



SmartPartner Software
2012 Entire Year Revisions
New Features, Enhancements and Fixes
Year to Date Revision Guide

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 see info below.

SCPS Version 9.8v3b

Released: 12/20/2012

Fix – Proposal/Option Prices: Show All setting

The “Show Sell Price” setting that displays the Option price in the description of a Product now works properly.

Discipline	Area	Phase	Proposal - Detail by Area			View	Utility	Home
Client	Areas	Area Text	Eileen Back			Pricing	Purchasing	Leave
Project	Info	Products	Home Entertainment System			Tracker	Work Orders	Change Orders
Contact	Log	Supplements	1308.1-1.100			Payments	Invoicing	Print Menu
Client Mode <input type="checkbox"/>	Wire Manager	Super View				Labor Meter	Labor Total	Grand Total
Discipline : Category : Type			Make : Model			Description		
			Home Entertainment System			Area Totals		
			Atrium					
Audio : Multi-room : Keypad			1 ea Linn : S101 Personal Handset			*Option: Ext Price \$390.00 Universal		
						Option		

Areas & Products Report - "Pricing"

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

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

Area SubTotal Prices

- ☒ Show Area Totals
- ☐ Hide Area Totals

Enhancement – Master Prefs/Other/Counters: New Login Exit Time

You can now enter values of one minute, one minute and 30 seconds or 30 seconds in the the Login in Exit Timer.

Login Timer

Login Exit Time
Hours : Minutes : Seconds

Clear

SCPS will exit automatically if left at the log in screen.
Default if Empty = Exit in 2 Minutes

Auto exiting SCPS prevents users from sitting at the
Log in screen and tying up a User License.

Enhancement – POS/Utility: Add new Numbers and Keys screen

The POS Keys screen has now be separated into a new screen, which makes the Renumbering screen much faster to adjust number.

Update Client Contact
Info on all POS
Invoices from the
Contact Library

Set all Invoices
to
Show AB Tax

Reset all POS
Invoices to the
Manual
Override Contacts

Update Specialist
field by Importing
previous SCPS
POS file

Manually Set
Invoice Numbers

Set all List
Total Amounts

Reset all POS
Invoices to Master
Tax Location & Rates

Find all POS
Invoices that do not
have corresponding
Contacts

Full Numbers
and Keys screen

Find Quote		All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Print List	Set Setup invoice number to max #	POS Numbers & Keys Utility 438														Delete Empty Invoice #	Find Duplicate #	Done										
Invoice	Client	Company	Date	Invoice #	Amount	Del	Lookup Record #	zk_contact.p	zk_pos.p	Invoice.c	Current Highest Invoice Number:	Orphaned Contacts	Specialist															
SO #2534	Randy Steinberg		7/5/1999	2534 SO						SO #2534	7196	1																
SO #2632	David & Sally Laren		0/13/1999	2632 SO						SO #2632	7196	1																
CO #4163	Jeff Hanemaayer		4/9/2003	4163 CO	\$5,641.41					CO #4163	7196	1	Chad Trude															
WS #4394	Jamie & Sheryl Salter	Gen-x Sports Inc.	6/11/2003	4394 WS	\$1,862.74					WS #4394	7196	1	Robert															
WS #5672	Tracy Kyne	Leeward Hedge Funds Inc.	0/16/2004	5672 WS						WS #5672	7196	1																

Enhancement – Product Library/Product Detail/Specs/Entities: Find Products in Entities

This utility will find all of the Items in your Product Library that are classified as “Product” and are Un-Hidden and are used in Proposals and Projects.

Product Library - Product Entities 1 of 23 ? Home

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

Show All Items in Entities Show only Un-Hidden Products in Entities Done Prev Next

Entity Types
Proposals
Projects and Change Orders
Completed
Archives

Entities this "Product" is attached to

Proposal	1267.1-1.1.10
Proposal	1267.1-1.1.10
Proposal	1273.1-1.1.10
Proposal	1274.1-1.1.10
Proposal	1282.1-1.1.10
Proposal	1282.1-1.1.10
Proposal	1301.1-1.1.10
Proposal	1301.1-1.1.10
Proposal	1301.1-1.1.10
Proposal	1301.1-1.1.10

Entity Validity

Valid Product	1
No Delete	0
Valid Proposal/Project	1
Valid Part Group	
Valid Part Manual	1
Valid Wire Group	
Valid Wire Manual	1

Enhancement – Product Library/Product Detail: Improve Make-Model field Validation

The Make and Model and finish fields have a new improved validation formula that will accept more conditions.

Substitute(
Substitute(
Substitute(
Substitute(
Substitute(

Trim(
Left(pd.make,3)) &

Trim(
Right(pd.model, 14)) &

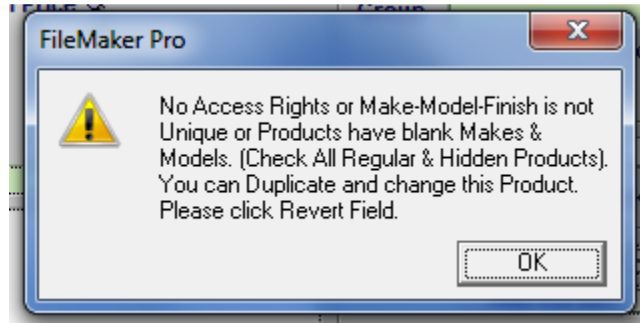
Trim(
Left(pd.finish,3)),

"-" , ""),
"/" , ""),
"(" , ""),
")" , ""),
" " , "")

Released: 12/13/2012

Enhancement – Product Library/Product Detail: Duplicate Product Error Message

The Duplicate Product Error message now does not consider “-” dashes or “/” slashes in the Validation calculation. This provides you with more flexibility when adding or duplicating products that have more than one “-” or “/” in the model number.



Enhancement – Project/Wire Manager: Head Layout & screen size

The Wire Manager window now opens full screen regardless of the User Window size default setting. The layout has been reorganized for better comprehension and usage notes have been added. Exiting the Wire Manager minimizes the window so that it does not appear in the background.

1. Set desired Sort Order 2. Enter Product Install Notes 3. Set Head End 4. Assign End Product or Head End 5. Auto Set Wire ID's 6. Print Wire Chart or Labels		Sorted by Zone/Area <div>DisciplineZone/Area</div> <div>DisciplineZone/Area</div> <div>TypeMake/Model</div> <div>Wire IDWire ID</div>		Product Install Notes <div>Install Notes</div>		Proposal - Wire Manager <div>Eileen Back</div> <div>Home Entertainment System</div> <div>1306.1-2.101</div>				Head End <div>Head Ends</div> <div>Select a Head End and assign to a End Product</div>		<div>Print Setup</div>	<div>Wire Chart</div>	<div>Wire Labels</div>	<div>Done</div>	<div>AutoSet Wire ID's</div>
<div>DisciplineType</div>		<div>Source Product</div> <div>Product Install Notes</div>				<div>Wire Connected To</div> <div>Wire ClassWire Make - Model</div>				<div>Assign End ></div> <div>Add Head End notes in the Head End field</div> <div>End Product Install Notes</div> <div>Override Install Notes</div>				<div>Wire ID</div>		
Audio Keypad		Atrium - Linn : 5101 Personal Handset				Pre-Cut Linn : Black Interconnect Pair of phone-phonle leads (Black				Product Head Telephone KSU Head End				Src-0001 End-0001		

Enhancement – Proposal & Change Order/Pick Products: Speed increase

The process of Picking products into a Proposal & Change Order has been sped up by switching to the Fast Open screen during the pick process.

Find Products		Fav A		B	C	Product Library - Pick Products																	AlphaFinder Show Makes <input checked="" type="checkbox"/> Hidden <input type="checkbox"/>						▼ ▲ ↻ ?			
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 All		Recent Products		Clear Picked Products		Add Products to Atrium																		Phan Part		Pick ➔				
Part Phantom		Hidden		Proposal Products		Show Picked Products																				3 Items 58 Total		New Product		Cancel		
Bulk PreCut		Discontinued																														
<input type="checkbox"/> Show All Groups				Pick Qty		Make		Model : SKU		Description 🔍		Finish 🔍		Sell Price (Installed)		View Hide Fav																
↓ Displyn		Cat		Type		Class																										
Audio		Multi		Keypad		Linn		5101 Personal Handset		Universal		Black		390.00 ea																		
Audio		Ampli		Surround Receive		Linn		Classik Movie Di		Integrated		Black		3,995.00 ea																		
Audio		Speak		Bookshelf		Linn		Katan		Bookshelf		Black		995.00 nr																		

Enhancement – Logo Screen/Utility: Show Database Record Count

This Utility displays the total number of records in these Databases and the number of records in the current found set.

Database Record Count		
	Total Records	Found Records
Labor Records	765	765
Part Records	705	705
Wire Records	619	619

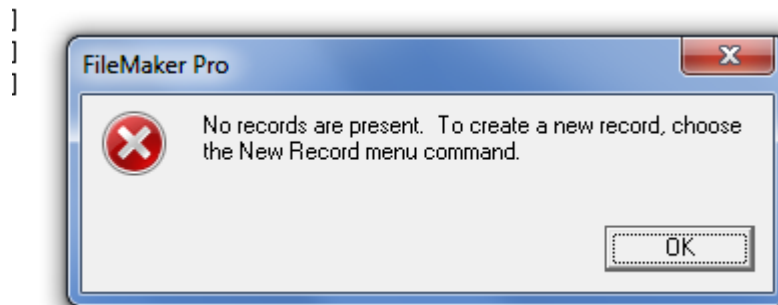
Enhancement – Upgrade Utility/Exit: Run Show All Records on Exit

After upgrading SCPS, clicking the Exit button sets all Databases to Show All Records.



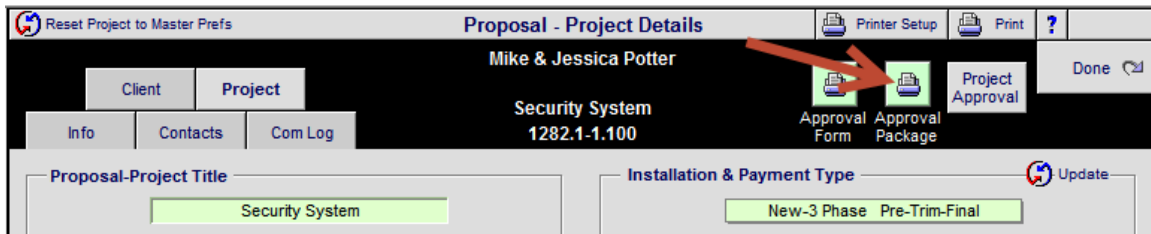
Fix – The no Records are present message has now been trapped so it will no longer appear

This message has been removed from all modules.



Fix – Project Approval Package: Post A&P Preliminary Totals

When Printing the Approval Package from the Project Details screen the Proposal Totals are now Posted so that they are accurate, just the way it does when printing the Print Menu.



Electronics & Installation

	Equipment	\$45,819.90
	Installation	\$2,491.67
	Misc. Parts	\$2,031.82
\$57,782.18 List Price	Wire & Cable	\$6,082.40
-\$200.00 Courtesy Discount	Additional Fees	\$1,156.40
\$57,582.18 Total	Total	\$57,582.18
	Tax	\$2,986.17
Prices quoted are guaranteed until: 1/19/2013	Grand Total	\$60,568.35

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.

SCPS Version 9.8v2

Released: 12/6/2012

Enhancement – Contacts/Print Menu: Contact: Address : Email report

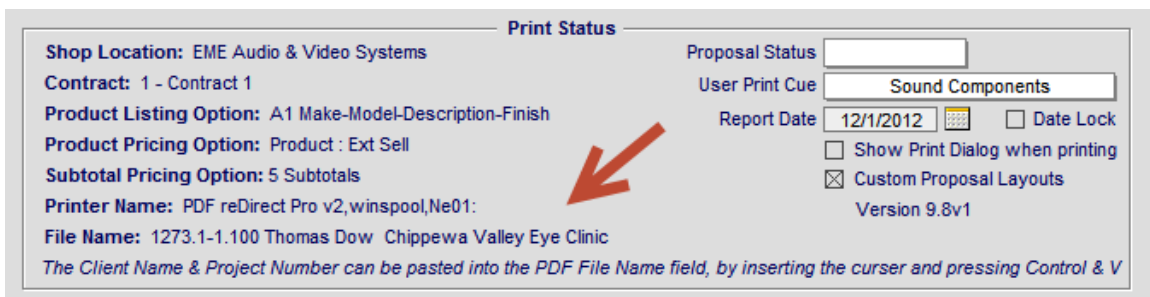
A new report has been added to the Contact/Print Menu which shows the Client Name : Address : Email



12/3/2012	Fav Contact List				1
Category	Key	Class	Status	Group	
Client					
CLIENT - ADDRESS - EMAIL					
Back, Eileen : 567 58TH Street : Oakland, CA 94607 :					
Bashir, Sikandar : 567 58TH Street : Oakland, CA 94607 :					
Berkow, Dana : 567 58TH Street : Oakland, CA 94607 : berkow@mac.com					
Burkes, Tom & Kelly & Family : 567 58TH Street : Oakland, CA 94607 : kelly@burke.to					

Enhancement – Proposal/Print Menu: Display File Name and remove pop up message

The File Name that can be pasted into a PDF file name field has been added and the pop up message indicating this when printing a report has been removed.



The Client Name & Project Number can be pasted into the PDF File Name field, by inserting the cursor and pressing Control & V.

Fix – Master Prefs/Other/Projects 2: Always Add Default Fees

The option to Always Add Default Fees to a New Change Order now works properly.

