Qty can be changed here by checking the RM Qty box, which enables you to override the default Qty.

OK

Enhancement – Product Library/Find Products: Find Discontinued Items

You can now Check the Discontinued Products box to find all of the Discontinued items in your Product Library.

The screenshot shows the 'Product Library - Find Products with more Criteria' window. A red arrow points to the 'Show Discontinued Product' checkbox in the search options list.

Product Library - Find Products with more Criteria

Enter your find criteria and then click the Done/Find button

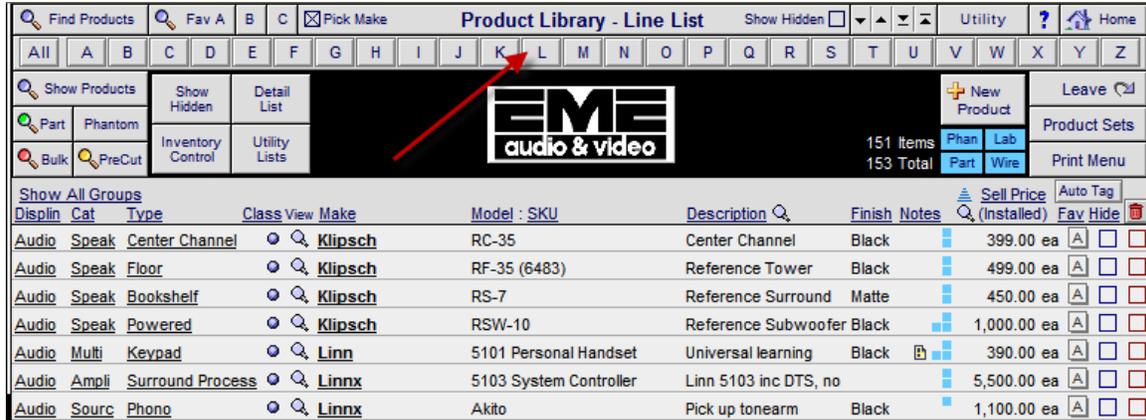
Done Find

- Show All Products
- Show New Products
- Show Hidden Products
- Show Omitted
- Show without Make or Model
- Show Discontinued Product

Enhancement – Product Library: Change Make Name Utility

You can now change Make names on products automatically using the Change Make Name Utility.

Click on the AlphaFinder to select the desired Make



Displn	Cat	Type	Class	View	Make	Model	SKU	Description	Finish	Notes	Sell Price	Auto Tag
Audio	Speak	Center Channel			Klipsch	RC-35		Center Channel	Black		399.00 ea	A
Audio	Speak	Floor			Klipsch	RF-35 (6483)		Reference Tower	Black		499.00 ea	A
Audio	Speak	Bookshelf			Klipsch	RS-7		Reference Surround	Matte		450.00 ea	A
Audio	Speak	Powered			Klipsch	RSW-10		Reference Subwoofer	Black		1,000.00 ea	A
Audio	Multi	Keypad			Linn	5101 Personal Handset		Universal learning	Black		390.00 ea	A
Audio	Ampli	Surround Process			Linnx	5103 System Controller		Linn 5103 inc DTS, no			5,500.00 ea	A
Audio	Sourc	Phono			Linnx	Akito		Pick up tonearm	Black		1,100.00 ea	A

Click on the Change Make Name Utility



Groom Make Utility

The Groom Make Utility will remove unwanted Makes from the list

Refresh the Pick Make List

Cancel

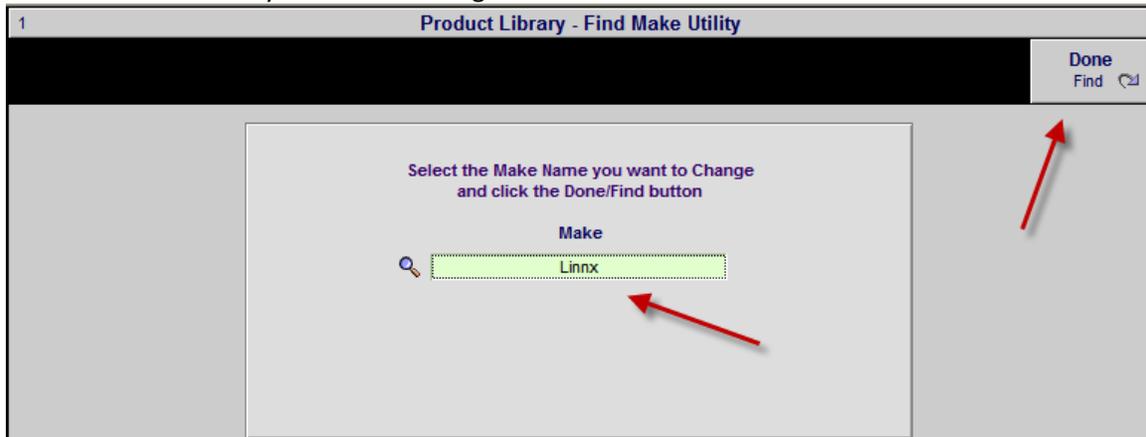
Click the Refresh button, if you see duplicate Makes or you do not see all Makes in the List

Pick Make

- Labor Saving Devices
- Leviton
- Linnx

When you add a new Make to the product library, the Make List will need to be Refreshed

Enter the Make name you want to Change



Product Library - Find Make Utility

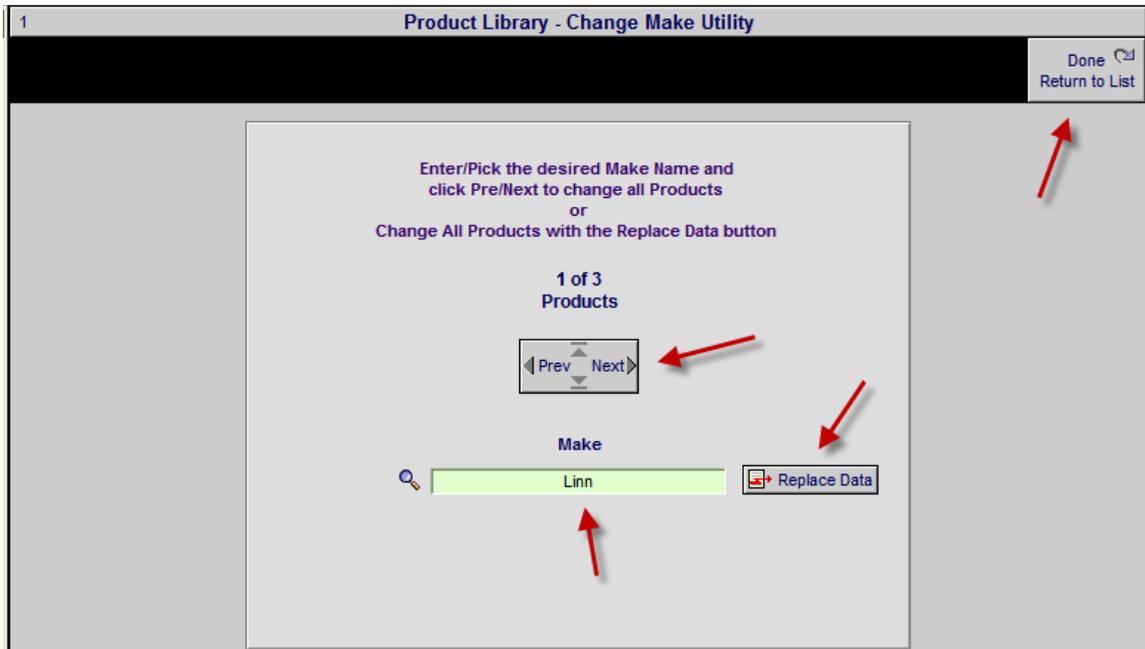
Done Find

Select the Make Name you want to Change and click the Done/Find button

Make

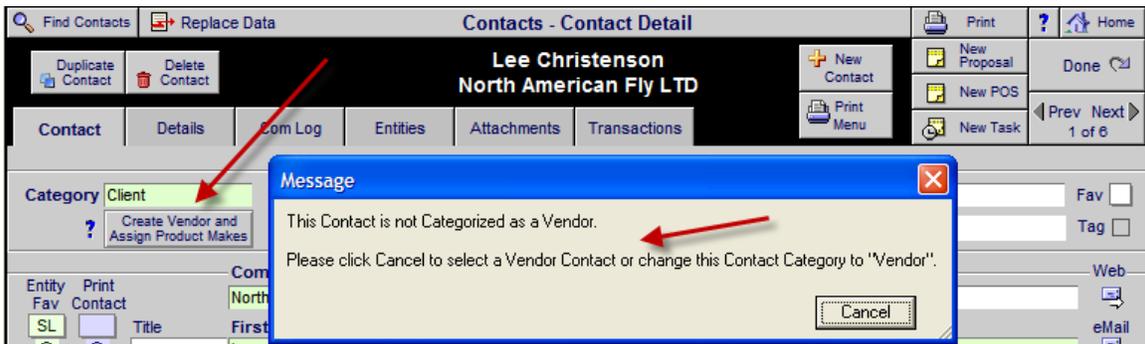
Linnx

Enter/Pick the correct Make Name and either move to the next product to change or Change All products with the Replace Data button.

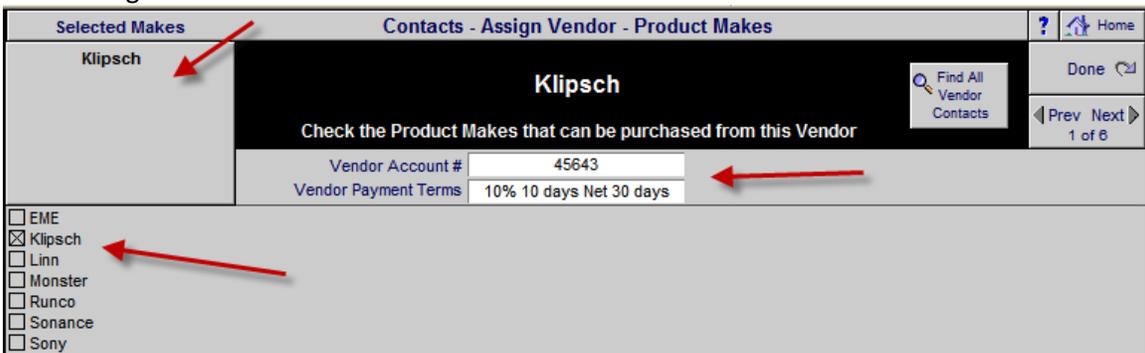


Enhancement – Contact Library: Vendor Contacts:

New Create Vendor and Assign Makes button, traps this utility if the Contact Category is not a Vendor.



Contacts –Assign Vendor – Product Makes screen is redesigned and includes a new display of Makes assigned to this Vendor.



Contact/Print Menu: New Vendor Contacts with assigned Makes report.

Fix – Entering Project SI, WO, PO screens: Faster and More accurate

The data processing routine that occurs when entering the Project Sales Invoice, Work Order and Purchase Order screens has been refined to greatly increase the speed required to enter these modules.

When entering Project SI, WO, PO modules all Products including Change Order products are flagged as Project items so that these modules work properly under all conditions.

Fix – Master Project/Payments: CO Payment Totals

Added CO Payment 2 and 3 fields to screen and printed report, so that CO subtotals add up to CO total.

Master Project - Payment Terms						
John & Mary Smith						Print ?
Home Entertainment System						Done
1284.1-1.100						View All
Change Orders						
Payment Terms						
Payment Method Percentage	Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback	Totals
Payment Description	Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.	
Original Project						
Project Pymt Amts	\$7,055.98	\$21,167.93	\$14,111.96	\$21,167.93	\$7,055.98	\$70,559.78
Pymt Date Due						
Add Payment Invoice	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Total Pymt Amt
Date Invoiced	9/12/2006	9/12/2006	4/28/2011			
1 Payment Amt Made	\$7,055.98	\$15,000.00	\$444.00			\$22,499.98
Pymt Made Dates	9/15/2006	9/23/2006				
Pymt Notes	ck 556	ck				
2 Payment Amt Made						
Pymt Made Dates						
Pymt Notes						
3 Payment Amt Made						
Pymt Made Dates						
Pymt Notes						
Balance Due	-\$0.00	\$6,167.93	\$13,667.96	\$21,167.93	\$7,055.98	\$48,059.80
All Change Orders						
CO Totals	\$0.00	\$10,025.84	\$7,519.38	\$7,519.38	\$0.00	\$25,064.59
- Payments Made						
Balance Due	\$0.00	\$10,025.84	\$7,519.38	\$7,519.38	\$0.00	\$25,064.59

Fix – Product Library/Product Detail: Make & Model Traps

All Products in your Product Library must have a Make & Model. If you create a new product and do not enter a Make & Model, you will be prevented from entering all Product Detail auxiliary and utility screens. You can, however, enter the main Product Detail screens (Specs, Pix, Supplements, etc) using the header Tabs.

Fix – Product Library/Inventory Control: Find Items on Specific Invoices

The Find POS Products function now works properly and finds all products that relate to specific POS Invoices.

Find Products	Fav A	B	C	<input checked="" type="checkbox"/> Pick Make	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	Part	Phantom	<input checked="" type="checkbox"/> Show All, Normal or Hidden Products		Manual Inventory 1. Enter Qty for desired item 2. Select a Project or POS number and click Post to Service or Display or New or 3. Click Post to enter without a Project/POS number										Automatic Inventory 1. Qty On Hand = Project PO Qty Received + Project Invoice Sold Qty 2. Take Physical Inventory by entering Adjust Qty on all items and then click on the Post All button		Done									
Bulk	PreCut	Items: 153	Total: 153	Unit Cost	<input type="checkbox"/> Show Only Items with Logs		Manual Inventory Projects Change Orders POS Invoices					<input type="checkbox"/> Find Items on Specific Invoices		Automatic Inventory Qty On Hand Inventory Totals												
Make Model	Hidden <	+ In Qty	- Out Qty	Phantom >	Post	Service Qty	Display Qty	New Qty	Edit	Adjust Qty	Inventory Totals															

Product Library - Find Inventory Items with Log Entries	
Enter find criteria and click a Find button	
<p>Find Projects & CO Products</p> <p>1. Select a Project or Finalized Change Order</p> <input type="text"/> <p>2. Click "Find Project Products"</p> <p>Find Project Products in...</p>	<p>Find POS Products</p> <p>1. Select a POS Sales Invoice, Change or Work Order</p> <input type="text" value="SI - Menkes, Peter & Alison SI #6991"/> <p>2. Click "Find POS Products"</p> <p>Find POS Products in... SI #6991</p>

Fix – Master Tracker/Tasks and Appointments User Default

When creating a Task or Appointment the Task Owner now defaults to the Current User who is logged into SCPS.

Task	
Task created for LeRoy Asher	
Task Owner	Sandy Engandela Default = Current User Priority 5
Created By	<input type="text"/>
Task Name	New Task
Task Description	<input type="text"/>
Task Date	May 18, 2011 <input type="checkbox"/> Carry Forward After Due
<input type="checkbox"/> Repeat Task	
Cancel Delete...	<input type="checkbox"/> Completed Another New Task Done

Fix – Upgrade Routine: Retain Master Preference settings

When upgrading SCPS your previous Product Listing and Product Sell Price settings are retaining and not reset to their defaults. Also if the Options Price is empty the default was to show the Sell Price and now there is an option to select the Sell Price.

Printer Setup **Master Prefs - Proposal Print Options** ? Home

hp LaserJet 1320 PCL 6, winspool,Ne03: Done

Product : Ext Sell

Areas & Products Report - Format

Yes No Page Break after each Area

Products - Do not Sort products by Discipline

Products - Show Product Install Location

Text - Hide Area Text

Text - Show only Area Text - No Products

Product Listing

Make : Model : SKU : Description : Finish

Product Features Text

Show All Areas & Products Report

None Product Summary Report (recommended)

Product Pictures

Show All Areas & Products Report

None Product Summary Report (recommended)

Contract

5 Subtotals

5 Subtotals = All 5 Subtotals separate

3 Subtotals = 1 (Products), 2 (Parts + Wire), 3 (Labor + Fees)

2 Subtotals = 1 (Products + Parts + Wire), 2 (Labor + Fees)

1 Subtotal = Combines all into 1 Subtotal

Price Guarantee

Do not show Contract Price Section

Do Not Show Date

Areas & Products Report - Pricing

Show Line Item Prices

Product : Ext Sell

Product/Parts/Wire : Ext Sell

Product + Product Labor : Ext Sell

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

Product : Ext List

Hide Sell Price

Area Totals Show Area Totals Hide Area Totals

Show "Option Prices" in Product Description

Show Sell Price

Do Not Show Option prices

Show as selected Print Option prices

Show Prices regardless of Print Option setting

Show as Installed Products & Supplements

Fix – Proposal & Project/Phantom Products Parts totals

When picking a Phantom Product into a Proposal the Parts prices were showing and they should be transferred to the Product Price (a phantom product's price is made up of the sum of its parts). This was doubling the parts price on the Phantom Product. This has been fixed.

Fix – Proposal/Product Detail/Wire Supplements: Changing Product Qty

When a Proposal is set to Itemize Wires, then a separate PreCut wire record is created with a qty of 1 for each PreCut Wire. When you increase or decrease the Product Qty, these wire records need to be duplicated or deleted accordingly. This function now works properly.

Delete Product Client Mode **Proposal - Product Detail** 1 of 1 ? Home

Mr. & Mrs. Christenson North American Fly LTD
1289.1-1.100

Linn : 5101 Personal Handset
Audio : Multi-room : Keypad

Proposal Detail

Prev Next

Product Specs Pix - PDF's Labor Parts Wire Tasks **Breakfast Room**

Qty

Make Linn Sell Price \$390.00 ea

Model 5101 Personal Handset

SKU

Finish Black

Description Universal learning remote

Features Programmable, high-power, long range, infra-red remote control for hand held or table top operation

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

Group Audio : Multi-room : Keypad

Change Group Original Audio

Product Classification Product

Primary Install Phase 2 Trim

Tax A T + Tax B T

Do not Discount Product Sort m

Show Product as Option Discontinued

Staple Card

Purchasing Lead Days 7

Vendor Linn Products

Linn : 5101 Personal Handset : Universal learning remote : Black

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

Mr. & Mrs. Christenson North American Fly LTD
1289.1-1.100

Linn : 5101 Personal Handset
Audio : Multi-room : Keypad

Proposal Detail

Prev Next

Product Specs Pix - PDF's Labor Parts Wire Tasks **Breakfast Room**

Wire Make Model **Wire & Cable**

Product Qty 2 *Only products classified as "Wire" can be added Wire & Cable are Itemized*

Class	Bulk Run	No Labor	Total Qty	Wire Make	Model	Description	Phase	Unit Cost	Unit Sell	Ext Sell	
Bulk	Home		150 M	Linn	K10 Cable	Loudspeaker cable	1	3.00	5.00	750.00	<input type="checkbox"/>
Bulk	Home		150 M	Linn	K10 Cable	Loudspeaker cable	1	3.00	5.00	750.00	<input type="checkbox"/>
Bulk	Home		150 ft	Monster	16/2 Spkr Wire	2 Conductor Speaker	1	0.15	0.45	67.50	<input type="checkbox"/>
Bulk	Home		150 ft	Monster	16/2 Spkr Wire	2 Conductor Speaker	1	0.15	0.45	67.50	<input type="checkbox"/>
Bulk	Room		75 ft	Monster	MVQUAD-B DB EZ500	RG6 Direct Burial	1	0.60	1.80	135.00	<input type="checkbox"/>
Bulk	Room		75 ft	Monster	MVQUAD-B DB EZ500	RG6 Direct Burial	1	0.60	1.80	135.00	<input type="checkbox"/>
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00	<input type="checkbox"/>
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00	<input type="checkbox"/>
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00	<input type="checkbox"/>
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00	<input type="checkbox"/>
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	3	72.00	120.00	120.00	<input type="checkbox"/>

SCPS Version 8.0v2
Released: 4/1/2011

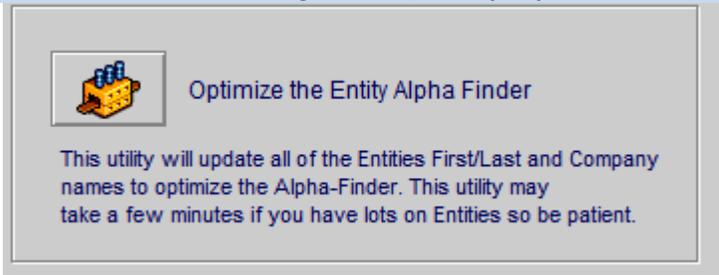
Fix – Proposal/RCMS Client Info: Email Address field entry

For RCMS Bookkeeping software users only:
 The email contact field has been changed to allow email address entry.

Enhancement – Speed entering Proposals/Projects/Completed/Archives

The setting of First Name/Last Name and Company name for only those Entities that are blank instead of all Entities greatly speeds up entering the Entity Lists and still retains the integrity of the Alpha-Finder search mechanism.

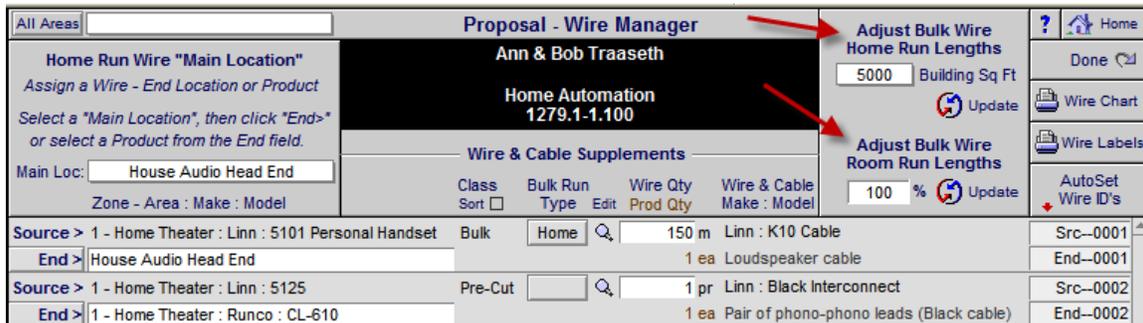
Enhancement – Main Logo Screen/Utility: Optimize the Entity AlphaFinder



SCPS Version 8.0v1
Released: 3/28/2011

Enhancement – Proposal/Supplements/Wire Manager: Adjust Bulk Wire

You can now change the Building Size and the Bulk Wire Home Run and Room Run lengths for all Bulk Wire Supplements from the Proposal/Wire Supplements/Wire Manager screen.



Source >	End >	Class	Bulk Run Type	Wire Qty	Wire & Cable Make : Model	Wire ID
1 - Home Theater : Linn : 5101 Personal Handset	House Audio Head End	Bulk	Home	150 m	Linn : K10 Cable	Src-0001
				1 ea	Loudspeaker cable	End-0001
1 - Home Theater : Linn : 5125		Pre-Cut		1 pr	Linn : Black Interconnect	Src-0002
1 - Home Theater : Runco : CL-610				1 ea	Pair of phono-phono leads (Black cable)	End-0002

Enhancement – Proposal/Product Detail/Labor Supplements: GUI

The Labor Supplements Detail screen has been fine tuned for easier viewing of all Labor time, rate and degree of difficulty numbers.