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

Change Order Preferences

- ☐ Show the Original Project Area Text in addition to the CO Area Text.
- ☐ Do Not Show the Change Order Numbers on the Areas & Products Report (global pref)
- ☒ Always Add Default Fees to a new Change Order and suppress the user pop up option.
- ☐ Always use CO Default Payment plan to a new Change Order and suppress the user pop up option.

Fix – Proposal/Fees/Services: Remove key field

A key field used for programming has been removed from the Services portal.

Report Header		zi.labelAddFees.lo		<<zi.transHdr1.c>> - Project Fees		Print	?	Home
				zi.propNameFull.c zi.propCompany.c zi.propDescript.c zi.propFull.c		Replace All Fees with Default Fees		
esTabLabel.projectsTabLabel.servicesTabLabel.expenses								
New				Project Fees				
Project Fee Type				Percentage		Flat Fee		Tax Status
Pick	Sort	Fee SKU	Phase	Description	Fee Type	Percent of	Sell Amount	A B
		pp.feeType	ph	f.feePctOrAmo	p.feePercent	Percent	Manual Entry	Percent
		zk.feeSKU.p		pp.feeDescript				zk.mProp
								remove

SCPS Version 9.8v1

Released: 11/28/2012

Enhancement – Login Screen: User Number, Level and Exit Time added to Log in screen

User numbers and Access Level have been added to the User Portal and Users can be sorted by their User Number as well. Since the Auto Exit time can now be set by Users in the Master Preferences module, the actual Auto Exit time is now also displayed.

SmartPartner SOFTWARE
High Definition Proposal & Project Management System

Sort User Number 1 - Select User

#	Location	User	#	Level
1	EME Audio & Video Systems	Jon Oster	JO45	Mgr
1	EME Audio & Video Systems	Dave Dowling	51	Adm
1	EME Audio & Video Systems	Jim Engandela	100	Adm
2	Horizon	Sandy Engandela	101	User

2 - Enter Password for Jim Engandela

Password

Enter Password
Click the Login button
Do not press the Enter key

3 - Login

Please Login within 0:02:00 minutes or SCPS will Exit
Use on-screen buttons to navigate SCPS
Underlined text are buttons that can be clicked
Use Tab key, not Enter key to move between fields
Use the Mouse scroll wheel only on Line List screens

Exit Help **HORIZON SOFTWARE**

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SmartPartner Software renewal in 90 Days
Horizon Software accepts no liability, actual or implied
as a result of using this software or documentation

Enhancement – Login Screen: User number added to display

The current Users number has been added to the User Name display on the main logo screen.

Exit Help **HORIZON SOFTWARE**

User: Sandy Engandela 101
Level: User Fav: Global
Location: 2 - Horizon

Enhancement – Proposal/Project/Completed Lists: User Level

The Current User Number and Access Level is now displayed on the List views and this insures that only those Proposals/Projects/Completed are shown in the list that pertain to the Current User.

Status	Dup	View	CO	Number	User	Client	Company	Project Title	Sold	Total	Fav
				1297.1-1.45	Jameson, John			Home Entertainment	11/20/2012	\$0	
				1296.1-2.101	Burkes, Tom & Kelly &	Sunbelt Business Brokers		Home Entertainment	11/20/2012	\$0	
				1295.1-1.51	Back, Eileen			Home Entertainment	11/20/2012	\$0	
				1285.1-1.100	Potter, Mike & Jessica			Home Theater System	9/12/2006	\$30,647	
				1284.1-1.100	Smith, John & Mary			Home Entertainment	9/12/2006	\$96,963	A
				1283.1-1.100	Callahan, Hayes			Home Theater System	11/20/2012	\$30,647	
				1268.1-1.100	Berkow, Dana			Home Entertainment	9/12/2006	\$70,560	

Enhancement – Master Prefs/User Rights: Commission Access Rights

Access to the Proposal/Project & Change Order Commission screens is now controlled by the Commission Rights for each User. If the checkbox is checked users will have access to the Commission screen.

Enhancement – Proposal & Project & Change Order/Project screen: Approval Form screen

A new Approval Screen and Printed Report module enables you to modify a Proposal/Project's data and generate an Approval form to your staff, prior to selling a Proposal or scheduling a Project. This module can be accessed from the Proposal/Project/Change Order – Project screen, as well as the Print Menu/Shop screen.

Project Information Required		Proposal - Project Approval		Printer Setup		
White fields can be modified on this screen.		Mike & Jessica Potter		Approval Form		
Green fields are modified on the Client/Project screens.		Security System 1282.1-1.100		Approval Package		
Sales Specialist Jim Engandela		Salesman's # 100		RCMS Acct #		
				Percentage of Job 75 %		
<u>Client Address</u>		<u>Billing Client</u> Same if blank		<u>Phone Numbers</u>		
Mike & Jessica Potter 567 58TH Street Oakland, CA 94607				Home Phone 715-830-5022 Ext <input type="text"/>		
				Work Phone <input type="text"/> Ext <input type="text"/>		
				Cell Phone <input type="text"/>		
				<u>Client Referred By</u>		
				Friends <input type="text"/>		
<u>Installation & Payment Type</u>		<u>Project Level:</u> <input type="checkbox"/> Level 1 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 3		<u>Project Type:</u> <input type="checkbox"/> Standard <input type="checkbox"/> Fast Track		
New-3 Phase Pre-Trim-Final						
<input type="checkbox"/> Trade Contacts are entered in SCPS		<u>Install Phase Dates</u> Start Dates <input type="checkbox"/> Real Date		All estimated scheduling dates are to be confirmed by Project Management and are subject to change based on project status.		
		1 - Prewire <input type="text"/> <input type="checkbox"/>				
		2 - Trim 2/1/0001 <input type="checkbox"/>				
		3 - Final 3/6/0001 <input type="checkbox"/>				
		Target Completion Date <input type="text"/>				
<u>Labor Summary</u>						
<u>Labor Category</u>	<u>(h:m)</u> <u>Hours</u>	<u>(hourly)</u> <u>Rate</u>	<u>Phase 1</u> <u>Prewire</u>	<u>Phase 2</u> <u>Trim</u>	<u>Phase 3</u> <u>Final</u>	<u>Total</u>
1 - Installation	10:20	\$60.00	\$60.00	\$60.00	\$500.00	\$620.00
2 - Programming	2:00	\$80.00			\$160.00	\$160.00
3 - Training	3:10	\$100.00			\$316.67	\$316.67
4 - Parts Labor	1:30	\$50.00		\$25.00	\$50.00	\$75.00
5 - Wire Labor - Bulk	12:40	\$60.00	\$750.00		\$10.00	\$760.00
6 - Wire Labor - Precut	1:00	\$60.00			\$60.00	\$60.00
Misc Services Labor Total:						\$1,200.00
Total Amount			\$810.00	\$85.00	\$1,096.67	\$3,191.67
(h:m) Total Hours			13:30	1:30	15:40	30:40

Approvals Required		
Required prior to submitting proposal to client		
Print SCPS Proposal, Labor and Wire Summary for Proj Mgr & Manager Approval		
Project Manager	Jon Oster	
Project Manager Approval & Date	<input type="text"/>	Required for Level 2 & 3
Manager Approval & Date	<input type="text"/>	Required for Level 2 & 3
Engineering Approval & Date	<input type="text"/>	Required for Level 3 - Engineering Documentation Required
Programming Approval & Date	<input type="text"/>	Required for Level 3 - Programming Documentation Required

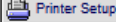
Documents to Submit to Administration		Engineering Documentation																							
<input checked="" type="checkbox"/> This Approval Form and Package <input checked="" type="checkbox"/> SCPS Areas & Products <input checked="" type="checkbox"/> SCPS Product Summary <input checked="" type="checkbox"/> SCPS Parts & Wire Summaries <input checked="" type="checkbox"/> SCPS Fees & Services <input checked="" type="checkbox"/> Signed Contract <input checked="" type="checkbox"/> Deposit per Contract <input checked="" type="checkbox"/> Review Special and/or Rush Items w/ Purchasing <input checked="" type="checkbox"/> Notes on Special Parts Pricing or Details	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;"></th> <th style="width: 20%; text-align: center; color: blue; font-size: small;">Need By Date</th> </tr> </thead> <tbody> <tr><td>Line Drawing</td><td><input type="text"/></td></tr> <tr><td>Connectivity Drawing</td><td><input type="text"/></td></tr> <tr><td>Rack Detail</td><td><input type="text"/></td></tr> <tr><td>Screen Quote</td><td><input type="text"/></td></tr> <tr><td>Projector Specification</td><td><input type="text"/></td></tr> <tr><td>Lighting Design</td><td><input type="text"/></td></tr> <tr><td>Shade Design</td><td><input type="text"/></td></tr> <tr><td>Heating/Cooling</td><td><input type="text"/></td></tr> <tr><td>Electrical Requirements</td><td><input type="text"/></td></tr> <tr><td>Product Dimensions</td><td><input type="text"/></td></tr> <tr><td>Product Changes after Engineering</td><td><input type="text"/></td></tr> </tbody> </table>		Need By Date	Line Drawing	<input type="text"/>	Connectivity Drawing	<input type="text"/>	Rack Detail	<input type="text"/>	Screen Quote	<input type="text"/>	Projector Specification	<input type="text"/>	Lighting Design	<input type="text"/>	Shade Design	<input type="text"/>	Heating/Cooling	<input type="text"/>	Electrical Requirements	<input type="text"/>	Product Dimensions	<input type="text"/>	Product Changes after Engineering	<input type="text"/>
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Product Changes after Engineering	<input type="text"/>																								




Project WO Install Notes - Special Parts Pricing or Details
<div style="border: 1px solid black; margin-bottom: 5px; padding: 2px;">Notes</div> <div style="border: 1px solid black; height: 140px;"></div>

Enhancement – Print Approval Form - Approval Package

You can access or Print the Approval Form or the Approval Package from the Proposal – Project Detail, the Approval Form screen or the Print Menu/Shop Menu. The Approval Package Prints these Reports in this order in one Package:

1. Approval Form
2. Areas and Products with pricing and no pictures
3. Product Summary with no pricing and no pictures
4. Fees and Services with all selected fees and pricing
5. Parts Summary with pricing
6. Wire Summary with pricing

4 **Proposal - Project Approval** 

White fields can be modified on this screen. **Mike & Jessica Potter**   

Green fields are modified on the Client/Project screens. **Security System**
1282.1-1.100

Project Information Required

Sales Specialist Jim Engandela Salesman's # 100 RCMS Acct # Percentage of Job %

Client Address **Billing Client** Same if blank **Phone Numbers**

Mike & Jessica Potter
567 58TH Street
Oakland, CA 94607

Home Phone 715-830-5022 Ext
Work Phone Ext
Cell Phone




Client Referred By ☐ Trade Contacts are entered in SCPS





Installation & Payment Type **Project Level:** ☐ Level 1 **Project Type:** ☐ Standard
New-3 Phase Pre-Trim-Final ☐ Level 2 ☐ Fast Track
☐ Level 3

Install Phase Dates **Start Dates** **Real Date**


1 - Prewire ☐
2 - Trim 2/1/0001 ☐
3 - Final 3/6/0001 ☐
Target Completion Date

All estimated scheduling dates are to be confirmed by Project Management and are subject to change based on project status.






 **Proposal - Print Menu - Shop**  

PDF reDirect Pro v2,winspool,Ne01: **Mike & Jessica Potter**    

Security System
1282.1-1.100




Proposals **Shop** **Custom** 






Job Costing **Installation Utilities** **Project Info**

 Project Pricing
 Master Project Pricing
 Payment Terms
 Payments & Balances Summary
Subtotal Costing
 Subtotal by Discipline

Select Phases ☒ 1 Prewire
☒ 2 Trim
☒ 3 Final

Staging by Make-Model (Total Qty)

 Product Staging
 Part Staging
 Wire Staging

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

Enhancement – Proposal/Project/Approval Form: Project Fees Listing Print/Preview

A button for previewing and printing the Project Fees Listing report is on the Project Approval screen and on the Shop/Print Menu. This report is included in the Approval Package as well.

Project Information Required Printer Setup

Green fields are modified on the Client/Project screens.

Proposal - Project Approval

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

Project Fees Listing with Fees directed to Labor & Parts

Approval Form Approval Package

Done

Sales Specialist Jim Engandela Salesman's # 100 RCMS Acct # Percentage of Job %

Client Address

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

Billing Client Same if blank

Tom & Kelly & Family Burkes
Sunbelt Business Brokers
567 58TH Street
Oakland, CA 94607

Phone Numbers

Home Phone Ext
Work Phone 715-287-3335 Ext
Cell Phone

Client Referred By

Jim Ristow

Installation & Payment Type Project Level: Project Type:

New-3 Phase Pre-Trim-Final ☐ Level 1 ☐ Standard

☐ Level 2 ☐ Fast Track

☐ Level 3

☐ Trade Contacts are entered in SCPS

Install Phase Dates Start Dates Real Date ?

1 - Prewire ☐

2 - Trim 2/1/0001 ☐

3 - Final 3/6/0001 ☐

Target Completion Date

All estimated scheduling dates are to be confirmed by Project Management and are subject to change based on project status.