Alt Labor View		Primary Phase: 2 Trim		Proposal - Product Detail - Labor Supplements				1 of 1		Home	
Areas		Text		Products		Hayes Callahan 1294.1-1.100				Labor Sub Cats	
Labor		Parts		Wire		Tasks		Linn : 5101 Personal Handset Audio : Multi-room : Keypad			
Product		Specs		Pix - PDF's		Labor		Parts		Wire	
										Atrium	
Add Labor Supplement		Total Labor for All Phases (1+2+3) Extended Qty = 2 ea						Refresh		up dn	
Labor Type	Labor		Delete Labor	Time		Sell		Cost			
	Sell	Cost		Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD		
1 - Installation	\$80.00	\$40.00		13:12:00	6:36:00	\$1,056.00	\$528.00	\$528.00	\$264.00		
4 - Parts Labor	\$60.00	\$30.00		2:12:00	1:06:00	\$132.00	\$66.00	\$66.00	\$33.00		
5 - Wire Labor - Bulk	\$70.00	\$35.00		6:52:30	3:26:15	\$481.25	\$240.63	\$240.63	\$120.31		
6 - Wire Labor - Precut	\$80.00	\$40.00		0:33:00	0:16:30	\$44.00	\$22.00	\$22.00	\$11.00		
Phase 1+2+3 Total Labor:				22:49:30	11:24:45	\$1,713.25	\$856.63	\$856.63	\$428.31		
Phase 1 Prewire Extended Qty = 2 ea											
Labor Type	Labor		Unit Time	Time		Sell		Cost			
	Sell	Cost		Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD		
1 - Installation	\$80.00	\$40.00	1:00:00	2:12:00	1:06:00	\$176.00	\$88.00	\$88.00	\$44.00		
4 - Parts Labor	\$60.00	\$30.00	0:00:00	0:00:00	0:00:00						
5 - Wire Labor - Bulk	\$70.00	\$35.00	3:07:30	6:52:30	3:26:15	\$481.25	\$240.63	\$240.63	\$120.31		
6 - Wire Labor - Precut	\$80.00	\$40.00	0:00:00	0:00:00	0:00:00						
Phase 1 Prewire Totals:				4:07:30	9:04:30	\$657.25	\$328.63	\$328.63	\$164.31		

Enhancement – Proposal Overviews: Redesign and Improve

Proposal Overviews are important to effectively communicating with your clients about the benefits of your company, your services and the products you sell.

Master Overviews are stored in your Master Preferences/Proposal/Overview screen. When you create a new Proposal the Overviews that you selected as Default Overviews are automatically added to the Proposal.

You can also Add additional Master Overviews to the Proposal as well as Edit any Master Overview specifically for that Proposal. Once you Edit an Overview it can be saved to your Master Overviews, for future use, and the Proposal number is stamped in the Master Preferences Entity field for future reference.

You can also create New Overviews from within a Proposal, specifically for that Proposal, and these can also be added to your Master Overview list for future use if you wish.

Deleting a Master Overview now removes it from the Master Overview list, but retains the Overview in all of the Proposals that it was used in.

The entire Overviews mechanism has been re-engineered to be more efficient and eliminate redundant records. When you upgrade to SCPS 8.0 your current Overviews will be automatically groomed to accommodate this new mechanism.

Master Prefs - Proposal Prefs - Overviews Print ? Home

Cover Page	Text & Fees	Contracts	Proposal Print Options	Done
Client Intro	Overviews	Terms		
Shop Intro	Extra Pages	Pricing		

Master Overviews Added to Master OV's from this Entity

Auto Add to New Proposals	Default	Edit	Overview Title	Overview Text	Sort	Remove
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Elan HD System	The ELAN HD whole house system will	b	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	For more than 30 years, Crestron has been	m	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Linn Products	Linn Products Limited is an independent	1292.1-1.100 m	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Monster Cable - Wire it Right...From The	Whether you're wiring a single-room A/V	m	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New Test Overview	New Test Overview Added to Master OV	1292.1-1.100 m	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Panasonic Phone/Intercom Systems	Today many homeowners are having	m	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	THX Home Program	Home THX Audio Systems, developed by	m	

Proposal - Overviews ? Home

Ann & Bob Traaseth Done

Home Automation
1279.1-1.100

Master Overviews

Add to Proposal	Sort	Overview Title
<input type="checkbox"/>	b	Elan HD System
<input type="checkbox"/>	m	Crestron
<input type="checkbox"/>	m	Linn Products
<input type="checkbox"/>	m	Monster Cable - Wire it Right...From The
<input type="checkbox"/>	m	New Test Overview
<input type="checkbox"/>	m	Panasonic Phone/Intercom Systems
<input type="checkbox"/>	m	THX Home Program

Overviews for this Proposal

New Overview for this Proposal	Remove from Proposal		
View	Sort	Overview Title	Remove from Proposal
	a	Linn Products	
	m	Panasonic Phone/Intercom Systems	
	m	THX Home Program	

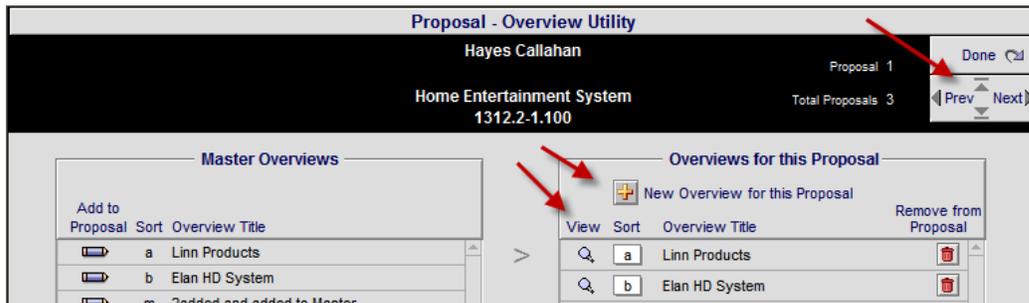
Proposal Overview Edit Overview Done

THX Home Program

Home THX Audio Systems, developed by THX Ltd., have become the world's standard for film enjoyment in the home. Now in its 15th year, THX licenses its patented technology to leading A/V and PC manufacturers worldwide. The legendary training program has certified more than 1300 dealers as among the highest qualified to sell and install Home THX products. THX also certifies home video software through the THX Digital Mastering Program, ensuring that DVD software, laser discs and VHS videotapes provide the best image and sound quality possible through the use of patented THX technology and our unique quality control expertise.

Enhancement – Main Logo Screen/Utility: Overview Grooming Utility

This Utility enables you to groom your Proposals and Pending Change Orders that have Overviews assigned to them. You can cycle through them using the Previous/Next buttons and Add, Edit or Delete these Overviews. **It is recommended that you run this utility and delete any duplicate Overviews after upgrading to the new 8.0 version of SCPS.**



Enhancement – Proposal/Project: Add Labor Categories and Hourly Rates

The selected Labor Categories and Hourly Rates for this Proposal are now displayed on the Project screen.

Reset Project to Master Prefs Print ?

Proposal - Project

Mike & Jessica Potter Done

Client: Home Entertainment System
Project: 1292.1-1.100

Info | Contacts | Com Log

Proposal-Project Title

Home Entertainment System

Installation & Payment Type Update

New-3 Phase Pre-Trim-Final

Hourly Labor Rates

	Labor Category	Cost	Sell
<input type="radio"/> 1	Basic Rate	Installation	40.00 80.00
<input checked="" type="radio"/> 2	Inner City Rate	Programming	50.00 100.00
<input type="radio"/> 3	Prewire only	Training	60.00 120.00
<input type="radio"/> 4		Parts Labor	30.00 60.00
<input type="radio"/> 5		Wire Labor - Bulk	35.00 70.00
		Wire Labor - Precut	35.00 70.00

Installation Phases Update

1 - Prewire

2 - Trim

3 - Final

Target Project Completion Date.....

Enhancement – Proposal/Project/Labor Supplement/Labor Phase: Labor

The selected Labor Categories and Hourly Rates for this Proposal or Project are now displayed on the Labor Supplement/Labor by Phase screen.

Proposal - Labor by Phase						
Mike & Jessica Potter						
Home Entertainment System 1292.1-1.100						
Installation Type New-3 Phase Pre-Trim-Final						
Hourly Labor Rates						
Labor Category	Cost	Sell	Degree of Difficulty			
Installation	30.00	60.00	1 - Prewire	10%		
Programming	40.00	80.00	2 - Trim	10%		
Training	50.00	100.00	3 - Final	10%		
Parts Labor	30.00	50.00	Parts Unit Time		0:15	
Wire Labor - Bulk	35.00	60.00	Bulk Wire Unit Time		0:00	
Wire Labor - Precut	40.00	60.00	Pre Cut Wire Unit Time		0:05	
Labor Time by Phase (hrs:min:sec)						
Labor Category	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total		
1 - Installation						
2 - Programming						
3 - Training		5:00:00		5:00:00		
4 - Parts Labor		0:30:00	0:30:00	1:00:00		
5 - Wire Labor - Bulk	3:07:30			3:07:30		
6 - Wire Labor - Precut	0:15:00			0:15:00		
Total (hrs:min:sec)	3:22:30	5:30:00	0:30:00	9:22:30		
Labor Amount by Phase						
Labor Category	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total	GP%	
1 - Installation						
2 - Programming						
3 - Training		\$600.00		\$600.00	50.0%	
4 - Parts Labor		\$30.00	\$30.00	\$60.00	50.0%	
5 - Wire Labor - Bulk	\$218.75			\$218.75	50.0%	
6 - Wire Labor - Precut	\$17.50			\$17.50	50.0%	
Total Amount	236.25	630.00	30.00	\$896.25	50.0%	

Enhancement – Proposal/Project/Product Summary: Sort and Report

The Product Summary screen now sorts by Make & Model when viewing by Sum and by Zone Area when viewing by All. The Printed Report also reflects this change.

Super View				Sum View	Show All	Proposal - Product Sum View					
John & Mary Smith				1284.1-1.100				Done			
Areas	Text	Products									
Labor	Parts	Wire	Tasks								
Zone - Area	Qty	Make : Model		Description							
	1 ea	Klipsch : RC-35		Center Channel Speaker							
	2 ea	Klipsch : RF-35		Reference Tower Speaker							
	2 ea	Klipsch : RS-7		Reference Surround Speaker							
	1 ea	Klipsch : RSW-10		Reference Subwoofer							
	1 ea	Linn : 5101 Personal Handset		Universal learning remote							
	1 ea	Linn : 5125		Five channel power amplifier (Black)							
	2 ea	Linn : Classik Movie Di		Integrated multi-channel DVD-CD							
	1 ea	Linn : Classik Movie Di-B		Integrated multi-channel DVD-CD							
	1 ea	Linn : Classik Music-S		Integrated CD player/tuner/preamp/power							
	2 ea	Linn : Classik Speaker Package		Complete 5 speaker surround system with							

Enhancement – Proposal & Project/Wire Manager: GUI & Navigation

Improved GUI for easier usage for both Proposal and Project Wire Manager screens.

Featuring improved navigation when entering and leaving the Wire Manager. The Wire Manager can be accessed from the Wire Supplements, Project Work Order and Shop Print Menu screens and return to those screens.

Improved Printing of Wire Labels ensuring that duplicate labels are not created.