Labor Summary

Labor Category	(h:m) Hours	(hourly) Rate	Phase 1	Phase 2	Phase 3	Total
			Prewire	Trim	Final	
1 - Installation	31:10	\$60.00	\$350.00	\$415.00	\$1,105.00	\$1,870.00
2 - Programming	7:00	\$80.00		\$560.00	\$560.00	\$560.00
3 - Training	7:05	\$100.00		\$500.00	\$208.33	\$708.33
4 - Parts Labor	4:45	\$50.00		\$87.50	\$150.00	\$237.50
5 - Wire Labor - Bulk	22:55	\$60.00	\$1,350.00		\$25.00	\$1,375.00
6 - Wire Labor - Precut	2:05	\$60.00			\$125.00	\$125.00
Total Amount			\$1,700.00	\$1,002.50	\$2,173.33	\$4,875.83
(h:m) Total Hours			28:20	13:40	33:00	75:00

Enhancement – Proposal Print Menu & Approval Form: Paste File Name

When Printing any report to a PDF from the Proposal, Shop or Approval Form you can now place your cursor in the File Name field and press Control & V on your keyboard to paste the Proposal number and Client Name into the field. This is automatic when entering the Print Menu or Approval form or you can click on this icon to copy the Proposal number and Client name into memory.

Proposal - Print Menu Refresh Reports ? Home

PDF reDirect Pro v2, winspool, Ne01: LeRoy Asher Send Email

Home Entertainment System Client Manager

1298.1-1.100 Salesman Engineer

Done Preferences Print Options

Proposals **Shop** **Custom**

Main Proposal User Print

Print All Sections Sound Com

Proposal Section

Cover Page

Client Intro

Message

The Project Name & Number can be Pasted into the PDF File Name field, by placing the cursor in that field and pressing Control & V. Click this icon before printing.

OK

Proposal & Supplements

Parts, Wire & Labor

Discipline

Products & Only Labor

Products & Supplements without Prices

PDF Output Filename v2.5.2

☒ View in PDF Reader after saving

Filename

View Style 100% Zoom (Def)

Startup Page ☐ Fast Web View

Enhancement – Proposal & Project/Utility/Admin: Changing Proposal Number

When changing a Proposal or Project Number. The Highest Proposal Number in SCPS is now displayed on this screen. If you change the current Proposal number to a number higher than the Master Preferences Proposal Counter, that number is automatically reset. This insures that duplicate numbers will not be created when a new Proposal is created. A new Done button controls this process.

1294 **Proposal Utility - Administration** ?

Neil & Gerri Werle

Home Theater System
1281.1-1.100

Change Proposal Number

This utility should be used with discretion.

This administration utility enables you to change the proposal numbers on existing proposals.

Proposal numbers do not have to be unique to function properly.

New Proposal Numbers should be higher than the highest current number.

Current Highest Proposal Number	Proposal Number	Proposal Version	Store Location	User Number
1293	<input type="text" value="1281"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="100"/>

Enhancement – Master Prefs/Other/Counters: Counter Trap

A new Done button checks all Counters to ensure that they are equal to or greater than the current highest numbers in SCPS. You will not be able to leave this screen if that condition exists.

Master Prefs - Other - Counters ?

Counters

Proposals	<input type="text" value="1293"/>	1293 is the highest proposal number so far
Purchase Orders	<input type="text" value="1082"/>	1081 is the highest purchase order number so far
Work Orders	<input type="text" value="2007"/>	2007 is the highest work order number so far
Sales Invoices	<input type="text" value="3015"/>	3014 is the highest sales invoice number so far
POS Invoices	<input type="text" value="7197"/>	7196 is the highest POS invoice number so far

Numbers must be greater than 999

Enhancement – Master Prefs/Other/Counters: User Definable Log in Auto Exit

You can now change the Log in screen auto exit time in the Master Prefs/Other/Counters screen. If this field is empty the default exit time is 2 minutes. Users can set it to a maximum of 5 minutes

Master Prefs - Other - Counters						?	Home
Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters		
Proposal 2	Projects 2	Products 2	Misc 2	3rd Party 2	Graphics	Done	
<div><div>Counters</div><div><div>Proposals</div><div>1290</div><div>1290 is the highest proposal number so far</div></div><div><div>Purchase Orders</div><div>1082</div><div>1081 is the highest purchase order number so far</div></div><div><div>Work Orders</div><div>2007</div><div>2007 is the highest work order number so far</div></div><div><div>Sales Invoices</div><div>3015</div><div>3014 is the highest sales invoice number so far</div></div><div><div>POS Invoices</div><div>7197</div><div>7196 is the highest POS invoice number so far</div></div><div>Numbers must be greater than 999</div></div> <div><div>Login Timer</div><div><div>Log in Exit Time</div><div>0:02:00</div><div>SCPS will exit automatically if left at the log in screen. Default if Empty = Exit in 2 Minutes Auto exiting SCPS prevents users from sitting at the Log in screen and tying up a User License.</div></div></div>							

Enhancement – Proposal & Project: Posting Totals when entering a Proposal or Project

We are now running 2 posting routines when entering a Proposal or Project. This ensures that the Totals will be refreshed if other users have made changes to a given Proposal or Project.

Enhancement – Proposal/Overviews & Print Menu/Preferences: Custom Reports Bullet Points

Bang & Olufsen users can now access the Bullet Point module from the Overviews and Print Menu/Preferences screens

Proposal - Overviews		?	Home
Mr. & Mrs. Lee Christenson North American Fly LTD Home Entertainment System 1289.1-1.100		Done	
		Custom Reports Bullet Points	
Master Overviews		Proposal Overviews	
<div>Add to Proposal Sort Overview Title</div> <div>a Linn Products</div>		<div>New Overview for this Proposal</div> <div>View Sort Overview Title Remove from Proposal</div> <div>a Linn Products</div>	

<div> ABC Spell Reset to Master Prefs </div>			Proposal/Preferences - Cover Page		<div> ? Home </div>
<div> <div>Cover Page</div> <div>Client Intro</div> <div>Shop Intro</div> </div>	<div> <div>Fees</div> <div>Extra Pages</div> </div>	<div> <div>Contracts</div> <div>Terms</div> <div>Pricing</div> </div>	<div> <div>Mr. & Mrs. Lee Christenson</div> <div>North American Fly LTD</div> <div>Home Entertainment System</div> <div>1289.1-1.100</div> </div>		<div> <div>Print Menu</div> <div>Print Options</div> </div>
			<div> <div>Custom Reports</div> <div>Bullet Points</div> </div>		
<div> <div>Shop Tag Line ></div> </div>			<div> <div> <div>EME</div> <div>audio & video</div> </div> <div> <div>The Quality Name in Sound and Service</div> </div> </div>		

Fix – Product Library/Product Detail: Loading Calculator Sell Price by Margin

The Loaded Sell Price is now calculated based on the Loaded Cost instead of the Net Cost. If you set the Adjustment Type to “Sell Margin = %” and put in a % , the Loaded Sell Price will be that % of the Loaded Cost.

Unit	ea	Net Price	Loading Calculator		Update	Loaded Price
List			Adjustment Type	%		
Sell			Sell Margin = %	40.0		Sell \$18.33
Minimum Sell			GP	%	\$	GP 40.0%
Net Cost		\$10.00	Net Cost + %	10.0		Cost \$11.00

Fix – Contact/Entities: Go to correct Entity

When you click on the View button on an Entity in the Proposal – Project- Change Order portal you now go directly to that specific Entity and not the first one in the list.

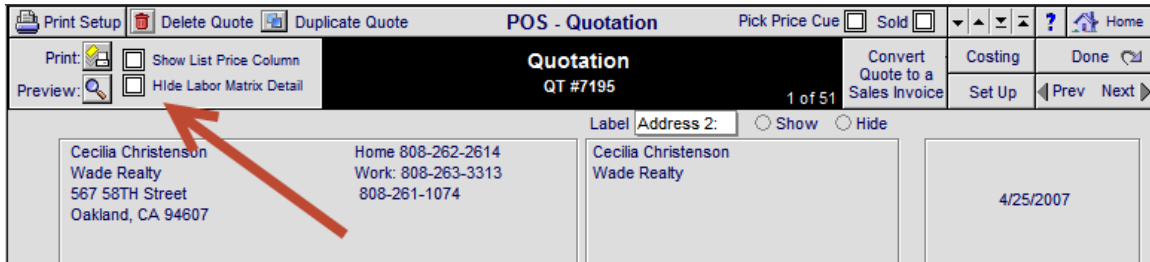
Contacts - Entities						<div> ? Home </div>
<div> <div>LeRoy Asher</div> <div>Entity Defaults</div> </div>						<div> <div>New Proposal</div> <div>New POS</div> <div>New Task</div> </div>
<div> <div>Detail</div> <div>Info</div> <div>Com Log</div> <div>Entities</div> <div>Files & Pix</div> <div>Transactions</div> </div>						<div> <div>Done</div> <div>Prev Next</div> <div>1 of 134</div> </div>
Proposal - Projects - Change Orders - Completed Projects - Archived Proposals						
View	Entity Kind	Number User	Title	Created	Total	
Q	Master Project	1296.1-1.100	Home Entertainment System	8/30/2012	\$4,407.88	
Q	Pending CO	1296.1c1-1.100	Home Entertainment System			
Q	Proposal	1298.1-1.100	Home Entertainment System	11/15/2012	\$7,871.00	

Fix – Product Library/Line List: Do not Show Hidden items when entering the Product Library

The routine that checks to see if Products do not have a Discipline has been removed from the go to Line List process. This speeds things up. It still runs when leaving the product library to ensure that products have a Discipline. This routine also runs directly after the RCMS Import process.

Fix – POS/All Invoices: Hide Labor Detail Matrix

The checkbox to Hide the Labor Detail Matrix on the Printed Invoices has been fixed. If checked the Matrix will not show. The Setup screen for each kind of Invoice has also been changed with the checkbox instead of a pop up “Show/Don’t Show” field.



POS - Quotation

Print: ☐ Show List Price Column

Preview: ☐ Hide Labor Matrix Detail

Quotation
QT #7195
1 of 51

Convert Quote to a Sales Invoice

Costing

Done

Set Up

Prev Next

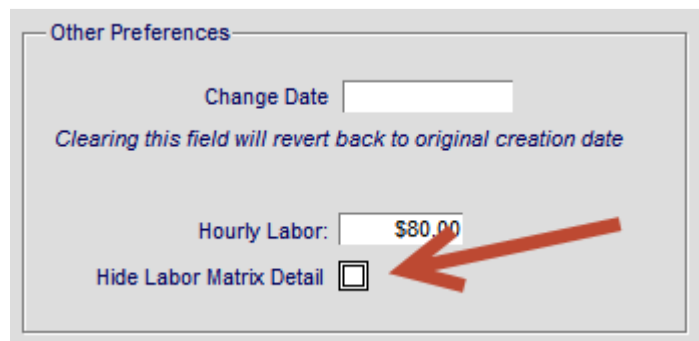
Label Address 2: ☐ Show ☐ Hide

Cecilia Christenson
Wade Realty
567 58TH Street
Oakland, CA 94607

Home 808-262-2614
Work: 808-263-3313
808-261-1074

Cecilia Christenson
Wade Realty

4/25/2007



Other Preferences

Change Date

Clearing this field will revert back to original creation date

Hourly Labor:

Hide Labor Matrix Detail ☐

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

Line Items:	1,550.00
Labor:	40.00
Other:	
Subtotal:	1,590.00
Tax:	85.25
Freight:	
Total:	1,675.25

Line Items:	1,550.00
Labor:	40.00
Other:	
Subtotal:	1,590.00
Tax:	85.25
Freight:	
Total:	1,675.25

Fix – New Proposal/Pick Contact/Cancel: Cancel button returns to Proposal

If you choose not to Pick or Add a new Contact when creating a New Proposal, the Cancel button now properly takes you back to the New Proposal.

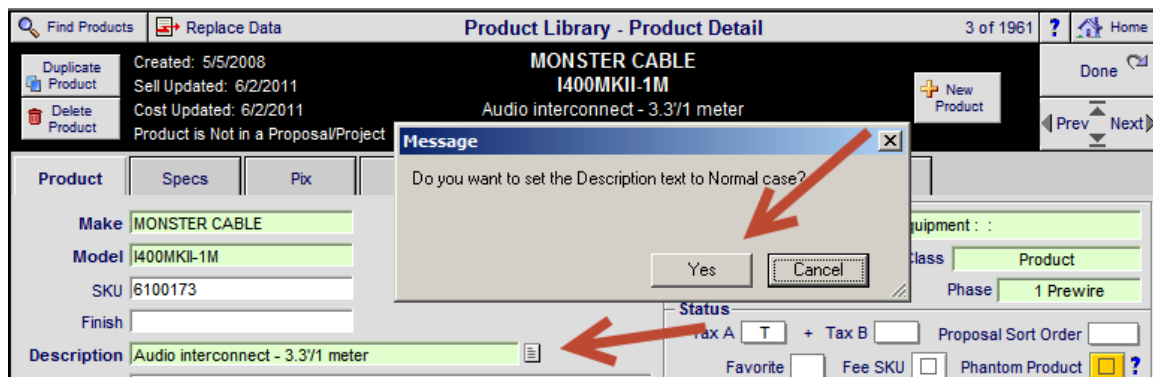


The screenshot shows the 'Contact Manager' window with a search bar and a list of contacts. A dialog box titled 'Pick or Add a New Contact' is open, showing '23 of 23 Contacts'. A red arrow points to the 'Cancel' button in the dialog box.

Pick Contact	Name	Company	Category	Phone	Info	View	Fav
	Back, Eileen		Client	(H) 608-989-2387			
	Bashir, Sikandar		Client	(M) 612-817-2242			
	Berkow, Dana		Client	(H) 650-591-2996			
	Burkes, Tom & Kelly & Family	Sunbelt Business Brokers	Client	(W) 831-624-5600			

Enhancement – Product Library/Product Detail: Set Description to normal case

Clicking the icon next to the description field will convert the description next to normal case.