All Areas		Proposal - Wire Manager				Adjust Bulk Wire Home Run Lengths		Home	
Home Run Wire "Main Location"		Ann & Bob Traaseth				5000 Building Sq Ft		Done	
Assign a Wire - End Location or Product		Home Automation 1279.1-1.100				Update		Wire Chart	
Select a "Main Location", then click "End>" or select a Product from the End field.		Wire & Cable Supplements				Adjust Bulk Wire Room Run Lengths		Wire Labels	
Main Loc: House Audio Head End		Class Bulk Run Wire Qty Wire & Cable				100 % Update		AutoSet Wire ID's	
Zone - Area : Make : Model		Sort Type Edit Prod Qty Make : Model							
Source >	1 - Home Theater : Linn : 5101 Personal Handset	Bulk	Home	150 m	Linn : K10 Cable			Src-0001	
End >	House Audio Head End			1 ea	Loudspeaker cable			End-0001	
Source >	1 - Home Theater : Linn : 5125	Pre-Cut		1 pr	Linn : Black Interconnect			Src-0002	
End >	1 - Home Theater : Runco : CL-610			1 ea	Pair of phono-phono leads (Black cable)			End-0002	

Enhancement – Proposal/Pricing/Product Tax: Add Labor Tax Flags

You can now change the Tax Flags for Product Labor to T = Tax or E = Tax Exempt. You can also Auto Set these Tax Flags for all of the Products in this Proposal just like you can for the Product Tax Flags. It is necessary to click on the Refresh Screen button after changing the Flag to update the Tax Amount.

You can also use the Auto Set Labor Tax Flags utility to change all of the Labor Tax Flags in this Proposal, just like you can with the Auto Set Product Tax Flag utility.

Auto Set Product Tax Flags		Auto Set Labor Tax Flags		Proposal - Product Tax				Refresh Screen		Print		Home	
				Mike & Jessica Potter						Done			
Pricing		Labor Rates		Commissions		Security System 1282.1-1.100				Change Supplement Taxes from the Supplement Screens			
Tax Summary		Product Tax		Fees Tax									
Zone-area	Make Model	Product Tax Flag	Product Tax	Labor Tax Flag	Labor Tax	Parts Tax	Bulk Wire Tax	Precut Wire Tax	Total Tax				
Basement	Linn	Tax A: T	119.00	T	3.20			14.40	125.60				
	5125	Tax B: T	13.75	E				1.80	15.95				
	Total:		123.75		3.20			16.20	141.55				
Basement	Linn	Tax A: T	199.00	T	11.50		41.10		243.70				
	Katan	Tax B: T	24.88	E			5.14		31.45				
	Total:		223.88		11.50		46.24		275.15				
Basement	Linn	Tax A: T	198.00	E		3.80	12.75		217.75				
	Melodik	Tax B: T	24.75	E		0.48	1.59		27.47				
	Total:		222.75			4.28	14.34		245.22				
Basement	Runco	Tax A: T	319.00	T	4.40			4.00	323.80				
	CL-610	Tax B: T	39.98	T	0.55			0.50	41.02				
	Total:		359.78		4.95			4.50	364.82				

Enhancement – Project/Payments: Reset Project Payments

Users with Access Rights can now Reset a Project's payment amounts with this Utility from the Project/Payment screen.

Master Project - Payment Terms - Reset Utility						
Mike & Jessica Potter						Done
Installation Type New-3 Phase Pre-Trim-Final			Home Theater System 1285.1-1.100			
Payment Terms						
Payment Method Percentage	Deposit Deposit	Step 1 Payment Payment 1	Step 2 Payment Payment 2	Step 3 Payment Payment 3	Holdback Hold Back	Original Project Grand Total (Pricing screen)
Payment Step Director Step 1 Step 2 Step 3 1 2 3	Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation prewire phase.	Due at the completion of the installation.	\$30,646.68
Original Project						Grand Totals
Project Pymt Amts	\$3,064.67	\$9,194.00	\$6,129.34	\$9,194.00	\$3,064.67	\$30,646.68
All Change Orders						
CO Totals	\$0.00	\$6,924.15			\$0.00	\$6,924.15
Master Project Includes Original Project & All CO's						
Master Proj Totals	\$3,064.67	\$16,118.15	\$6,129.34	\$9,194.00	\$3,064.67	\$37,570.83
Reset Original Project Payments Utility						
<p>This Utility will reset the Original Project Payments to the Master Preference Payment settings. It will not affect the Final Change Order Payments.</p> <p>This Utility will change the Project Payments which a client may have already seen ... so use it with discretion. Since this Utility uses the Master Preference Payment settings you should first make sure that they are set properly. The changes this Utility makes cannot be reversed. It is recommended that you make a backup of the SCPS files before Updating.</p>						
Installation & Payment Type						
New-3 Phase Pre-Trim-Final						
Master Preferences Payment %	10 %	30 %	20 %	30 %	10 %	
Original Project Payment %	10 %	30 %	20 %	30 %	10 %	
Problem Indicator:			Reset Payments			

Enhancement – POS/Sales Invoice and Quotations: Hide Labor Matrix

You can choose to Hide the Labor Detail Matrix at the bottom of printed POS Quotations and Sales Invoices. Click on the Settings button at the top of the Quotation or Sales Invoice screen and set the flag to Don't Show.

Estimated Services	Hours	Rate	Amount
Equipment Installation:	0:30:00	80.00	40.00
Total Labor:	0:30:00 Hrs		40.00

Enhancement – POS/ServiceRepair Invoice: New Features

The Service Repair invoice has been redesigned to include a list of all associated RMA's (Return Authorization forms), a Master Tracker appointment scheduler and a Tracking Log to keep track

of all actions involved in this repair. The printed Invoice has also been modified to accommodate this new layout.

POS - Service Order

SO #6351

3/11/2005

Label JOB SITE: Show Hide

Dan Black
Black/Gideon
20 Elm Avenue
Toronto, ON M4W 1N5

Dan Black
Black/Gideon
20 Elm Avenue
Den Bosch & Finchley
Toronto, ON M5R 1J2

Master Tracker Appointment
Requested Installer: _____
Add Edit
Appointment: 2/9/2011 7:00 AM

Salesman: Dave Dowling Contractor: _____ Contractor Ph: _____
Project Manager: _____ Contact Super: _____ Super Phone: _____
Site Survey By: _____ Contact Special: _____ Special Phone: _____
Estimate By: _____ Techs/Subs: _____

Make Yamaha Warranty: Yes No Warranty: _____
Model RX 300 Reciever Accessories: Remote control
Serial Number 794409509354
Description of Problem: VKP in master area bathroom not working at all, may need to disconnect briefly and re-connect. Take down current Vantage file just incase.
Another keypad faceplate supposidly fell off the wall and broke? take a replacement.

Date Scheduled: 2/10/2011 Time Scheduled: _____
1 Visit Date: _____ Hours: _____ Tech: _____ Notes: _____
2 Visit Date: _____ Hours: _____ Tech: _____ Notes: _____
3 Visit Date: _____ Hours: _____ Tech: _____ Notes: _____
4 Visit Date: _____ Hours: _____ Tech: _____ Notes: _____
Site Directions: Rt 21, 6 miles south, turn left

Date Completed: 2/17/2011 Mileage: _____ Travel Time: _____

Date	Specialist	Activity Log Description
2/10/2011	Dave Dowling	Took product in
2/18/2011	Joel Roberts	Send to factory

Work Performed: Replaced FM tuner

Labor & Parts Used: Tuner 874837
Labor 6 hours

Additional Work Requested: Please install this product

Requested By: _____ Customer Signature: _____
Time Service Began: _____ Time Service Finished: _____ Return Required Date: _____
Service Manager: _____ Managers Signature: _____
Return Call & Tech Notes: _____
Site Visit Done: Yes No

Enhancement – Product Library/Inventory Control: New features

Many new features have been added to the Manual Inventory control module.

1. You can Post to New or Display Qty without adding a Project or POS number.
2. Or you can Post qty to Service, Display and New item qty with a Project or POS number.
3. Client Last names have been added to the Project and POS pop lists and these lists are sorted by the Last Name.
4. You can enter the qty into an In and Out field for adding or subtracting.
5. The screen GUI has been refined for better comprehension.
6. Adding Manual inventory Quantities adds to the Qty on Hand in the Automatic Inventory section, so that your Inventory Totals are adjusted.

Product Library - Inventory Control											
Manual Inventory											
Automatic Inventory											
Items: 3 Total: 153		Unit Cost	+ In Qty	Projects	POS	Service	Display	New	Qty On Hand	Inventory	
Make Model		Hidden < Phantom >	- Out Qty	Change Orders	Invoices	Post	Qty	Qty	Adjust Qty	Totals	
<input checked="" type="radio"/> Linn		153.00				Post	1		6 ea	918.00	
Aktiv Modules											
<input type="radio"/> Linn		1,770.00				Post	1		6 ea	10,620.00	
Akiva											
<input type="radio"/> Linn		150.00				Post		2	7 ea	1,050.00	
Basik 3 IR											

Enhancement – Product Library/Inventory Control: Show Invoice Log Items

The “Show Only Items with Logs” button will display only those Products that have entities in the log.

The "Find Items on Specific Invoices" button takes you to the Find Inventory Items with Log Entries screen, where you can enter a Project or POS Invoice and Find all of the Products associated with that specific Invoice.

A "View Log" icon has been added to each item record to view the Invoice Log list for each item.

The Print Menu button will print the Products showing on this screen, so you can chose what you want to print and then click on the Print button.

Items: 3 Total: 153	Unit Cost Hidden < Phantom >	In Qty + Out Qty	Projects Change Orders	POS Invoices	Post	Service Qty	Display Qty	New Qty	Edit	Qty On Hand Adjust Qty	Inventory Totals
Linn	153.00				Post		1			6 ea	918.00
Aktiv Modules											
Linn	1,770.00				Post			1		6 ea	10,620.00
Akiva											
Linn	150.00				Post			2		7 ea	1,050.00
Basik 3 IR											

Find Projects & CO Products

1. Select a Project or Finalized Change Order

Smith, John & Mary #1284.1-1.100

- #1286.1-1.100
- Potter, Mike & Jessica #1285.1-1.100
- Potter, Mike & Jessica #1285.1c1-1.100
- Smith, John & Mary #1284.1-1.100
- Smith, John & Mary #1284.1c1-1.100
- Smith, John & Mary #1284.1c2-1.100
- Smith, John & Mary #1284.1c3-1.100

2. Click "Find Project Products"

Find Project Products in...
1284.1-1.100

Find POS Products

1. Select a POS Sales Invoice, Change or Work Order

2. Click "Find POS Products"

Find POS Products in...

Enhancement – Product Library/Inventory Control/Report: Add Grand Total

The Grand Totals have been added to the end of the Inventory Control report.

2/8/2011 Page: 15

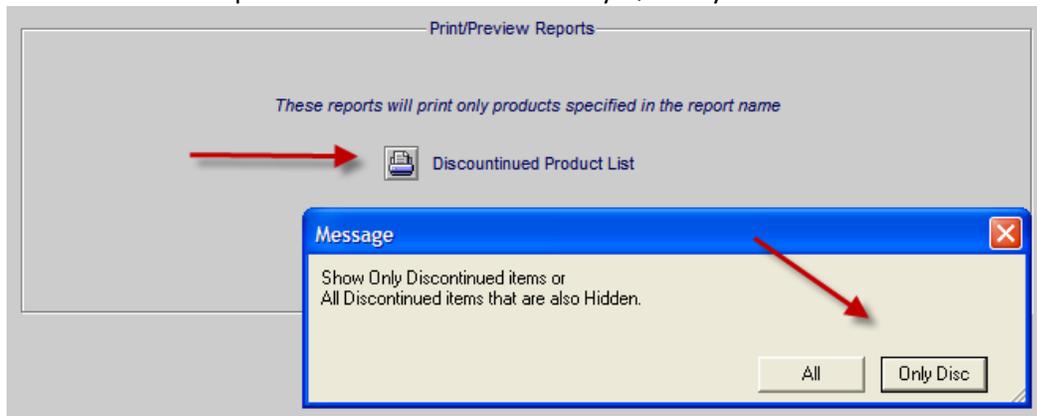
Inventory Report

153 of 151 Items by Manufacturer

Make	Phantom Hidden	Invoice Log	New Qty Display Qty Service Qty	Qty On Hand \$ Value
<u>Sony</u>	<input type="checkbox"/> <input type="checkbox"/>		-1	-1 ea -\$620.40
DVP-NS999ES	Black			
Progressive Scan DVD Player				
<u>Sony</u>	<input type="checkbox"/> <input type="checkbox"/>			0 ea
KDE-50XS955	Silver			
50" Plasma Television				
<u>Sony</u>	<input type="checkbox"/> <input type="checkbox"/>			4 ea \$1,600.00
KV-27FS13				
27 FD Trinitron® WEGA® TV				
<u>Sony</u>	<input type="checkbox"/> <input type="checkbox"/>	1 CO #4163 11/17/2010 1 SI #6990 11/22/2010		6 ea \$768.00
SLV-N99				
VHS Video Cassette Recorder				
Sony Total:				\$1,747.60
Inventory Grand Totals				
Optimum Level	Service	Display	New	Inventory on Hand
\$1,695,942.60	\$3,300.00	\$3,300.00	-\$12,563.40	\$1,421,735.90

Enhancement – Product Library/Print Menu/Print Discontinued items

You can now choose to show the Discontinued items with or without Discontinued Items that are also Hidden. The report now includes the Inventory Quantity on Hand and the item Cost.



2/24/2011 Page: 1

Product List

Make	Model Qty on Hand	Discontinued Hidden	Discipline Description	Category Type	Sell Cost
Linn	Akito 8	<input checked="" type="checkbox"/>	Audio Sourc Pick up tonearm	Phono Black	1,100.00 ea 680.00
Linn	Black Interconnect 5	<input checked="" type="checkbox"/>	Wire Pair of phono-phono leads (Black	Pre-C Interconnect Black	120.00 pr 72.00

Enhancement – Product Library/Detail screen: Improve GUI

All Product Library Detail screens have been graphically improved with better shading.

Product Library - Labor Override

1 of 151

Home

Linn
5101 Personal Handset
 Universal learning remote
 Audio : Multi-room : Keypad

Done
 Return to List
 Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

Override Labor

Audio : Multi-room : Keypad

Classification: Product
 Primary Install Phase: 2 Trim

Labor Categories	Hourly Labor Rate	Override Labor Time (hrs:min:sec)			Reset All Labor to Group Labor
		Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	
1 - Installation	\$60.00	0:00:00	0:30:00	0:00:00	DOD = 1 Apply DOD 2 Avg 10% Apply DOD 3 Avg 50%
2 - Programming	\$80.00	0:00:00	0:00:00	1:00:00	
3 - Training	\$100.00	0:00:00	5:00:00	0:00:00	
Total Labor Time		0:00:00	5:30:00	1:00:00	= 6:30:00 Total Hrs
Total Labor Amount		\$0.00	\$530.00	\$80.00	= \$610.00 Total

Enhancement – Contact/Detail: Change Contacts with Entities warning

If you attempt to change the Entity Fav name on a Contact that has Proposal/Project or POS Entities attached to it you will get this Warning message. You can override it if you wish by clicking on the YES button or REVERT it back to the previous setting. If you click YES all of the Names on the Proposals/Projects and POS that are attached to this Contact will change.

Find Contacts Replace Data

Contacts - Contact Detail

Duplicate Contact Delete Contact

Rudy & Cecila Defiglia

Contact Details Com Log Entities Attachments Transactions

Category Client Class Key ID Labels
 Group Status Staff SE

Company Vendor # We

Entity Fav	Contact Merge	Title	First Name	Last Name	Job Title	eM
<input checked="" type="radio"/>	<input type="checkbox"/>		Rudy	Defiglia		
<input type="radio"/>	<input type="checkbox"/>	Mr.	Rudy & Cecila	Defiglia		

FileMaker Pro

! This Fav Contact Name has Proposals/Projects or POS Entities, and should not be changed. If you click YES all of these Entities will be changed. Better to click REVERT and Duplicate this Contact if you wish.

Revert Field Yes No Do Not Show Fav

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

When you change any of the Labor Categories or Labor Rates on this screen the Labor on all of your Products in the Product Library need to be updated. This utility has now been incorporated into the Done button instead of manual onscreen buttons.

Master Prefs - Labor Rates									
Labor Categories	Default		Hourly Rates 1		Hourly Rates 2				
	Basic Rate		Inner City Rate						
	Sell	Cost	Sell	Cost					
1 - Installation	\$60	\$30	\$80	\$40					
2 - Programming	\$80	\$40	\$100	\$50					
3 - Training	\$100	\$50	\$120	\$60	\$25	\$15			
4 - Parts Labor	\$50	\$30	\$60	\$30	\$25	\$15			
5 - Wire Labor - Bulk	\$60	\$35	\$70	\$35	\$25	\$15			
6 - Wire Labor - Precut	\$60	\$40	\$70	\$35	\$25	\$15			

Message

If you have CHANGED any Labor Rates on this screen, you must click UPDATE to sync your Product Library Labor. It will not change existing Proposals & Projects.

Done Update

Enhancement – Master Preferences/Lists/Labor: Labor Time Pop Up Values

The SCPS upgrade is a 100% seamless process. To that end, all of the Labor Time Pop Up lists now get their values from the Master Preferences/Lists/Labor screen. This POP List is populated with the Default Labor Time Values which you can modify to suit your requirements. The actual POP up value lists, throughout SCPS, have an "Other" command at the bottom of them for making one time entries. If you want to modify these Pop Up lists, please do it in the Master Preferences/Lists/Labor screen and those changes will automatically be reflected in the POP Lists in throughout SCPS. This way when you upgrade SCPS your custom Labor Time List will automatically come forward. Please adhere to the required time format of hrs:min:sec.

Master Prefs - Value Lists - Labor			
Labor Time POP UP List	Labor Categories	Installation Labor Category 1	Programming Labor Category 2
Required Format hrs:min:sec 00:00:00	1 - Installation 2 - Programming 3 - Training		
0:00:00			
0:00:05			
0:00:10			
0:00:15			
0:00:20			
0:00:25			
0:00:30			
0:00:35			
0:00:40			
0:00:45			
0:00:50			
0:00:55			
0:01:00			
0:01:05			
0:01:10			
0:01:15			
0:01:20			
0:01:25			
0:01:30			
0:01:35			
0:01:40			
0:01:45			
0:01:50			
0:01:55			
0:02:00			
0:02:05			
0:02:10			
0:02:15			
0:02:20			
0:02:25			
0:02:30			
0:02:35			
0:02:40			
0:02:45			
0:02:50			
0:02:55			
0:03:00			
0:03:05			
0:03:10			
0:03:15			
0:03:20			
0:03:25			
0:03:30			
0:03:35			
0:03:40			
0:03:45			
0:03:50			
0:03:55			
0:04:00			
0:04:05			
0:04:10			
0:04:15			
0:04:20			
0:04:25			
0:04:30			
0:04:35			
0:04:40			
0:04:45			
0:04:50			
0:04:55			
0:05:00			
0:05:05			
0:05:10			
0:05:15			
0:05:20			
0:05:25			
0:05:30			
0:05:35			
0:05:40			
0:05:45			
0:05:50			
0:05:55			
0:06:00			
0:06:05			
0:06:10			
0:06:15			
0:06:20			
0:06:25			
0:06:30			
0:06:35			
0:06:40			
0:06:45			
0:06:50			
0:06:55			
0:07:00			
0:07:05			
0:07:10			
0:07:15			
0:07:20			
0:07:25			
0:07:30			
0:07:35			
0:07:40			
0:07:45			
0:07:50			
0:07:55			
0:08:00			
0:08:05			
0:08:10			
0:08:15			
0:08:20			
0:08:25			
0:08:30			
0:08:35			
0:08:40			
0:08:45			
0:08:50			
0:08:55			
0:09:00			
0:09:05			
0:09:10			
0:09:15			
0:09:20			
0:09:25			
0:09:30			
0:09:35			
0:09:40			
0:09:45			
0:09:50			
0:09:55			
0:10:00			
0:10:05			
0:10:10			
0:10:15			
0:10:20			
0:10:25			
0:10:30			
0:10:35			
0:10:40			
0:10:45			
0:10:50			
0:10:55			
0:11:00			
0:11:05			
0:11:10			
0:11:15			

Enhancement – Text Library/Utility: Reset Overview Keys

A new Utility to reset Overview Keys to restore the relationship between the Text Overviews and the Proposal/Project Overviews has been added. This utility and the utility to groom the Text library will run during the Upgrade process to this SCPS version.

View	Category	Title	Text	Fav	
	Audio	CD-100 disc changer	A CD changer will enable you play 100 CD discs in sequence or	<input type="checkbox"/>	<input type="checkbox"/>
	Audio	Speaker - bookshelf	Hi-fidelity bookshelf loudspeakers will provide beautiful sounding	<input type="checkbox"/>	<input type="checkbox"/>
	Audio	Speaker - ceiling	A pair of ceiling speakers will provide beautiful music and blend	<input type="checkbox"/>	<input type="checkbox"/>
	Audio	Speaker - floor standing	Hi-fidelity floor standing loudspeakers will provide beautiful	<input type="checkbox"/>	<input type="checkbox"/>
	Audio	Speaker - inwall	A pair of in-wall speakers will provide beautiful music and blend	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Audio	Speaker - outdoor	This area will have speakers that are water resistant to	<input type="checkbox"/>	<input type="checkbox"/>
	Audio	Speaker - single ceiling	A single ceiling speaker will provide beautiful music and blend in	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Reset Related Proposal
Keys for Text Overviews**

Reset
Related Proposal
Keys

**Delete Blank
Text Records**

Delete Blank
Text Records

Enhancement – Master Preferences/Groups: Print Options

When printing the Group report you now have the option to show all of the Groups or only the ones showing on the screen (if you use the show by Discipline feature). Also the Product Class, Primary Installation Phase and Assigned Products fields have been added to the report.

Master Prefs - Product Groups

Create Product Groups (with Classifications & Phases) to organize your Products
Assign Supplements (Labor, Parts, Wire and Tasks) to Product Groups
Assign Product Groups to each product in your Product Library

Product Groups

Sort	Rename	Discipline	Category	Type	Product Classification	Primary Install Phase	Products Assigned
e		Automation	Control	Accessory	Pre-Cut Wire & Cable	2 Trim	N
e		Automation	Control	Controller	Bulk Wire & Cable	2 Trim	N
e		Automation	Control	Keyboard	Part	2 Trim	N
e		Automation	Control	Keypad	Product	2 Trim	Y
e		Automation	Infrared	IR Flasher	Product	2 Trim	N
e		Automation	Infrared	Keypad	Product	2 Trim	N
e		Automation	Remote	Handheld Remote Control	Product	3 Final	N
e		Automation	Remote	Touch Screen Control	Product	3 Final	N
e		Automation	Window	Motorized Window Covering	Product	2 Trim	N

Message: Do you want all of the Product Groups or only the Groups showing on this screen?

Showing All

Group Navigator: Automation, Up, Down, First, Last, First Group 1, Go to Last Selection, View by Category

3/3/2011

Product Groups

Page 1

Discipline	Category	Type	Product Class	Primary Install Phase	Products Assigned to Group
Automation	Control	Accessory	Pre-Cut Wire & Cable	2 Trim	N
Automation	Control	Controller	Bulk Wire & Cable	2 Trim	N
Automation	Control	Keyboard	Part	2 Trim	N
Automation	Control	Keypad	Product	2 Trim	Y

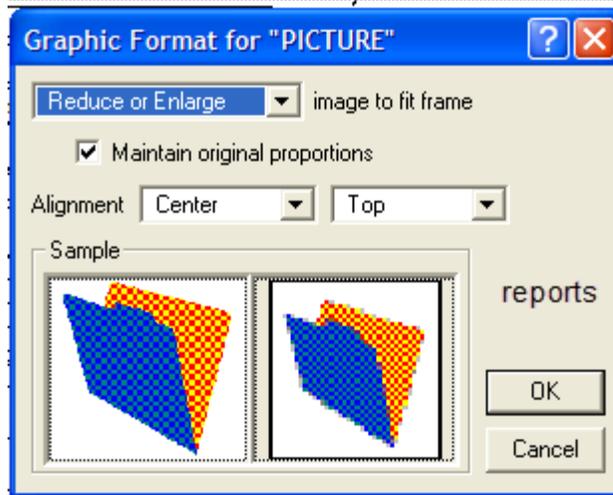
Enhancement – Main Logo Screen: Faster Entering into Entities

Posting and Indexing the Find Entity field has resulted in a significant improvement in the time it takes to enter the Proposals, Projects, Completed and Archives screens.