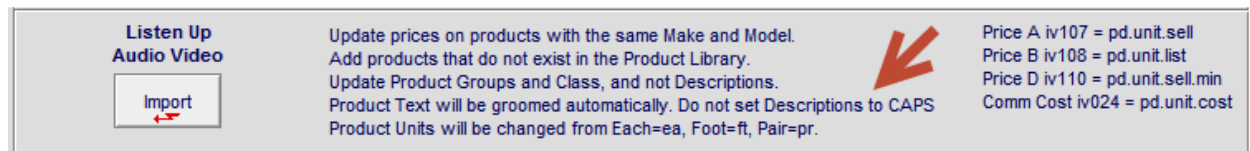


The screenshot shows the 'Product Library - Product Detail' window for 'MONSTER CABLE I400MKII-1M'. A message dialog box is open, asking 'Do you want to set the Description text to Normal case?'. A red arrow points to the 'Yes' button in the dialog box.

Product: MONSTER CABLE
Model: I400MKII-1M
SKU: 6100173
Description: Audio interconnect - 3.3/1 meter

Enhancement – Product Library/Utility: RCMS Import – Do not set Descriptions to CAP

Products imported into SCPS from RCMS will not have their Descriptions updated or converted to CAPS. If the descriptions are customized by Listen Up they will not be overwritten during the next RCMS Import.



The screenshot shows the 'Listen Up Audio Video' import dialog box. It contains instructions for importing products and a red arrow pointing to the 'Import' button.

Listen Up Audio Video

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, and not Descriptions.
Product Text will be groomed automatically. Do not set Descriptions to CAPS
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

SCPS Version 9.7v1

Released: 11/1/2012

Enhancement – Proposal/Pricing Screen: Labor Summary

The new Labor Summary Matrix, including Fees directed to Labor, is now displayed on the Proposal & Project Pricing screen.

Client Mode ☐

Proposal - Pricing
Print
?
Home

Hayes Callahan
Done

Pricing
Labor Rates
Commissions

Tax Summary
Product Tax
Fees Tax

Home Theater System
1283.1-1.100

Excluded Products Total
Labor Meter

Proposal - Pricing
Show List Price & Discount ☒ yes ☐ no
Show Sales Tax ☒ yes ☐ no

	Subtotals	Sell	GP%	Cost	Profit	Discount	Total Labor Time
Equipment		\$22,909.95	40.2%	\$13,706.40	\$9,203.55	-\$100.00	15:20:00
Installation		\$995.83	45.9%	\$538.33	\$457.50		
Misc. Parts		\$200.00	40.5%	\$119.00	\$81.00		
Wire & Cable		\$3,041.20	41.2%	\$1,788.72	\$1,252.48		
Additional Fees		\$2,006.61	50.0%	\$1,003.30	\$1,003.30		
Total		\$29,153.59	41.2%	\$17,155.76	\$11,997.83		
Tax		\$1,493.08					
Grand Total		\$30,646.68					

\$29,253.59 List Price
-\$100.00 Courtesy Discount
\$29,153.59 Total

Labor Summary

Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	5:10	\$60.00	\$30.00	\$30.00	\$250.00	\$310.00
2 - Programming	1:00	\$80.00			\$80.00	\$80.00
3 - Training	1:35	\$100.00			\$158.33	\$158.33
4 - Parts Labor	0:45	\$50.00		\$12.50	\$25.00	\$37.50
5 - Wire Labor - Bulk	6:20	\$60.00	\$375.00		\$5.00	\$380.00
6 - Wire Labor - Precut	0:30	\$60.00			\$30.00	\$30.00
Total Amount			\$405.00	\$42.50	\$548.33	\$995.83
(h:m) Total Hours			6:45	0:45	7:50	15:20

Proposal Equipment - Price Adjuster

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

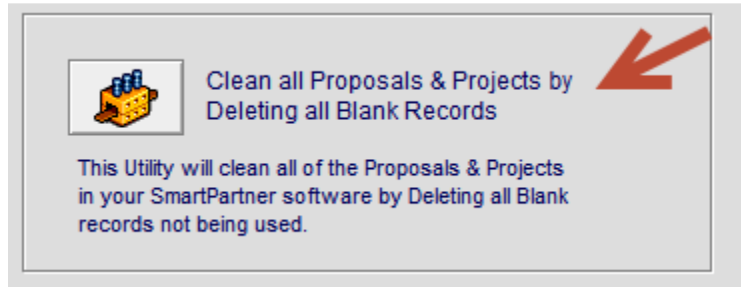
Adjustment Type:
Set All Prices to Adjustment

Percentage %: %
Set Sell Price Adjustment based on \$ Amount

Price Adjustments will be applied to all selected Equipment in this Proposal except those products that are checked "Do Not Discount" or "No Disc't"
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.

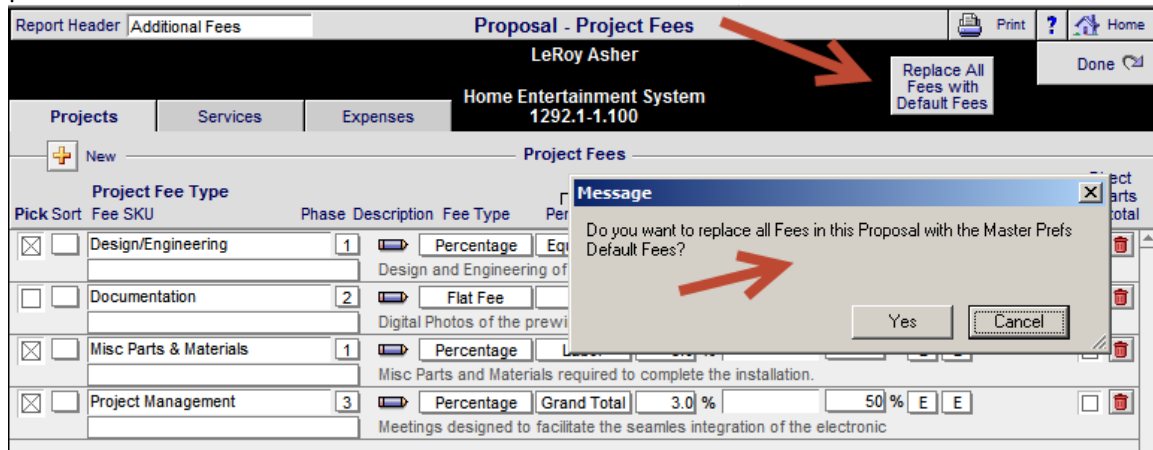
Enhancement – Main Screen/Utility: Clean all Proposal & Project Blank Records

Occasionally blank Product records can be created in a Proposal, if the Pick Product Process is interrupted. This utility will clean all of your Proposals and Projects of these blank and unwanted Product Records.



Enhancement – Proposal/Fees: Replace all Fees with Master Prefs Fees - Utility


In a Proposal or Pending Change Order you can now replace all of the Project, Services and Expense Fees with the Master Prefs Default Fees.



Enhancement – Proposal/Print Menu/Product Summary Report: Tweak for better PDF's

The Product Summary Report now has a tweak that makes it easier for PDF programs to create PDF's without dropouts.

Home Theater System
for Hayes Callahan


B&B
SOUND SYSTEMS




Product Summary

Audio

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

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

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

Enhancement – Proposal/Print Menu: Eagle 1 and Eagle 2 Custom Print Cues

A new Print Cue for Eagle Sentry labeled Eagle 1 has been added. This Print Cue Prints the Cover Page, the Client Intro page, the Areas & Products section without Area Totals and the Contract. A new Print Cue for Eagle Sentry labeled Eagle 2 has been added. This Print Cue Prints the Cover Page, the Client Intro page, the Areas & Products section with Area Totals and the Contract.

Proposal - Print Menu

PDF reDirect Pro v2, winspool, Ne01: Hayes Callahan

Home Theater System
1283.1-1.100

Send Email
☐ Client ☐ Manager
☐ Salesman ☐ Engineer

Done Preferences Print Options

Main Proposal

Print All Sections User Print Cue Eagle 1

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
☐ Show 2nd Address
Extra Text

Proposal Summaries

Print All
Proposal Summary
Discipline

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
Fees Directed to Labor
Parts Summary
Parts Detail List
Fees Directed to Parts
Wire & Cable Summary
Wire & Cable Detail List

Print Status

Shop Location: Bang & Olufsen Standard
Contract: 1 - Contract 1
Product Listing Option: A1 Make-Model-Description-Finish
Product Pricing Option: Product : Ext Sell
Subtotal Pricing Option: 5 Subtotals
Printer Name: PDF reDirect Pro v2, winspool, Ne01:

Proposal Status
User Print Cue: Eagle 1
Report Date: 10/2/2012 ☐ Date Lock
☐ Show Print Dialog when printing
☐ Custom Proposal Layouts

Enhancement – Project/Project: Project Approval Form screen and report

In a Project, on the Project screen is a new Project Approval button that enables you to input data and Print the Approval Form.

Project - Project Info

Mr. & Mrs. Lee Christenson
North American Fly LTD
Home Entertainment System
1289.1-1.100

Client Project
Info Contacts Notes

Print Done
Project Approval

Project - Project Approval						?
White fields are modified on this screen. Green fields are modified on the Client/Project screens.		Mr. & Mrs. Lee Christenson North American Fly LTD Home Entertainment System 1289.1-1.100		<div style="border: 1px solid black; padding: 2px; display: inline-block;"> Print Approval Form </div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;"> Done </div>		
Project Information Required						
Sales Specialist Jim Engandela		Salesman's # 100		RCMS Acct #		Percentage of Job <input type="text" value="100"/> %
Client Address		Billing Client <small>Same if blank</small>		Phone Numbers		
Mr. & Mrs. Christenson North American Fly LTD 567 58TH Street Oakland, CA 94607		Jim Engandela Horizon Software S. 15700 Hwy U. Strum WI 54770		Home Phone <input type="text" value="715-287-4557"/> Ext <input type="text"/> Work Phone <input type="text" value="715-695-3533"/> Ext <input type="text"/> Cell Phone <input type="text" value="715-797-3533"/>		
Client Referred By		<input type="checkbox"/> Trade Contacts are entered in SCPS				
Installation & Payment Type			Project Level:		Project Type:	
<input type="text" value="New-3 Phase Pre-Trim-Final"/>			<input type="checkbox"/> Level 1 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 3		<input type="checkbox"/> Standard <input type="checkbox"/> Fast Track	
Install Phase Dates		Start Dates		? Real Date		
1 - Prewire		<input type="text" value="11/27/2012"/>		<input type="checkbox"/>		
2 - Trim		<input type="text" value="12/27/2012"/>		<input type="checkbox"/>		
3 - Final		<input type="text" value="1/26/2013"/>		<input type="checkbox"/>		
Target Completion Date		<input type="text" value="4/26/2013"/>		All estimated scheduling dates are to be confirmed by Project Management and are subject to change based on project status.		
Labor Summary						
Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	2:00	\$60.00		\$60.00	\$60.00	\$120.00
2 - Programming	2:00	\$80.00			\$160.00	\$160.00
3 - Training	11:00	\$100.00		\$1,000.00	\$100.00	\$1,100.00
4 - Parts Labor	2:00	\$50.00		\$25.00	\$75.00	\$100.00
5 - Wire Labor - Bulk	6:15	\$60.00	\$375.00			\$375.00
6 - Wire Labor - Precut	0:35	\$60.00			\$35.00	\$35.00
Misc Services Labor Total:						\$500.00
Total Amount			\$375.00	\$1,085.00	\$430.00	\$2,390.00
(h:m) Total Hours	23:50		6:15	11:30	6:05	

Approvals Required

Required prior to submitting proposal to client

Print SCPS Proposal, Labor and Wire Summary for Proj Mgr & Manager Approval

Project Manager Sandy Engandela

Project Manager Approval & Date Required for Level 2 & 3

Manager Approval & Date Required for Level 2 & 3

Engineering Approval & Date Required for Level 3 - Engineering Documentation Required

Programming Approval & Date Required for Level 3 - Programming Documentation Required

Documents to Submit to Administration

Engineering Documentation

Need By

<input type="checkbox"/> This Cover Page	Line Drawing	<input type="text"/>
<input type="checkbox"/> Signed Contract	Connectivity Drawing	<input type="text"/>
<input type="checkbox"/> SCPS Fees & Services	Rack Detail	<input type="text"/>
<input type="checkbox"/> SCPS Areas & Products	Screen Quote	<input type="text"/>
<input type="checkbox"/> Deposit	Projector Specification	<input type="text"/>
<input type="checkbox"/> SCPS Product Summary	Lighting Design	<input type="text"/>
<input type="checkbox"/> Review Special and/or Rush Items w/ Purchasing	Shade Design	<input type="text"/>
<input type="checkbox"/> Quotes/Details	Heating/Cooling	<input type="text"/>
	Electrical Requirements	<input type="text"/>
	Product Dimensions	<input type="text"/>
	Product Changes after Engineering	<input type="text"/>

Project WO Install Notes

10/29/2012

**Store Report
Project Approval Form**

Page 1

**Project
Information
Required**

**Mr. & Mrs. Lee Christenson
North American Fly LTD
Home Entertainment System
1289.1-1.100**

Sales Specialist Jim Engandela
RCMS Acct #

Salesman's # 100
Percentage of Job % 100

Client Address**Billing Client** Same if blank**Phone Numbers**

Mr. & Mrs. Christenson
North American Fly LTD
567 58TH Street
Oakland, CA 94607

Jim
Engandela
Horizon Software
S. 15700 Hwy U.