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

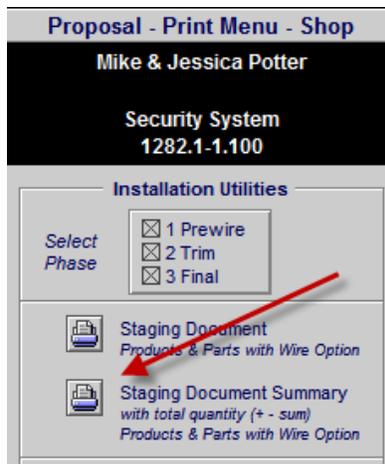
Enhancement – Proposals, Product Library, Contacts, Master Prefs: Pix

All on screen and report picture fields have been reformatted and unified to display product, overview, cover page and contact pictures better.



Fix – Proposal/Print Menu/Shop: Staging Document – Summary

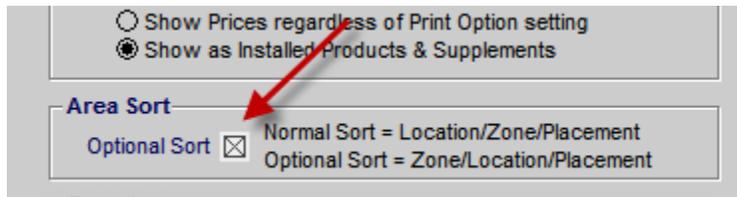
The Staging Document Summary report has been re-engineered to not show any Products, Parts or Wires with negative summed quantities. Also the Parts and Wires are properly classified on the report.



EME Audio & Video Systems - Confidential Report									
3/3/2011 Staging Document - Total Qty Page 1									
Mike & Jessica Potter Security System 1282.1-1.100									
Phase-Class	Qty	Make-Model-SKU-Finish-Description	Order	Ck	InStock	OnOrder	Date	Initial	
3 Final Product	2 ea	Linn : 5101 Personal Handset : Black Universal learning remote	Order	<input type="checkbox"/>					
			Rc'vd	<input type="checkbox"/>					
			Stock	<input type="checkbox"/>					
			Delivered	<input type="checkbox"/>					
		#							
3 Final Product	2 ea	Linn : 5125 : Silver Five channel power amplifier (Black)	Order	<input type="checkbox"/>					
			Rc'vd	<input type="checkbox"/>					
			Stock	<input type="checkbox"/>					
			Delivered	<input type="checkbox"/>					
		#							
3 Final Pre-Cut Wire & Cable	9 pr	Linn : Black Interconnect : Pair of phono-phono leads (Black cable)	Order	<input type="checkbox"/>					
			Rc'vd	<input type="checkbox"/>					
			Stock	<input type="checkbox"/>					
			Delivered	<input type="checkbox"/>					
		#							

Fix – Proposal/Print Option: Zone Sort Order

If you select the Optional Sort your proposal will now sort properly by not placing zone 10 after zone 1, but after zone 11.



Fix – Project Manager/Product History: Include Complete Project Products

The Product History now includes products from Completed Projects.

History of Products Sold									
For Projects, Completed Projects & Final Change Orders									31 Products
View/Print Report for total Qty of each product									
Date Sold	Project	Client/Company	Make	Model	Discipline	Type	Qty	Unit	Sell Price
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RC-35	Audio	Center Channel	1	ea	\$399.00
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RF-35	Audio	Floor	2	ea	\$499.00
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RS-7	Audio	Bookshelf	2	ea	\$450.00
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RSW-10	Audio	Powered	1	EA	\$1,000.00
9/12/2006	1284.1-1.100	John & Mary Smith	Linn	5101 Personal Handset	Automation	Handheld Remote	1	ea	\$390.00
9/12/2006	1285.1-1.100	Mike & Jessica Potter	Linn	5101 Personal Handset	Automation	Handheld Remote	1	ea	\$390.00
9/12/2006	1286.1-1.100		Linn	5101 Personal Handset	Automation	Handheld Remote	1	ea	\$390.00

Fix – Proposal/Project: Hourly Labor Rates changes new Product Picks

Changing the Hourly Labor Rate structures in a Proposal now properly changes the Labor Rates when you Pick Products with Labor, into a Proposal.

Reset Project to Master Prefs Proposal - Project Print ?

Hayes Callahan Done

Home Entertainment System
1294.1-1.100

Client: Project: Info: Contacts: Com Log

Proposal-Project Title: Home Entertainment System Update

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

Hourly Labor Rates

	Labor Category	Sell	Cost
<input type="radio"/> 1	Normal Installation	80.00	40.00
<input checked="" type="radio"/> 2	Retro Fit Programming	100.00	50.00
<input type="radio"/> 3	Contractor Training	120.00	60.00
<input type="radio"/> 4	Wholesale Parts Labor	60.00	30.00
<input type="radio"/> 5	Inner City Wire Labor - Bulk	70.00	35.00
	Wire Labor - Precut	80.00	40.00

Installation Phases Update

1 - Prewire

2 - Trim

3 - Final

Target Project Completion Date.....

Enhancement – Proposal & POS Picking Products: Do not Show Hidden

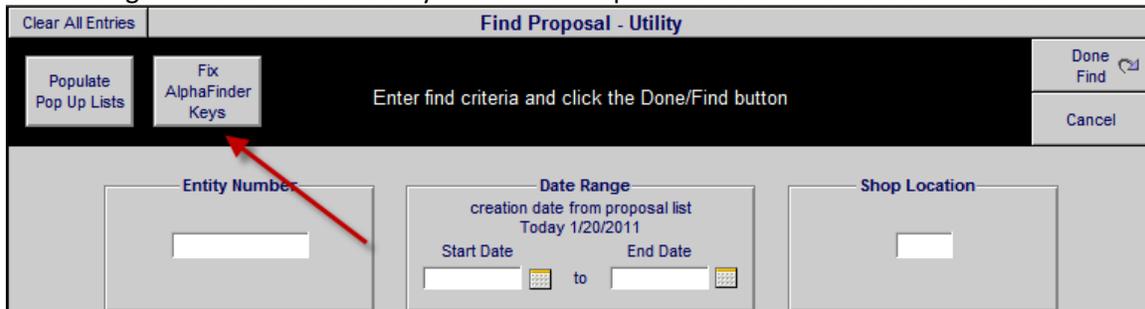
The 1st time you Pick Products into a Proposal or Pending CO or any POS Invoice the Product Library will show only all Active Products and no Hidden Products. The next time you pick products the Product Library will show the last Products you picked, so that you can pick them again or find any Products you wish.

Enhancement – Proposal/Project/Completed Lists: Auto Reset AlphaFinder

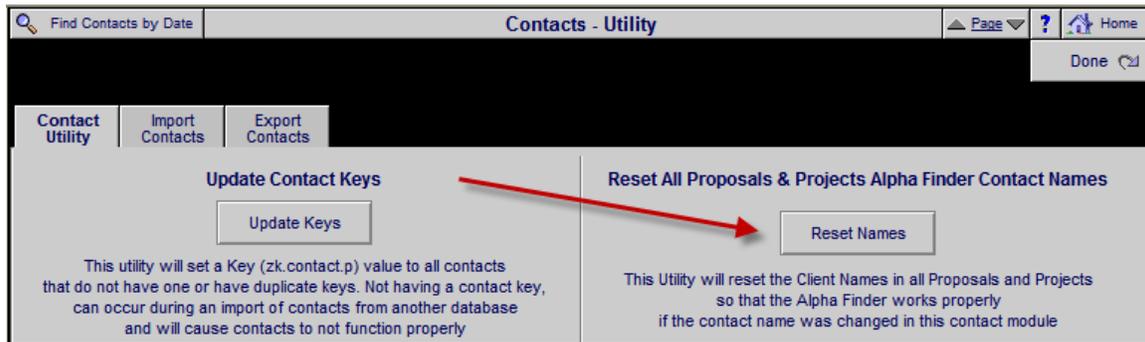
Every time you enter your Proposal/Product/Completed/Archive list screen SCPS automatically resets the AlphaFinder so that it can find all of your Entities.



You no longer need to use this utility in the Find Proposal screens so it has been removed.



You can still manually Reset all of your Alpha-Finder Proposal & Project Names this Utility in the Contact module.



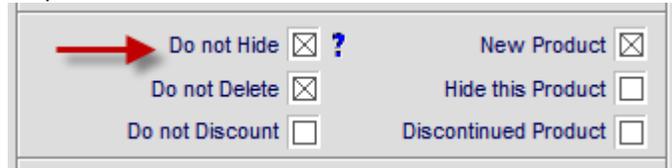
If you Duplicate a Proposal and choose to Clear the Contact Name in the Duplicated Proposal the Client Name/Company is Automatically Cleared.

Enhancement – POS: Automatic Cleaning of Blank Records

Every time you enter you're the POS modules any POS records without an Invoice Number will be automatically deleted.

Fix – Product Library/Utility/RCMS Import: Do Not Hide

Checking the Do Not Hide checkbox now prevents products that are not in RCMS to be Hidden when importing RCMS products into SCPS.



The image shows a screenshot of a software interface with several checkboxes. A red arrow points to the 'Do not Hide' checkbox, which is checked and has a question mark next to it. Other checkboxes include 'Do not Delete' (checked), 'Do not Discount' (unchecked), 'New Product' (checked), 'Hide this Product' (unchecked), and 'Discontinued Product' (unchecked).

Do not Hide	<input checked="" type="checkbox"/>	?	New Product	<input checked="" type="checkbox"/>
Do not Delete	<input checked="" type="checkbox"/>		Hide this Product	<input type="checkbox"/>
Do not Discount	<input type="checkbox"/>		Discontinued Product	<input type="checkbox"/>

SCPS Version 7.15v1
Released: 1/13/2011

Enhancement – SmartPartner Subscription Renewal

You can now continue to work in SCPS once your subscription notification is issued. In the past you were prevented from working until you received a new subscription code.

You will be notified by SCPS when you have 20 days left on your subscription and can send an email or call Horizon for a new code. You can wait for the new code from Horizon or click on the Continue SCPS to keep working in SCPS.



Your SmartPartner subscription license will expire in 89 Days

To renew your subscription, please provide us with your Current Code.

Click on the Email New Code button
or
Call Horizon at 715-287-3335 for a Renewal Code.



Click to email Horizon for a New Code

Current Subscription Code: 73414878179

Please enter your New Code and click Activate.

or
Click Continue SCPS and enter your New Code later,
by clicking on the Horizon Logo from the Login or Logo screen.

Activate



Continue SCPS

Exit SCPS

Caution!

Any attempt to tamper with this security or changing your computer clock,
will be sensed by the SCPS software and will render your subscription invalid.

When you receive your new code, from Horizon, you can click on the Horizon Logo on the Log in or Main screen and enter your new code to renew your SmartPartner Software for another 90 days.

Subscription Renewal
Subscription 89 Days Left
Old Code 73414755801

Click to email Horizon for a New Code

Enter your New Code & click Activate.

Activate

Enhancement – Proposal/Print Menu: Client Intro Letter

You can now add an additional name to the Proposal Client Intro Letter and it will appear below the Sales Specialist Name and Title. This can be used to include a builder or other related person or company.

Proposal - Details [Print] [?]