Strum
WI 54770

Home Phone
715-287-4557

Work Phone
715-695-3533

Cell Phone
715-797-3533

Client Referred By
☐ **Trade Contacts are entered in SCPS**
Installation & Payment Type

New-3 Phase Pre-Trim-Final

Project Level: ☐ Level 1☐ Level 2☐ Level 3**Project Type:** ☐ Standard☐ Fast Track**Install Phase Dates****Start Dates****Real
Date**

1 - Prewire 11/27/2012

2 - Trim 12/27/2012

3 - Final 1/26/2013

Target Completion Date 4/26/2013

☐ All estimated scheduling dates are to
be confirmed by Project Management
and are subject to change based on
project status.

Labor Summary

Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	2:00	\$60.00		\$60.00	\$60.00	\$120.00
2 - Programming	2:00	\$80.00			\$160.00	\$160.00
3 - Training	11:00	\$100.00		\$1,000.00	\$100.00	\$1,100.00
4 - Parts Labor	2:00	\$50.00		\$25.00	\$75.00	\$100.00
5 - Wire Labor - Bulk	6:15	\$60.00	\$375.00			\$375.00
6 - Wire Labor - Precut	0:35	\$60.00			\$35.00	\$35.00
Misc Services Labor Total:						\$500.00
Total Amount			\$375.00	\$1,085.00	\$430.00	\$2,390.00
(h:m) Total Hours			23:50	6:15	11:30	6:05

Store Report
Project Approval Form

Page 2

Mr. & Mrs. Lee Christenson
North American Fly LTD
Home Entertainment System
1289.1-1.100

Approvals Required

Required prior to submitting proposal to client

Print SCPS Proposal, Labor and Wire Summary for Proj Mgr & Manager Approval

Project Manager Sandy Engandela

Project Manager Approval & Date	<input type="text"/>	Required for Level 2 & 3
Manager Approval & Date	<input type="text"/>	Required for Level 2 & 3
Engineering Approval & Date	<input type="text"/>	Required for Level 3 - Engineering Documentation Required
Programming Approval & Date	<input type="text"/>	Required for Level 3 - Programming Documentation Required

Documents to Submit to Administration

Engineering Documentation

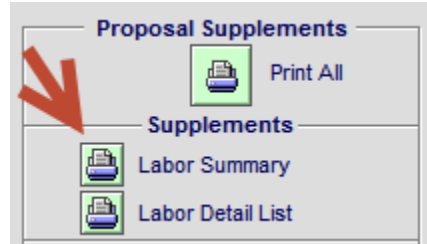
Need By

<input type="checkbox"/> This Cover Page	Line Drawing	<input type="text"/>
<input type="checkbox"/> Signed Contract	Connectivity Drawing	<input type="text"/>
<input type="checkbox"/> SCPS Fees & Services	Rack Detail	<input type="text"/>
<input type="checkbox"/> SCPS Areas & Products	Screen Quote	<input type="text"/>
<input type="checkbox"/> Deposit	Projector Specification	<input type="text"/>
<input type="checkbox"/> SCPS Product Summary	Lighting Design	<input type="text"/>
<input type="checkbox"/> Review Special and/or Rush Items w/ Purchasing	Shade Design	<input type="text"/>
<input type="checkbox"/> Quotes/Details	Heating/Cooling	<input type="text"/>
	Electrical Requirements	<input type="text"/>
	Product Dimensions	<input type="text"/>
	Product Changes after Engineering	<input type="text"/>

Project WO Install Notes

Enhancement – Project Fees: Labor & Parts Fees - Labor & Parts Summary Report

Fee Amounts Directed to Parts & Labor Subtotals now show on the Labor Summary & Detail and the Parts Summary & Detail Reports.



Home Entertainment System
for Mr. & Mrs. Christenson North American Fly LTD



Labor Summary


Labor Time by Phase (Hrs:Min:Sec)				
Labor Category	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation		3:50:00		3:50:00
2 - Programming				
3 - Training				
4 - Parts Labor	1:30:00		0:15:00	1:45:00
5 - Wire Labor - Bulk				
6 - Wire Labor - Precut				
Total (Hrs:Min:Sec)	1:30:00	3:50:00	0:15:00	5:35:00


Labor Amount by Phase				
Labor Category	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation		\$306.67		\$306.67
2 - Programming				
3 - Training				
4 - Parts Labor	\$90.00		\$15.00	\$105.00
5 - Wire Labor - Bulk				
6 - Wire Labor - Precut				
Misc Service Labor Total:				\$1,325.00
Total Amount	\$90.00	\$306.67	\$15.00	\$1,736.67

Proposal Supplements

 Print All

Supplements

 Labor Summary

 Labor Detail List


**Home Entertainment System
for Mr. & Mrs. Christenson North American Fly LTD**




Labor Detail


Discipline Labor Type	Qty	Make - Model	Area Labor Notes	Install Phases	Install h:m:s	Hourly Rate	Sell Ext
Installation	1	AT & T : 249	Breakfast Room	2	3:55:00	\$80.00	\$306.67
Equipment							
Parts Labor	1	AT & T : 249	Breakfast Room	1,3	1:45:00	\$60.00	\$105.00
Equipment							
Misc Service Labor Total:							\$1,325.00
Labor Time (h:m:s)					5:35:00	Total	\$1,736.67


Proposal Supplements


 Print All

Supplements

 Labor Summary

 Labor Detail List

 Parts Summary

 Parts Detail List


**Home Entertainment System
for Mr. & Mrs. Christenson North American Fly LTD**




Supplemental Parts Summary


Make - Model	Description	Total Qty	Unit Price	Ext Price
Linn : Aktiv Modules	Stereo or twin mono	1	\$255.00	\$255.00
Misc Project Parts Total:				\$77.55
Total				\$250.00


Proposal Supplements



Print All

Supplements


Labor Summary


Labor Detail List


Parts Summary



Parts Detail List

Home Entertainment System
for Mr. & Mrs. Christenson North American Fly LTD





Supplemental Parts					
Part	Assigned to Make - Model	Zone - Area	Qty	Unit Price	Ext Price
Part: Linn - Aktiv Modules - Stereo or twin mono Aktive			1 ea	\$255.00	\$255.00
At & T : 249		Breakfast Room			
Misc Project Parts Total:					\$77.55
Total Parts:					\$250.00


Proposal Supplements



Print All


Supplements



Labor Summary



Labor Detail List



Parts Summary


Parts Detail List


Wire & Cable Summary


Wire & Cable Detail List


Fees - Directed to Parts


Fees - Directed to Labor


**Home Entertainment System
for Mr. & Mrs. Christenson North American Fly LTD**




Fees Directed to Parts


Fee	Ext Price
Fee Description	
Documentation Digital Photos of the prewire and final installation taken, cataloged and stored on the our server. Detailed photos of significant details of the installation that would be important for future servicing of the system. As Built one line wiring diagrams detailing connection points, splice points and wiring color coding. List of the serial numbers of components installed. Owners manual packet of all product owners manuals. CD ROM with electronic versions of these items.	\$25.00
Project Management Meetings designed to facilitate the seamless integration of the electronic systems with the home. These meetings may be with the Architect, Interior Designer, Contractor, Electrician, Cabinet Maker and other related companies. Verification of project progress so that we may schedule ordering of materials, products, programming and installation as needed to insure work needed on the electronic systems dovetail at the appropriate times with the project schedule. Project site visits to resolve questions or conflicts of the electronic systems with other items in the home. Project quality control checks at the prewire, cabinet installation and final installation to insure systems are delivered as intended by the system design document.	\$52.55
Total Parts Directed Fees	
	\$77.55


Proposal Supplements


 [Print All](#)


Supplements


 [Labor Summary](#)


 [Labor Detail List](#)


 [Parts Summary](#)

 [Parts Detail List](#)

 [Wire & Cable Summary](#)

 [Wire & Cable Detail List](#)

 [Fees - Directed to Parts](#)

 [Fees - Directed to Labor](#)

**Home Entertainment System
for Mr. & Mrs. Christenson North American Fly LTD**



Fees Directed to Labor			
Fee Fee Description	Qty	Unit Price	Ext Price
Audio Distribution Diagram Audio Distribution Diagram text With such an important decision it is wise to listen to the best sound systems available before you make your choice and decide what you wish to buy. Whether you simply want to select a stand-alone hi-fi or define a full home theatre sound system or when you want to enjoy the best sound in integrated multi-media entertainment throughout your home, it makes sense to contact Linn and allow us to help you by arranging a demonstration. Because thrilled customers have built our business, you can be sure that you can depend upon the people that Linn recommend to look after you.	2	\$15.00	\$30.00
1-Way PHAST Package Control System Design for systems that meet the following criteria: Control of a Single Room System, utilizing one of Definitive's touchpanel Design Templates, One Display Device, No Feedback Required	1	\$1,295.00	\$1,295.00
Total Labor Directed Fees:			\$1,325.00

Enhancement – Project/PO: Client Last Name Option

Selecting the Show Client Name option in a Project PO now only shows the Clients Last name and not the full name.

PO Number 1083 - 1289.2-1.100 Christenson North American Fly LTD	Bang & Olufsen Standard Purchase Order	PO Date 7/7/2012
Vendor: Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA	Account #:	Ship to: Bang & Olufsen Standard 100 Purchasing Lane Purchasing City, WI 567937

Enhancement – Project Fees: Labor & Parts Fees - Directed to Fees Report Options













The Option to Show or Hide the Fees Directed to Labor & Parts on the Fees Report section has been improved for better clarity. The Label for these fees can also be modified to suit. These Parts and Labor Directed Fees amounts always shows in the Sub and Grand Totals.

Fees Directed to Parts - Fees Report			
Total Parts Directed Fees			\$25.00
<input type="checkbox"/> Hide Parts Total on Fees Report (show in Grand Total)			
Optional Label	Fees Report Display	Amount	
Part Fees:	Part Fees:	\$25.00	

Fees Directed to Labor - Fees Report			
Total Labor Directed Fees			\$1,295.00
<input type="checkbox"/> Hide Labor Total on Fees Report (show in Grand Total)			
Optional Label	Fees Report Display	Amount	
Labor Fees:	Labor Fees:	\$1,295.00	

Enhancement – Project/Print Menu/Shop: Staging Document. Unit Cost & Unit Sell

All Staging Documents now display the Unit Cost & Unit Sell prices for Products, Parts and Wires.

Installation Utilities	
Select Phases	<input type="checkbox"/> 1 Prewire <input type="checkbox"/> 2 Trim <input type="checkbox"/> 3 Final
Staging by Make-Model (Total Qty)	
	 Product Staging
Print All	 Part Staging
	 Wire Staging
Staging by Zone-Area (Total Qty)	
	 Product Staging
Print All	 Part Staging
	 Wire Staging
Staging by Discipline (Total Qty)	
	 Product Staging
Print All	 Part Staging
	 Wire Staging

9/12/2012

EME Audio & Video Systems - Confidential Report

Staging Document - Products

Mike & Jessica Potter

Security System

1282.1-1.100

Page 1

Total Qty

Sorted by Make-Model

Phase-Class	Qty	Make-Model-SKU-Finish-Unit	Cost-Unit Sell	Ck	InStock	OnOrder	Date	Initial
3 Final	2 ea	Linn : 5101 Personal Handset : Black		Order	<input type="checkbox"/>			
		Universal learning remote		Rc'vd	<input type="checkbox"/>			
		\$234.00 \$390.00		Stock	<input type="checkbox"/>			
		#		Delivered	<input type="checkbox"/>			
3 Final	2 ea	Linn : 5125 : Silver		Order	<input type="checkbox"/>			

Enhancement – Product Library/Utilities: Show All Items or Stay in Found Set

When entering or leaving the Product Utilities screen you can now choose to Show All Products or Only the Products in the Found Set. This enables you to Find/Select only a group of Products and then go into the Utilities module and groom only those Products instead of All Products. Also after importing Products in the Utility module you can leave the module and show only the Products you just imported or All Products in your Library.

The screenshot shows the 'Product Library - Line List' window. At the top, there's a search bar and a 'Show Hidden' checkbox. Below that are tabs for 'All', 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z'. On the left, there are buttons for 'Show Products', 'Show All', 'Product Utilities', 'Part', 'Phantom', 'Hidden', 'Show Recent Products', 'Bulk', 'PreCut', 'All Supps', and 'Discontinued'. In the center, there's a logo for 'B&O' and a message box that says 'Show All Products or Only These Products.' with buttons for 'These Prods' and 'Show All'. On the right, there are buttons for 'Phan', 'Part', 'New Product', 'Lab', 'Wire', 'Inventory Control', 'Detail List', 'Product Sets', and 'Print Menu'. At the bottom, there's a table with columns: 'Equip', 'At & T', 'Model : SKU', 'Description', 'Finish', 'Sell Price', 'Cue', 'Auto Tag', 'Notes', and 'Fav Hid'. The table lists several equipment items with their respective prices and status.

Enhancement – Product Library: Duplicate Product message includes Finish

The Validation that requires new Products to have a unique Make and Model now includes Finish. So now the Make and Model can be the same as another product in the Product Library as long as the Finish is unique. Also the Validation message grammar has been corrected.

Find Products Replace Data Product Library - Product Detail 2 of 2 ? Home

Duplicate Product
 Delete Product

Created: 10/9/2012
 Sell Updated: 6/2/2011
 Cost Updated: 6/2/2011
 Product is Not in a Proposal/Project

AT & T
 249 Copy
 Cordless Phone Battery
 Equipment : :

New Product Done Prev Next

Product Specs Tax PDF Labor Parts Wire Tasks

Make AT & T
 Model 249
 SKU
 Finish Black
 Description Cordless Phone Battery
 Features

FileMaker Pro

You do not have Access Rights or the Make-Model-Finish is not Unique or Model is greater than 16 characters. You can Duplicate this Product and change the Model. Please click Revert Field.

OK

Equipment : :
 Class
 Phase 1 Prewire
 Tax B Proposal Sort Order
 Fee SKU Phantom Product ?
 New Item Do not Hide ?

Enhancement – Product Library/Utility/User Import: Ultimate Excel Import Map

Modify Import Map to new Ultimate Excel specifications.

Import Products from Excel (xls) file

Ultimate Sound & Installation, Inc.

Import

Import will update products that have the same Make and Model.
 Import will add products that do not exist in the Product Library.

Make	→	pd.make
Model	→	pd.model
QB Item	→	pd.sku
Description	→	pd.description
Finish	→	pd.finish
Features	→	pd.features
Unit	→	pd.unit
Sell	→	pd.unit.sell
Cost	→	pd.unit.cost
Tax	→	zf.taxA
Vendor	→	pd.supplier
Class	→	pd.class
Discipline	→	pd.dept
Category	→	pd.category
Type	→	pd.type
Cue Notes	→	pd.cueNotes

Enhancement – Product Library/Utility/General Import: Import CPS Products from CPS Export

Users that are migrating from CPS can first find the Products they wish to Export in CPS (in CPS 7.9v31-12 or later, script: Export Products 2) and then use the CPS/Utility Export Products 2 to create a file that can be Imported into SCPS from the SCPS/Utility/General Import screen.

CPS

Delete Products	Find Duplicate Products	154 of 154	Product Utility Scroll down to view field definitions.	Clean Products	Open Vendor Library	Done
Import Product <i>Importing Tab or Comma delimited file</i>		<p>After clicking the button you will be asked if you want to delete all products in the Library. If you want to Import just ONE manufacturer at a time, you should go back to the Product Library Detail List and Find, Tag and Delete that Manufacturers products, and then do the import and DO NOT delete the Product Library.</p> <p>After importing you may want to print a Orphaned Product Set report to see which Sets in your Sets Library no longer has subset products to connect to. You can then reestablish them from the Sets Library.</p> <ol style="list-style-type: none"> 1. Click on "Import" button. 2. Locate and open the File containing the data you want to import. 3. At the "Import Mapping" screen; <ol style="list-style-type: none"> a: For CPS Product files, set View By: to "Matching Names". b: For other files align "data in" fields on the left with CPS data fields on the right. by clicking on a CPS field and dragging it up or down into the right position. Click on the arrow between the lists to insure that the data transfers. 4. Select "Add new records" and click on the "Import" button at the bottom of the screen. 5. Click on "OK" in the "Import Options" screen that appears. 				
Print these Instructions & Field Definitions						
Import Products 1		<p>These buttons can be used for importing and exporting of products and their field maps can be saved for repeated use.</p>				
Export Product 1		<p>This will create a file in your CPS folder named CPSQBin.v.iif</p>				
Export Products 2		<p>This will create a file with Exported Products that you selected with an FP5 file extension. It can then be Imported into SCPS from the Product Library/Utility/Import screen.</p>				
		Import SCPS Products				

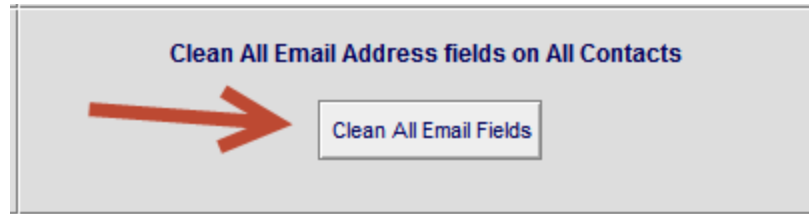
Enhancement – Contacts/Entities: Expand and Sort Entity List

The Entities Portal has been expanded to display more Entities and is now Sorted by Number instead of Entity Kind so that like kind Entities are grouped together.

[illegible]

Enhancement – Contacts/Utility: Clean All Contact Email Fields

A new Contact Utility enables you to automatically clean the Email Address fields on all of your Contacts. Any data in this field that is not an email address “@” will be moved and appended to the Info field. This process will be performed on All of your Contacts and all of the Email address fields for each Contact.



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

Duplicate Contact Delete Contact

Tom & Kelly & Family Burkes
Sunbelt Business Brokers

New Proposal New POS New Task New Contact

Details Info Com Log Entities Files & Pix Transactions

Labels

Category Client Class Key ID Fav A

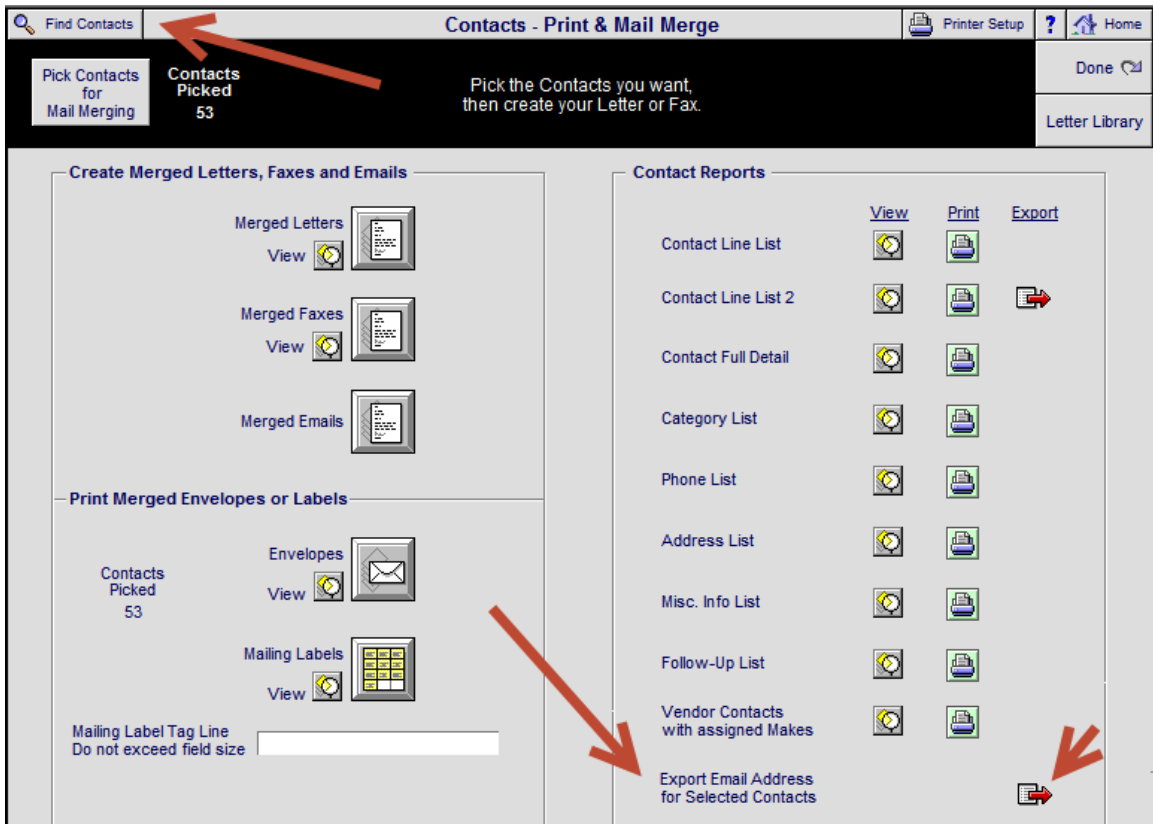
Create Vendor and Assign Product Makes Group Status Staff SE Tickler Tag

Fav Print Contact Contact

SL	Title	First Name	Last Name	Info	Email Address	Email
<input type="radio"/>	Mister	Tom	Burke		tom@burke.to	
<input checked="" type="radio"/>		Tom & Kelly & Family	Burkes	Wife	kelly@burke.to	
<input type="radio"/>		Molly & Tighe	Burke	Molly 6 and Tighe Kids tige		
<input type="radio"/>		Kelly	Burke	Tom Birthday 7/27/00 & Molly		
<input type="radio"/>						
<input type="radio"/>						
<input type="radio"/>						
<input type="radio"/>						
<input type="radio"/>						

Enhancement – Contacts/Print Menu: Add Find Contacts button & Export Emails

The print Menu screen now features a Find Contact utility to Find desired Contacts prior to printing Reports. An Export button to export only email addresses to a Tab formatted file that can be opened by Excel has been added. First select the desired Contacts and then click this button to export the email addresses for those Contacts. This feature has also been added to the Contact/Utility/Export screen.



Enhancement – Contacts/Find Contacts: Contacts with Primary Email addresses filter

When using the Find Utility you can now enter your find criteria and then click on the “Find Emails” button to Find only those selected Contacts that have a Primary Email Address.

The screenshot shows the 'Contacts - Find Contacts' window. At the top, there's a 'Fast Find by Phone' section with a text input field. Below it, a message says 'Enter all of your Find Criteria and then click on Find' and 'Finding Contacts by Date Range is done from the Contact Utility screen'. There are 'Find' and 'Cancel' buttons. The main area is divided into sections: 'Labels' with fields for Category, Class, Key, ID, Group, Status, Staff, and Tickler; 'Company' with fields for Vendor # and Web Address; and a section for 'First Name', 'Last Name', 'Info - Title', and 'Email Address'. A red arrow points to the 'Find Emails' button located at the bottom right of the 'Email Address' field.

Enhancement – Proposal: Custom Layouts with Bullet Points

Proposal Bullet Points can be entered into the Master Preferences and then selected for inclusion in your Proposal. This feature has been created for Bang & Olusen Custom Proposal Layouts and can be incorporated in other users Custom Layouts. Please contact Horizon Software.

In Master Prefs/Other/Misc 2: Custom Layouts Checkbox

The screenshot shows a section titled 'Bullet Points for Custom Layouts'. It contains three checkboxes: 'Overview Bullet Points', 'Display Custom Reports', and 'Text Entry Length Markers'. A red arrow points to the 'Overview Bullet Points' checkbox, which is currently unchecked.

Install the Bang & Olufsen custom Reports file B&O 9.7v1 and Proposal Print Menu checkbox

The screenshot shows the 'Print Status' section in Master Preferences. It includes fields for 'Shop Location' (Bang & Olufsen Standard), 'Contract' (1 - Contract 1), 'Product Listing Option' (A1 Make-Model-Description-Finish), 'Product Pricing Option' (Product : Ext Sell), 'Subtotal Pricing Option' (5 Subtotals), and 'Printer Name' (PDF reDirect Pro v2,winspool,Ne01:). There are also fields for 'Proposal Status', 'User Print Cue', and 'Report Date' (10/16/2012). A red arrow points to the 'Custom Proposal Layouts' checkbox, which is checked. Below it, the text 'Version B&O 9.7v1' is displayed.

Click on Master Prefs/Proposals/Overviews: Custom Reports Bullet Points button

The screenshot shows the 'Master Prefs - Proposal Prefs - Overviews' window. It has a top bar with 'Print', '?', and 'Home' buttons. Below is a table with tabs: 'Cover Page', 'Text & Fees', 'Contracts', 'Proposal Print Options', 'Client Intro', 'Overviews', 'Terms', 'Shop Intro', 'Extra Pages', and 'Pricing'. A red arrow points to the 'Custom Report Bullet Points' button in the bottom right corner. The main area is titled 'Master Overviews' and contains a table with columns: 'Auto Add to New Proposals Default', 'Edit', 'Overview Title', 'Overview Text', 'Added to Master OV's from this Entity', 'Sort', and 'Remove'. The first row shows 'Linn Products' with the text 'Linn Products Limited is an independent'.







Populate the Master Prefs/Proposals/Overviews/Bullet Points screen and check the desired defaults. A maximum of 10 Bullet Points can be populated and any 6 can be selected from within any Proposal. You may check the defaults you want a Proposal to start with. If you exceed 6 you will receive a warning message and will not be able leave this screen.

Master Prefs - Overview - Bullet Points Option ?

Check the Default Bullet Points for new Proposals (Max 6)
Please stay within field borders and paste pictures into the Pix fields

Done

Only a Maximum of 6 Bullet Point defaults can be checked.
Any 6 of the 10 Bullet Points can be selected from the Print Menu/Prefs screen of any Proposal
Selection Count
6

Default	Title	Text	Pix
<input checked="" type="checkbox"/>	Sky+ HD	Access the widest selection of television channels with many in High-Definition and more radio stations. The easiest recording of single programmes or whole series available. 1	
<input checked="" type="checkbox"/>	Blu-ray player	Watch superb quality High-Definition Blu-ray discs, and your existing DVDs. 2	
<input checked="" type="checkbox"/>	Spotify	Listen to almost any track or album without having to own it. Simply type the name of the track, press play and it will be wirelessly transmitted to your Bang & Olufsen system 3	
<input checked="" type="checkbox"/>	Apple TV	Your iTunes music via your television, iPad or iPhone. Rent or buy movies and television series in High-Definition. See your digital photos onscreen, watch videos from You Tube and listen to internet radio 4	
<input checked="" type="checkbox"/>	iPod/iPhone dock	Experience content from an iPod or iPhone belonging to you or your friends. 5	
<input checked="" type="checkbox"/>	Sky HD	Access the widest selection of television channels with many in High-Definition and more radio stations. The easiest recording of single programmes or whole series available. 6	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

From within a Proposal/Print Menu/Preferences screen you can click on the Bullet Point button to change the Defaults to the selections of your choice for this proposal.