Cecilia Christenson
Wade Realty
Home Entertainment System
1290.1-1.100

Client | Project
Details | Contacts | Com Log

Maps and Directions Done

Proposal-Project Info [Update]

Proposal Due Date: 10/23/2010
Project Reference:
Blueprint Reference:
Where did you hear?:
Client Referred By:

Shop Info [Update]

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

Additional Proposal Client Intro Letter Signature
Name: John Smith
Title: President
Company: Ultimate Home Builders

Proposal-Project Notes | Permanent Contact Notes | Shop Notes

5Hr. time difference
Pager 808-251-2353

Your house represents a substantial, long-term investment for you. The investment in quality audio and video electronics can greatly increase the enjoyment of your home for many years to come.

Please let me know how I can help make your ideas become reality.

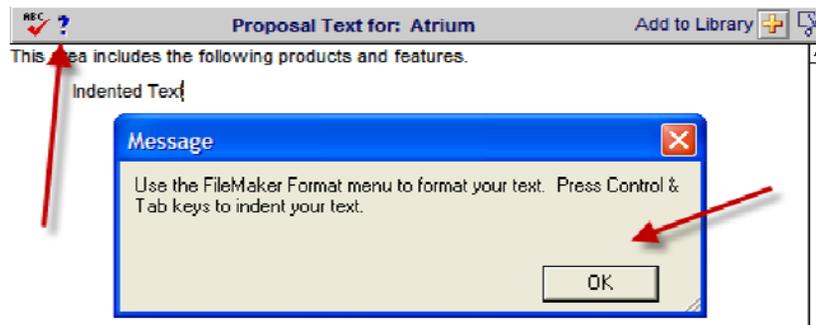
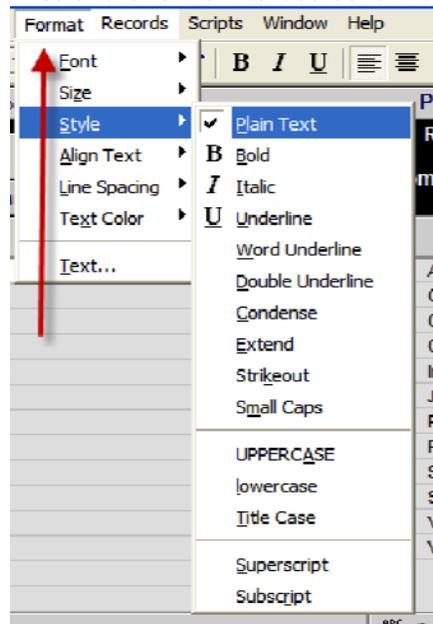
Sincerely,

Jim Engandela
President
Mobile: 715-287-3335

John Smith
President
Ultimate Home Builders

Enhancement – Proposal/Area Text: Help

Area Text and Overview Text can be Formatted using the FileMaker Format menu at the top of the screen. Users can indent text by pressing the Control & Tab keys on their keyboard. A help ? button has been added to the Area and Overview text screens with this information.



Enhancement – Proposals & Projects: Subtotal Labels with Negative \$

Area Subtotals on reports with a negative dollar amount now display properly instead of being suppressed.

Enhancement – Project & POS Work Orders: Tracker Appointments

You can now add Master Tracker Appointments directly from Project and POS Work Orders. You can Add and Edit/Delete these Appointments and the Appointment date/time will be displayed on the Work Order screens.

WO Number 2007 - 1286.1-1.100 WO Date 9/13/2006 Posted Date 9/13/2006		Work Order Detail		<input type="button" value="Delete WO"/> <input type="button" value="Setup"/> <input type="button" value="Prev/Next"/> <input type="button" value="Help"/>
Master Tracker Appointment WO Items Total Time 89:37 <input type="button" value="Add"/> WO Additional Time <input type="text"/> WO Time Total 89:37 <input type="button" value="Edit"/> Requested Installer <input type="text"/> Appointment: 1/5/2011 9:00 AM		Whole House Music System 1286.1-1.100		<input type="button" value="Post WO"/> <input type="checkbox"/> Show Area Text <input type="checkbox"/> Hide Time
		WO Notes		<input type="button" value="Create Continuation WO"/> <input type="button" value="Pick List"/> <input type="button" value="Done"/>
				<input type="button" value="Auto Set Installed Qty"/> <input type="button" value="Install Tasks"/> <input type="button" value="Print & Post"/> <input type="button" value="View"/>
				Install Log Global Entry <input type="button" value="Add"/> Total Left to Install 3 Total Time <input type="button" value="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 0:50:00		<input type="button" value="View"/>
3 <input type="text"/> Universal learning remote				<input type="button" value="View"/>

<input type="button" value="Print Setup"/> <input type="button" value="Delete WO/CO"/>	POS - Work/Change Order		<input type="checkbox"/> Pick Price Cue <input type="checkbox"/> Done	<input type="button" value="Home"/>
<input type="button" value="Print"/> <input type="button" value="Preview"/>	WORK ORDER WS #4394		<input type="button" value="Set Up"/>	<input type="button" value="Done"/>
		3 of 3		<input type="button" value="Prev"/> <input type="button" value="Next"/>
6/11/2003		Label Home: <input type="checkbox"/> Show <input type="checkbox"/> Hide	WO Total Time 1:30	
Jamie & Sheryl Salter Gen-x Sports Inc. 136 Forest Hill Road Toronto, ON M5N 1T8		Jamie & Sheryl Salter Gen-x Sports Inc.		Master Tracker Appointment Requested Installer LB <input type="button" value="Add"/> <input type="button" value="Edit"/> Appointment: 1/5/2011 9:00 AM

POS Work Order Appointment	
Created for Jon Oster	
Appointment Owner <input type="text" value="Joel Roberts"/> <small>Default = Current User</small>	Appt Description Work Order #: WS #7205 WO Install Time Total: 7:00:00 Requested Installer: LB Service Requested: ff Special Instructions: sfdasf
Date & Time Date <input type="text" value="January 5, 2011"/> Time <input type="text" value="1:00 pm"/>	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

Show All		Find Items		Proposals		Master Tracker		Milestones		Util		Home	
New Task		Past Today		Change Orders		Wednesday January 5, 2011 User: Jim Engandela 14 Items 151 Total		Proposals Due		Gantt		Leave	
New Appointment		This Week		Completed				Install Phases		Calendar		Email All	
		This Month		Tasks				Payments Due		Tracker		Print Menu	
		Next Month		Appointments				Purchasing Due					
Adm Done		Due Date		Tracker Item		Proposal Project		Item Owner		Total Labor 8:35		Auto Tag	
Mar Hide		Month - Day		Item Name		Client		Email		Total Pymts \$18,388.01		eMail Info Tag	
User		Appoint Time		Description		Company		Status/Notes		Print CC		Delete	
1/5/2011		Jan - Wed		Appointment		POS WS #4394		Jim Engandela					
9:00 AM				POS Work Order Appointment		Salter, Jamie & Sheryl		No email					
				Work Order #: WS #4394		Gen-x Sports Inc.		Work Order #: WS #4394					
1/5/2011		Jan - Wed		Appointment		1285.1-1.100		Jon Oster					
10:00 AM				Work Order Appointment		Mike & Jessica Potter		No email					
				Work Order #: 2008 - 1285.1-1.100				Work Order #: 2008 - 1285.1-1.100					

Enhancement – Project Change Orders: Remove Currency Symbol

The currency symbol has been removed from the Pending and Final Change Order Totals to accommodate users from all countries.

Enhancement – Product Library/Product Detail: Make & Model Validation

It is important that all items in the Product Library have a Make and Model. You will now not be allowed to leave, duplicate or create a new product until you have entered both a Make and Model.

Find Products		Replace Data		Product Library - Product Detail		1982 of 1982		Home	
Duplicate Product		1,982 Items 1,982 Total		Equipment : :		New Product		Done Return to List	
Delete Product								Prev Next	
Product		Specs		Pix		PD		Labor	
Parts		Wire		Tasks					
Make		Unique Model		SKU		Finish		Description	
Features		NEC							

Message

Both Make and Model must have values. Please click OK and populate them both.

OK

Enhancement – Product Library/Inventory Control: New Features

The Inventory Control screen now incorporates a Manual Count as well as the Automatic Count. The usage of both are explained in the header on this screen.

The Automatic Inventory Count changes when a Project PO Qty is Received and with the Project Sales Invoice Qty. The Manual Inventory Count is for users that wish to log Project and POS Qty changes and allocate them to On Loan and In Service as well. Posted Manual adjustments also updates the Automatic Qty on Hand.

The Show Inventory Total \$ Values button displays the Total \$ of all Inventory. The Print button at the top of this screen now shows the Invoice Log.

Product Library - Inventory Control									
Manual Inventory Guide									
Automatic Inventory Guide									
132 of 151 Items			Manual Inventory Count				Automatic Inventory Count		
Make	Phantom	Hidden	Qty	Projects & CO's	POS	Qty On Loan	Qty In Service	Qty On Hand	S-Value
Linn	<input type="checkbox"/>	<input type="checkbox"/>		1 1284.1c1-1.100	11/22/2010			5 ea	\$1,170.00
5101 Personal Handset	Black								
Linn	<input type="checkbox"/>	<input type="checkbox"/>		2 1284.1c3-1.100	1/7/2011	2		8 ea	\$26,400.00
5103 System Controller									
Linn	<input type="checkbox"/>	<input type="checkbox"/>		1 1285.1-1.100	11/22/2010		1	14 ea	\$9,240.00
Akito	Black								

Product Library - Inventory Values			
Inventory on Hand is determined by Physical Count + Project PO Receiving Qty - Invoicing Qty			
153 of 151 Items			
Optimum Level	In Service	On Loan	Inventory on Hand
\$1,695,942.60	\$1,557.00	\$13,764.00	\$1,451,888.30

Enhancement – Product Library/Utility Lists: Opt Inventory

The Optimum Inventory Qty and ReOrder Point Qty now have their values shown in a List view to make it easier to change and review these values.

Product Library - Opt Inventory Utility									
151 Items 153 Total									
Opt Inventory									
Displn	Cat	Type	Class	Make	Model : SKU	Optimum Qty	Opt \$ Value	ReOrder Point	
Audio	Multi	Keypad	<input checked="" type="radio"/>	Linn	5101 Personal Handset	6	\$1,404.00	2	
Audio	Ampli	Surround Process	<input checked="" type="radio"/>	Linn	5103 System Controller	6	\$19,800.00	2	
Audio	Sourc	Phone	<input checked="" type="radio"/>	Linn	Akito	6	\$3,960.00	2	

Enhancement – Product Library/Utility/Export: New Export List

The Product Library/Utility/Export screen now includes Discontinued Products and the Field Export List has been modified to include the Hidden and Discontinued product flags and eliminate unnecessary fields.

Product Library Utility - Export Products									
110 Items 153 Total									
3 Check Makes 5 Omit Products									
Displn	Cat	Type	Class	Make	Model : SKU	Description	Finish	Sell Price	Hidden
Audio	Speak	Center Channel	<input checked="" type="radio"/>	Klipsch	RC-35	Center Channel	Black	399.00 ea	
Audio	Speak	Floor	<input checked="" type="radio"/>	Klipsch	RF-35 (6483)	Reference Tower	Black	499.00 ea	

Enhancement – Product Library/Inventory: Print Inventory Reports

The Product Library Inventory Count screen now has a new Print Inventory button which takes you to an Inventory Print Menu to print selected Inventory Reports.