ABC Spell Reset to Master Prefs **Proposal/Project Prefs - Cover Page** ? Home


LeRoy Asher

Home Entertainment System
1293.1-1.100


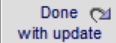









Cover Page Fees Contracts
Client Intro Terms
Shop Intro Extra Pages Pricing

Bullet Points

Print Menu Print Options


BANG & OLUFSEN

Check the Pick boxes to choose up to 6 Bullet Points for this Proposal and then click the Update Proposal Selection to display your selections. This update automatically happens when you leave this screen. If you pick more than 6 you will receive a warning message and will not be able to leave this screen. An Uncheck all button is available in the upper left area as well.

UnCheck All		Selection Count: 4		Proposal/Preferences - Bullet Points	
Only a Maximum of 6 Bullet Points can be Selected for this Proposal.		LeRoy Asher		 	
		Home Entertainment System		1293.1-1.100	
Pick	Title	Text	Pix	Proposal Selections	
<input checked="" type="checkbox"/>	Sky+ HD	Access the widest selection of television channels with many in High-Definition and more radio stations. The easiest recording of single programmes or whole series available. 1		Sky+ HD  Access the widest selection of television channels with many in High-Definition and more radio stations. The easiest recording of single programmes or whole series available. 1	
<input type="checkbox"/>	Blu-ray player	Watch superb quality High-Definition Blu-ray discs, and your existing DVDs. 2			
<input checked="" type="checkbox"/>	Spotify	Listen to almost any track or album without having to own it. Simply type the name of the track, press play and it will be wirelessly transmitted to your Bang & Olufsen system 3		Spotify  Listen to almost any track or album without having to own it. Simply type the name of the track, press play and it will be wirelessly transmitted to your Bang & Olufsen system 3	
<input checked="" type="checkbox"/>	Apple TV	Your iTunes music via your television, iPad or iPhone. Rent or buy movies and television series in High-Definition. See your digital photos onscreen, watch videos from You Tube and listen to internet		Apple TV  Your iTunes music via your television, iPad or iPhone. Rent or buy movies and television series in High-Definition. See your digital photos onscreen, watch videos from You Tube and listen to internet	
<input type="checkbox"/>	iPod/iPhone dock	Experience content from an iPod or iPhone belonging to you or your friends. 5			
<input checked="" type="checkbox"/>	Sky HD	Access the widest selection of television channels with many in High-Definition and more radio stations. The easiest recording of single programmes or whole series available. 6		Sky HD  Access the widest selection of television channels with many in High-Definition and more radio stations. The easiest recording of single programmes or whole series available. 6	
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Selected Bullet Points appear on the Custom Reports Layouts if it has been created, such as the Shop Info section of the Proposal for Bang & Olufsen. Please contact Horizon if you want use the Custom Reports module and wish to use the Bullet Points feature.

Initial proposal for LeRoy Asher

Sky+ HD

Access the widest selection of television channels with many in High-Definition and more radio stations. The easiest recording of single programmes or whole series available. 1



Blu-ray player

Watch superb quality High-Definition Blu-ray discs, and your existing DVDs. 2



Spotify

Listen to almost any track or album without having to own it. Simply type the name of the track, press play and it will be wirelessly transmitted to your Bang & Olufsen system 3



Apple TV

Your iTunes music via your television, iPad or iPhone. Rent or buy movies and television series in High-Definition. See your digital photos onscreen, watch videos from You Tube and listen to internet radio 4



iPod/iPhone dock

Experience content from an iPod or iPhone belonging to you or your friends. 5



Bang & Olufsen Standard
650-321-3244
Stanford@beo-mail.com

BANG & OLUFSEN



WHAT MOVES YOU.

Also selecting the Bullet Point Option in Master Prefs will display the Text Markers on several screens which indicate the limits of Text you can enter, so they will be properly displayed on the Custom Proposal Reports.

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

Location 1

Dear Client Name Use First Name ☐

This proposal intends to clearly show how your new system will work in your home, how it would feel to use and what it would allow you to do. The first pages answer some general questions about the system, and then the system is presented room by room.

If you have any questions or concerns not answered here or would like more detail in specific areas please just ask – our aim is to provide you with a perfect solution.

Please evaluate this proposal to determine if it meets your needs and budget. EME's design flexibility allows us to easily modify this proposal to truly meet your expectations. This plan can be fully implemented at this time or in stages as your needs grow.

Our best designs are the result of strong partnerships. When we take your ideas and partner them with our quality products and professional execution the results are always beyond expectations.

You will find our proposals to be very complete and well thought-out. We always specify everything in straightforward terms and in writing. No hidden costs or surprises. Changes are only made upon your written authorization.

Closing Sincerely,

John Smith
AV Specialist

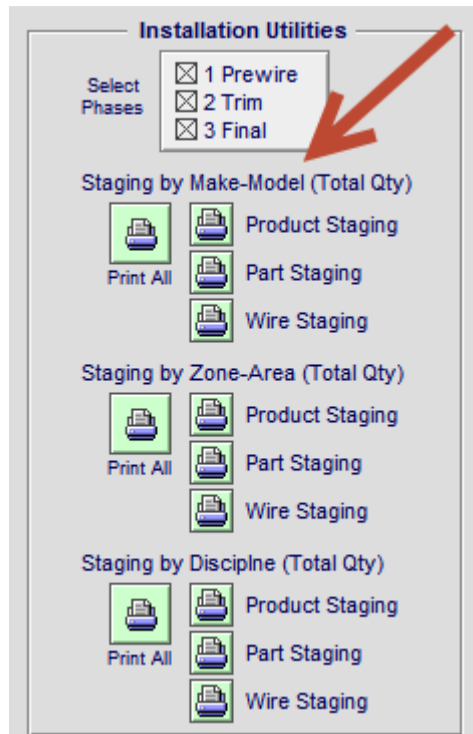
B&O Users
Do not enter text below this line

Fix – Master Preferences: Clean duplicate records

It is important that the Master Preferences database contains only 1 record. Each time you enter this module SCPS checks for this and deletes any additional records it finds.

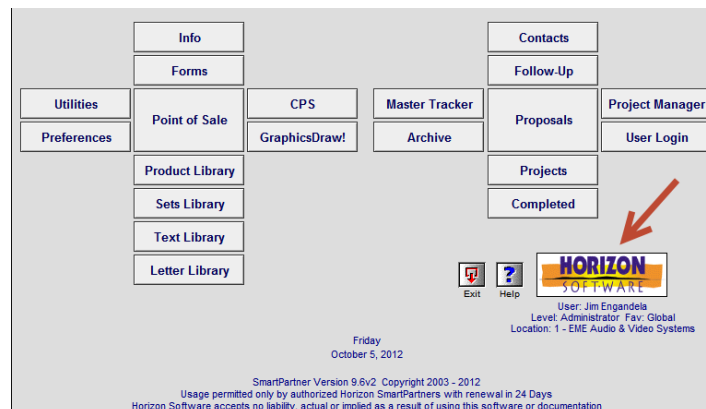
Fix – Project/Print Menu/Shop: Include Change Orders in Product Staging Reports

A new Change Order routine has been created to insure that positive and negative Change Order Products are factored into the All Product Staging Reports. The Staging by Make-Model Part Staging report has also been fixed so that it reports correctly.



Fix – Alternate Logo Screen: Add Horizon Logo

Add Horizon Logo to the Alternate Main Logo screen.



Fix – Project & Final CO/Project: Changing Dates returns to proper screen

You can change the Dates of a Project or a Final Change Order from the Project screen or the Tracker and will now be returned to the proper screen with completed.

Master Project - Project Info

Client: LeRoy Asher
Project: Home Entertainment System
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
1	Basic Rate	Installation	60.00	30.00
2	Inner City Rate	Programming	80.00	40.00

Install Phase Dates

Start Dates ? Real Date

1 - Prewire 9/29/2012 ☐

2 - Trim 10/29/2012 ☐

3 - Final 11/28/2012 ☐

Completion Date

Update all Completed Tasks

Target Completion Date 2/26/2013

If empty the Completed Date is the Project to Completed Project Conversion Date

Fix – Project/PO: Printed report Extended Cost and Unit

The Print PO now properly displays the PO Extended Cost and the Product Unit.

PO Number: 1075 - 1284.1-1.100
PO Date: 9/12/2006

EME Audio & Video Systems
Purchase Order

Vendor: Linn Products
Account #: 8787 Perimeter Park Blvd.
Jacksonville, FL 32216 USA

Ship to: EME Audio & Video Systems
100 Purchasing Lane
Purchasing City, WI 587937

Phone: (W) 904-645-5242
Fax: 904-645-7275
Email: patricia@linninc.com

Phone: 715-287-3335
Fax: 715-287-4464
Email: horizon@trivest.net

Project: John & Mary Smith
Project Reference: 1284.1-1.100

Buyer: Joe Buyer
Email: horizon@trivest.net

Special Instructions

Order Qty	Unit	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	Silver	4,797.00	4,797.00
Rovd		Twin-BindPost Klimax two-channel power amplifier			
2 ea	Linn	Melodik	Black	2,970.00	5,940.00
Rovd		Aktive isobarik bass extension loudspeaker			

Fix – Log in Exit Timer: Increase Exit Time to 5 minutes

If you stay at the Log in screen for more than 5 minutes without logging SCPS will exit. This has been increased from 90 seconds to 5 minutes.

Enhancement – Horizon Logo: Move from Prefs to Open file

The Horizon logo has been moved from the Prefs file to the Open file so that it no longer is part of the upgrade routine.

Enhancement – Master Prefs & Proposal/Print Options: Unification

Both Master Prefs and Proposal Print Option screens now have the same layout, which makes them easier to comprehend and use.

Printer Setup		Proposal/Project Prefs - Print Options		Home
PDF reDirect Pro v2,winspool,Ne01:		Mr. & Mrs. Lee Christenson North American Fly LTD Home Entertainment System 1289.1-1.100		Push Contract Lines
Company Location <div>Company Location</div> <div>1</div> <div>EME Audio & Video Systems</div>		Contract - "Selection" Default <input checked="" type="radio"/> Use Contract 1 Contract 1 <input type="radio"/> Use Contract 2 Contract 2 <input type="radio"/> Use Contract 3 <input type="radio"/> Use Contract 4		
Areas & Products Report - "Formatting" <input checked="" type="radio"/> Yes <input type="radio"/> No Page Break after each Area <input type="checkbox"/> Products - Do not Sort products by Discipline <input type="checkbox"/> Products - Show Product Install Location <input type="checkbox"/> Hide Area Text <input type="checkbox"/> Show Area Text - No Products <input type="checkbox"/> Sort Areas by: Zone/Location/Placement/Area Normal Sort = Location/Zone/Placement/Area		Contract - "Subtotals" <div>5 Subtotals</div> 5 Subtotals = All 5 Subtotals separate 3 Subtotals = 1 (Products), 2 (Parts + Wire), 3 (Labor + Fees) 2 Subtotals = 1 (Products + Parts + Wire), 2 (Labor + Fees) 1 Subtotal = Combines All and Shows only 1 Subtotal <i>Fees combined with Labor only show in the Contract</i>		
Areas & Products Report - "Pricing" <u>Line Item Prices</u> <input checked="" type="radio"/> Product : Ext Sell <input type="radio"/> Product/Parts/Wire : Ext Sell <input type="radio"/> Product + Product Labor : Ext Sell <input type="radio"/> Product/Parts/Wire + Product/Parts/Wire Labor : Ext Sell <input type="radio"/> Product : Ext List <input type="radio"/> Hide Sell Price <u>Option Prices (in Product Description)</u> <input type="radio"/> Show Sell Price <input checked="" type="radio"/> Do Not Show Option prices <input type="radio"/> Show as selected Print Option prices <input type="radio"/> Show Prices regardless of Print Option setting <input type="radio"/> Show as Installed Products & Supplements <u>Area SubTotal Prices</u> <input checked="" type="radio"/> Show Area Totals <input type="radio"/> Hide Area Totals		Contract - "Price Expiry Notice" <input type="checkbox"/> Do not show Price Expiry Notice <input type="checkbox"/> Do Not Show Date		
		Contract - "List Price & Discount" <input checked="" type="radio"/> Yes <input type="radio"/> No Show List Price & Discount		
		Contract - "Sales Tax" <input checked="" type="radio"/> Yes <input type="radio"/> No Show Sales Tax <div>AB Tax</div> Show Tax Totals		
		Contract - "Warranty Terms" <input checked="" type="radio"/> Factory <input type="radio"/> Extended		
		Overviews - "Page Breaks" <input checked="" type="checkbox"/> Page Break after each Overview		
		Fees Report - "Prices" <input type="radio"/> Yes <input type="radio"/> No Show Fees Prices <input type="radio"/> Yes <input type="radio"/> No Show Fees Totals		
		Fees Report - Parts and Labor Directed to Fees <input type="checkbox"/> Hide - Parts Directed Fees - Label & Amount <input type="checkbox"/> Hide - Labor Directed Fees - Label & Amount		
Product - "Line Listing" <div>A1 Make-Model-Description-Finish</div>		Labor Listing <input type="checkbox"/> Do not show Labor Hours on Proposal Reports <input type="checkbox"/> Do not show DOD on Labor Detail Report		
Product - "Features Text" <input type="radio"/> All <input type="radio"/> Areas & Products Report <input type="radio"/> None <input checked="" type="radio"/> Product Summary Report (recommended)				
Product - "Pictures" <input type="radio"/> All <input type="radio"/> Areas & Products Report <input type="radio"/> None <input checked="" type="radio"/> Product Summary Report (recommended)				

Enhancement – Proposal/Detail: Colored sections to improve clarity

Zone Areas, Disciplines and Phase sections are now lightly colored to improve clarity.