132 of 151 Items		Manual Inventory Count				Automatic Inventory Count		
Make	Phantom	Qty	Projects & CO's	POS	Qty On Loan	Qty In Service	Qty On Hand	S Value
Model	Finish	Invoice Log					Adjust Qty	Post
<input type="radio"/> Linn 5101 Personal Handset	<input type="checkbox"/> Black		1 1284.1c1-1.100 11/22/2010				5 ea	\$1,170.00
<input type="radio"/> Linn 5103 System Controller	<input type="checkbox"/>		2 1284.1c3-1.100 1/7/2011		2		8 ea	\$26,400.00
<input type="radio"/> Linn Akito	<input type="checkbox"/> Black		1 1285.1-1.100 11/22/2010			1	14 ea	\$9,240.00
<input type="radio"/> Linn Akiva	<input type="checkbox"/>						5 ea	\$8,850.00

Product Library - Print Inventory Dock

Inventory Reports
Preview or Print Options

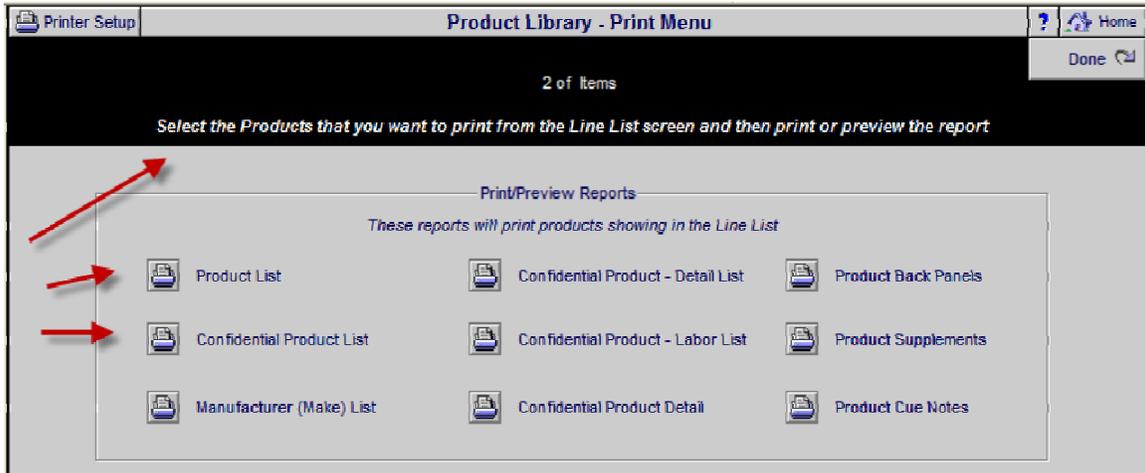
- Print Report with the Current Found Set
- Show **only** Products with a Qty on Hand
- Show **all** Products including Hidden products
- Show **all** Products not including Hidden products
- Show **all** Products with negative Qty on Hand
- Show **only** Hidden Products

Inventory ReOrder Report
Preview or Print Options

- Inventory ReOrder Report

Enhancement – Product Library/Print Menu: Hidden & Discontinued flags

Both the Product Line List and Confidential Product Line List reports now show both the Hidden and Discontinued flags. Also all of the reports on the Print Menu screen only print the products that have been selected from the previous Product Line List screen prior to entering the Print Menu screen. The Confidential Product Line List also shows Qty On Hand



12/8/2010 Page: 1

Product List

Make	Model	Hidden Discontinued	Discipline	Category	Type	Sell
Linn	5101 Personal Handset	<input type="checkbox"/>	Audio	Multi	Keypad	390.00 ea
	Black	<input type="checkbox"/>	Universal learning remote			

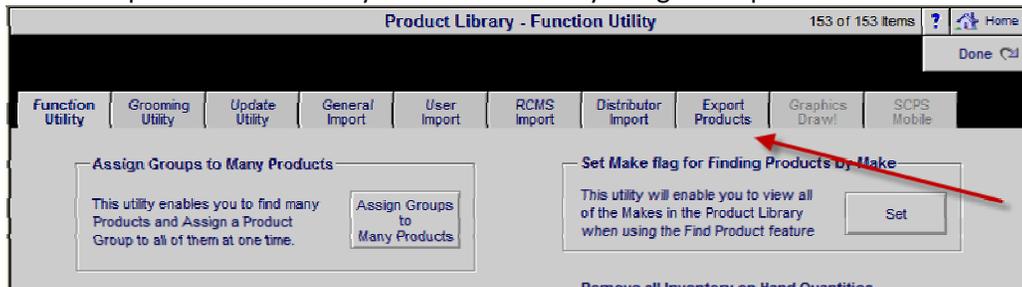
1/7/2011 Page: 1

Confidential Product Price List

Make	Model	Hidden Discontinued	Qty On Hand	Cost	Sell Price	Min Sell	List
Linn	5101 Personal Handset	<input type="checkbox"/>	5	\$234.00	\$390.00		
	Universal learning remote	<input type="checkbox"/>	ea		\$300.00		40.0%
Linn	5103 System Controller	<input type="checkbox"/>	5	\$3,300.00	\$5,500.00		
	Linn 5103 inc DTS. no RF demodulator	<input type="checkbox"/>	ea				40.0%
Linn	Akito	<input type="checkbox"/>	6	\$660.00	\$1,100.00		
	Pick up tonearm	<input type="checkbox"/>	ea				40.0%

Enhancement – Product Library/Utility: Export Products Tab

You can now Export Products from your Product Library using the Export Tab.



Enhancement – Product Library/Utility/RCMS Product Import: Descriptions

Listen Up's SCPS product descriptions are now retained during the importing of RCMS product data.

Listen Up Audio Video <input type="button" value="Import"/>	Update prices on products with the same Make and Model. Add products that do not exist in the Product Library. Update Product Groups and Class, Not Descriptions. Product Text will be groomed automatically. Product Units will be changed from Each=ea, Foot=ft, Pair=pr.	Price A iv107 = pd.unit.sell Price B iv108 = pd.unit.list Price D iv110 = pd.unit.sell.min Comm Cost iv024 = pd.unit.cost
---	---	--

Enhancement – Master Preferences/Proposals/Contract: Add Contract #4

The number of Proposal Contracts has been increased from 3 to 4. You can name and create this 4th Contract in your Preferences/Proposals/Contract screen and select this Contract in a Proposal from the Proposal/Print Menu/Print Options screen.

Contract

<input checked="" type="radio"/> Default	<input type="radio"/> Use Contract 1	Contract 1
<input type="radio"/>	<input type="radio"/> Use Contract 2	Contract 2
<input type="radio"/>	<input type="radio"/> Use Contract 3	3
<input type="radio"/>	<input type="radio"/> Use Contract 4	New Contract Option #4

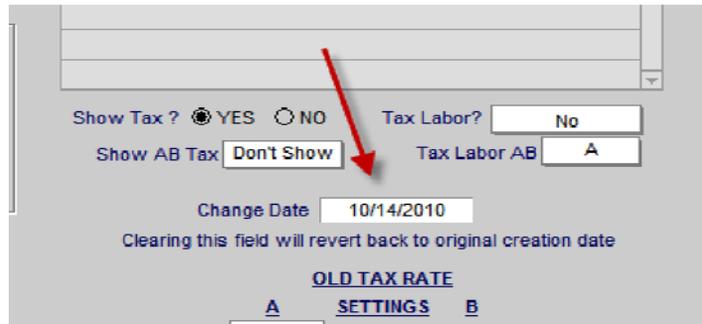
Enhancement – Master Preferences/Users/Access Rights: Only CPS

You can now block Users from access to the SCPS modules and ONLY give them access to CPS (Custom Proposal System). This can be set for each User and is helpful for SmartPartners who are upgrading from CPS and wish to block users from SCPS until they are authorized. Do not check this box for normal SCPS access as it overrides all other User Rights on this screen.

Check All	Uncheck All	User Access Rights	Sort Users	◀ Prev/Next ▶	? Home
User Assignable Favorites <input type="checkbox"/>	No "Add Product" Prompt <input type="checkbox"/>	Jim Engandela President	PC Screen Size Computer	Done	Commissions
Empty = "Global" Fav's		Checked boxes have Access Rights Unchecked boxes do not have Rights	Screen Magnification 100%		
Module/Screen Access <input checked="" type="checkbox"/> Preferences <input checked="" type="checkbox"/> Project Manager <input checked="" type="checkbox"/> Utilities <input checked="" type="checkbox"/> Proposal & Project Utility Access to Admin Utility <input checked="" type="checkbox"/> Modify Proposal & Project Salesman's Commissions <input checked="" type="checkbox"/> Proposal Custom Print Layouts <input checked="" type="checkbox"/> CPS Custom Proposal System <input checked="" type="checkbox"/> Only Allow Access to CPS not SCPS	Access Level Administrator Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects Proposals - Projects - Completed Archives - Change Orders <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate	Projects <input checked="" type="checkbox"/> Override the Print Menu Preferences and Print Options Lockout Contacts <input checked="" type="checkbox"/> Delete Point of Sale <input checked="" type="checkbox"/> Delete/Archive Invoices Edit <input checked="" type="checkbox"/> Sell Price			

Enhancement – POS/Invoices: Today's Date

When creating new POS Invoices and Quotations the date of the invoice now shows in the Invoice Setup screen and can be modified.

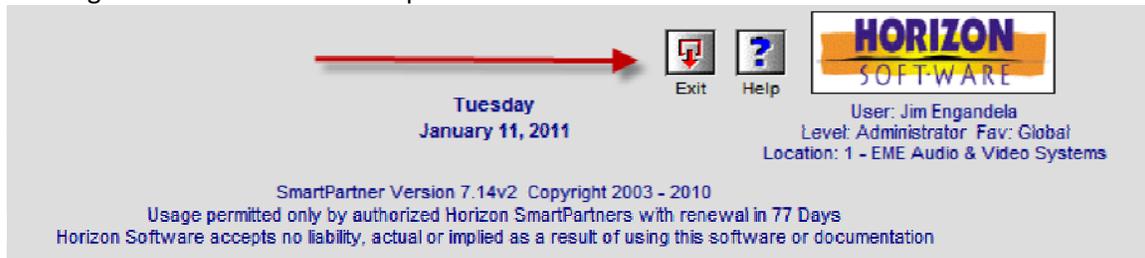


Enhancement – POS/Invoices: All Reports reformatted to Print A4 size

All POS Invoices and Reports have been reformatted to print on A4 paper size as well as the current Letter size.

Enhancement – SCPS Exit Routine now cleans all files on Exit

When Exiting the SCPS software all database files are set to the Fast Open screen and all records are set to the All Found state which properly prepares them for future upgrades. In addition to this the Upgrade routine cleans the Wire, Tasks, Text and Product databases prior to upgrading insuring that all records will be imported.



Fix – Project/PO,WO,SI: Remove No Records Found Message

When entering the Project PO,WO,SI modules based on some conditions you would get a “No Records Found” message. This will only occur now if there truly are no Product/Parts/Wire records in your Project.

Fix – Master Tracker: Find Next Month Items: Fix end of year

During the last month of the year (December), this feature was not finding January's items. This has been fixed.

Show All		Find Items		Proposals		Master Tracker		Milestones		Util		Home	
New Task		Past Today		Projects		Monday		Proposals Due		Gantt		Leave	
New Appointment		This Week		Change Orders		December 6, 2010		Install Phases		Calendar		Email All	
		This Month		Completed		User: Jim Engandela		Payments Due		Tracker		Print Menu	
		Next Month		Tasks		4 Items 283 Total		Purchasing Due					
		Appointments		Appointments									
Due Date		Tracker Item		Proposal Project		Item Owner		Total Labor		Auto Tag			
Month - Day		Item Name		Client		Email		6.45		eMail Info		Tag	
Appoint Time		Description		Company		Status/Notes		\$12,258.67		Print		CC	
1/4/2011		Project Milestone - Install		1285.1-1.100		Jim Engandela		6.45					
Jan - Tue		Install Hours		Mike & Jessica Potter		No email							
		Phase 1 - Prewire - Installation											
1/4/2011		Project Milestone - Payment		1285.1-1.100		Sandy Engandela		\$3,064.67					
Jan - Tue		Payment		Mike & Jessica Potter		horizonse@trivest.net							
		Deposit - Payment											