Q Discipline		Area	Q Phase	Proposal - Detail by Area		Q View	Utility	?	Home
Client		Areas	Area Text	Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100		Pricing		Purchasing	Leave
Project	Info	Products	Overviews			Tracker		Work Orders	Change Orders
Contact	Log	Supplements	Project Fees			Payments		Invoicing	Print Menu
Client Mode		Wire Manager	Super View			Labor Meter		Labor Total	Grand Total
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 : Black				390.00	
Attic								5,155.00	
Audio : Source : CD Player		1 ea	Linn : Klassik Music-B	Integrated CD				1,550.00	
Audio : Source : CD Player		1 ea	Linn : Klassik Music-B	Integrated CD				1,550.00	
Audio : Speaker : On-Wall		2 ea	Linn : Klassik Unik	Full range loudspeaker for front,				450.00	
Audio : Speaker : On-Wall		2 ea	Linn : Klassik Unik	Full range loudspeaker for front,				450.00	
Zone 1 - Home Theater								12,173.23	
Video : Display : DLP Video Projector		1 ea	Runco : CL-610	DLP Projector				7,995.00	
Video : Source : DVD Player		1 ea	Sony : DVP-NS999ES	Progressive Scan DVD Player : Black				1,099.95	
Automation : Remote : Handheld Remote		1 ea	Linn : 5101 Personal Handset	Universal learning remote : Black				390.00	
Automation : Control : Keypad		1 ea	Linn : Knekt RCU	Knekt room control unit : White				750.00	
Zone 2 - Living Room								12,433.75	
Audio : Speaker : Center Channel		1 ea	Klipsch : RC-35	Center Channel Speaker : Black Ash				399.00	
Audio : Speaker : Floor		2 ea	Klipsch : RF-35	Reference Tower Speaker : Black				998.00	
Audio : Speaker : Bookshelf		2 ea	Klipsch : RS-7	Reference Surround Speaker : Matte				900.00	
Audio : Speaker : Powered Subwoofer		1 ea	Klipsch : RSW-10	Reference Subwoofer : Black Ash				1,000.00	
Audio : Amplifier : Surround Receiver		1 ea	Linn : Klassik Movie Di	Integrated multi-channel DVD-CD				3,995.00	
Audio : Speaker : Floor		1 pr	Linn : Ninka	Floor-standing loudspeakers: pair :				1,850.00	
Zone 3 - Office								9,790.19	
Audio : Amplifier : Surround Receiver		1 ea	Linn : Klassik Movie Di-B	Integrated multi-channel DVD-CD				3,995.00	
Audio : Speaker : 5.1 System		1 ea	Linn : Klassik Speaker Package	Complete 5 speaker surround system				2,250.00	
Video : Display : TV GT 27 Inch		1 ea	Sony : KV-27FS13	27 FD Trinitron® WEGA® TV				549.99	
Video : Source : VCR		1 ea	Sony : SLV-N99	VHS Video Cassette Recorder				199.00	
Automation : Control : Keypad		1 ea	Linn : Knekt RCU	Knekt room control unit : White				750.00	



















Discipline	Area	Phase	Proposal - Detail by Discipline							Print		Home
Subtotals	Subtotals	Subtotals	Bobbie Jo Ryskoski							Done		
Grand Totals	Grand Totals	Grand Totals	Satellite System 1277.1-1.100									
Discipline : Category : Type			Make : Model		Description		Totals Include Supplements, no Tax					
Satellite System							\$26,026.38					
Audio							13,446.00					
Audio : Amplifier : Multi-channel			1 ea	Linn : 5125	Five channel power amplifier (Black) :		2,392.50					
Audio : Speaker : Bookshelf			5 pr	Linn : Katan	Bookshelf loudspeakers: pair : Black		4,328.25					
Audio : Speaker : Powered Subwoofer			1 ea	Linn : Melodik	Aktive isobarik bass extension		4,306.50					
Video							8,277.56					
Video : Display : DLP Video Projector			1 ea	Runco : CL-610	DLP Projector		6,955.65					
Video : Source : DVD Player			1 ea	Sony : DVP-NS999ES	Progressive Scan DVD Player : Black		956.96					
Automation							2,445.13					
Automation : Remote : Handheld Remote			1 ea	Linn : 5101 Personal Handset	Universal learning remote : Black		339.30					
Automation : Control : Keypad			1 ea	Linn : Knekt RCU	Knekt room control unit : White		652.50					

Discipline	Area	Phase	Proposal - Detail by Phase				Print	Home
Subtotals	Subtotals	Subtotals	Bobbie Jo Ryskoski					
Grand Totals	Grand Totals	Grand Totals	Satellite System 1277.1-1.100					
Phase	Zone - Area	Discipline	Make : Model	Description	Totals Include Supplements, no Tax			
Satellite System					\$26,026.38			
1 - Prewire					3,234.88			
2 - Trim					805.00			
2	Zone 1 - Home Theater	Automation	1 ea Linn : Knekt RCU	Knekt room control	652.50			
3 - Final					21,986.50			
3	Zone 1 - Home Theater	Audio	1 ea Linn : 5125	Five channel power	2,392.50			
3	Zone 1 - Home Theater	Audio	5 pr Linn : Katan	Bookshelf	4,328.25			
3	Zone 1 - Home Theater	Audio	1 ea Linn : Melodik	Aktive isobarik bass	4,306.50			
3	Zone 1 - Home Theater	Video	1 ea Runco : CL-610	DLP Projector	6,955.65			
3	Zone 1 - Home Theater	Video	1 ea Sony : DVP-NS999ES	Progressive Scan	956.96			
3	Zone 1 - Home Theater	Automation	1 ea Linn : 5101 Personal Handset	Universal learning	339.30			

Enhancement – Proposal/Products: Colored sections to improve clarity

Products are lightly colored to improve clarity.

Super View		Area Sum		Prod Sum		Proposal - Areas & Products				Client Mode		Auto Build		Grand Total		? Home	
Areas		Text		Products		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100						Products Labor Parts Wire		\$9,142.00 \$925.00 \$95.00 \$2,271.75		Done	
Labor		Parts		Wire		Tasks		Area Total						\$12,433.75		Labor Time 14:52:30	
Loc		Zone		Areas		<input type="checkbox"/> No Prompt		Products in the Zone 2 - Living Room									
				Pick or Type Area		<input type="button" value="+"/> Area		<input type="button" value="+"/> Products		<input type="button" value="+"/> Sets		<input type="button" value="+"/> Supplements				<input type="button" value="Tag"/>	
				Max 40 Characters													
Location		Zone		Sort		Area		Rename		Set		Dup		Discipline		Unit Sell	
														Category : Type		Extended Sell	
														Qty		Make : Model	
														Sort			

Super View			Area Sum		Prod Sum		Proposal - Products					Client Mode		?		Home			
Areas		Text		Products		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100					Phantom =		Update All Products		Auto Price Adjuster		Done		
Labor		Parts		Wire		Tasks		Show All		Install Location Notes		Switch Many Products		Delete All Options		Product Total \$40,925.89			
No Discount																			
Exclude \$		View		Qty		Zone - Area		Make		All 29 Products		Product Labor		Unit List		Adjusted Sell		Extended Sell	
Switch Product		Option		Change Group		Discipline		Category		Model		Parts Labor		Unit Cost		Unit Sell		Ext Installed	
Phase						Type		Description		Wire Labor		Updated Sell		GP%		Ext Discount			
				1 ea		Atrium		Linn		5101 Personal Handset		862.50				390.00		390.00	
						Audio		Multi-room		Universal learning remote :		1,085.00		234.00		390.00		1,252.50	
				2		1267.1		Keypad		Black		1,312.50		6/2/2011		40.0%			
				1 ea		Attic		Linn		Classik Music-B		35.00				1,550.00		1,550.00	
						Audio		Source		Integrated CD		930.00				1,550.00		1,585.00	
				3		1267.1		CD Player		Blue		120.00		6/2/2011		40.0%			
				1 ea		Attic		Linn		Classik Music-B		35.00				1,550.00		1,550.00	
						Audio		Source		Integrated CD		930.00				1,550.00		1,585.00	
				3		1267.1		CD Player		Blue		120.00		6/2/2011		40.0%			

Clear All Area Text

Proposal - Area Text

Jim Engandela
Horizon Software
Home Entertainment System
1267.1-1.100

Done

Areas	Text	Products
Labor	Parts	Wire
Pick	1 - Pick Area	2 - Pick Text Category
<ul style="list-style-type: none"> Atrium Attic Zone 1 - Home Theater Zone 2 - Living Room Zone 3 - Office Zone 4 - Dining Room Zone 4 - Kitchen Zone 5 - Master Bedroom Zone 5 - Master Bathroom 	<ul style="list-style-type: none"> Audio Commercial Sound Control Installations Jacks Racks Rooms Security Systems Vacuum Video 	<ul style="list-style-type: none"> AC mains supply Installation integrity Wiiring - audio, video, telephone
Products in: Zone 2 - Living Room		Proposal Text for: Zone 2 - Living Room
<ul style="list-style-type: none"> Klipsch : RC-35 Klipsch : RF-35 Klipsch : RS-7 Klipsch : RSW-10 Linn : Classik Movie Di Linn : Ninka 		<p>Home music systems require careful design and installation to achieve their maximum hi-fidelity potential. music is the communication of emotion. a great stereo must sound pleasant and be emotionally involving. to achieve this care must be taken in matching and tuning each component so that the whole system will perform in harmony with the music. frequency response, sound pressure levels, imagery, tonal balance and distortion are a few of the parameters that are taken into consideration and adjusted for maximum performance.</p>

Proposal - Super View

Jim Engandela
Horizon Software
Home Entertainment System
1267.1-1.100

Grand Total: \$9,142.00
Equipment Installation: \$925.00
Misc. Parts: \$55.00
Wire & Cable: \$2,271.75
Labor Time: 14:52:30

Total: Zone 2 - Living Room: \$12,433.75

Select an Area	Products	Parts Supplements	Wire Supplements
Qty Discipline Make : Model	Unit Sell Ext Sell	Qty Make : Model Associated Product Unit Sell Ext Sell	Bulk Precut Qty Make : Model Associated Product Unit Sell Ext Sell
Zone - Area			
Atrium	1 ea Klipsch : RC-35 \$399.00	1 ea Linn : Phono Plugs-Standard \$95.00	B 75 ft Linn : K20 Cable \$2.74
Attic	2 ea Klipsch : RF-35 \$499.00	Klipsch : RSW-10 \$95.00	Klipsch : RC-35 \$205.50
Zone 1 - Home Theater	2 ea Klipsch : RS-7 \$998.00		B 75 ft Linn : K20 Cable \$2.74
Zone 2 - Living Room	2 ea Klipsch : RS-7 \$450.00		Klipsch : RF-35 (6483) \$205.50
Zone 3 - Office	2 ea Klipsch : RSW-10 \$1,000.00		B 75 ft Linn : K20 Cable \$2.74
Zone 4 - Dining Room	2 ea Klipsch : RSW-10 \$1,000.00		Klipsch : RF-35 (6483) \$205.50
Zone 4 - Kitchen	1 ea Linn : Classik Movie Di \$3,995.00		B 75 ft Linn : K20 Cable \$2.74
Zone 5 - Master Bedroom	1 ea Linn : Ninka \$1,850.00		Klipsch : RS-7 \$205.50
Zone 5 - Master Bathroom	1 pr Linn : Ninka \$1,850.00		B 75 ft Linn : K20 Cable \$2.74
	Audio Floor-standing \$1,850.00		Klipsch : RS-7 \$205.50
			B 75 ft Linn : Bulk Analog Interconnect \$4.25
			Klipsch : RSW-10 \$318.75

Proposal - Area Sum

Client Mode

Jim Engandela
Horizon Software
Home Entertainment System
1267.1-1.100

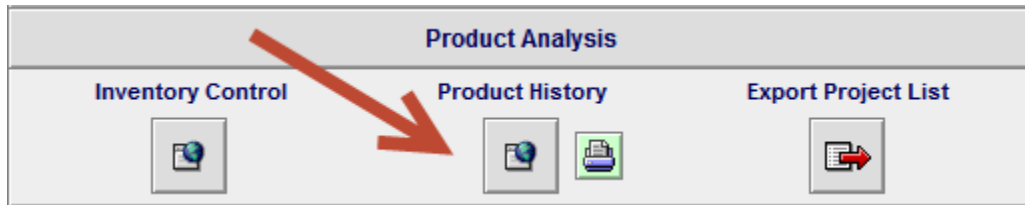
Done

View Products in this Area

Zone - Area	Equipment	Installation	Misc. Parts	Wire & Cable	Area Totals	Labor
Atrium	\$390.00 40.0%	\$862.50 47.3%	\$1,085.00 40.2%	\$1,312.50 44.1%	\$3,650.00 43.3%	10:52:30
Attic	\$4,000.00 40.0%	\$470.00 45.9%	\$160.00 40.0%	\$525.00 52.6%	\$5,155.00 41.8%	8:00:00
Zone 1 - Home Theater	\$10,234.95 40.4%	\$618.33 47.2%	\$105.00 41.0%	\$1,214.95 42.8%	\$12,173.23 41.0%	9:05:00
Zone 2 - Living Room	\$9,142.00 42.7%	\$925.00 47.0%	\$95.00 40.0%	\$2,271.75 40.1%	\$12,433.75 42.5%	14:52:30
Zone 3 - Office	\$7,743.99 39.0%	\$722.50 47.4%	\$105.00 41.0%	\$1,218.70 43.6%	\$9,790.19 40.2%	11:22:30
Zone 4 - Dining Room	\$1,095.00 40.0%	\$342.50 45.1%	\$288.33 40.3%	\$312.50 56.8%	\$2,038.33 43.5%	5:40:00
Zone 4 - Kitchen	\$1,095.00 40.0%	\$342.50 45.1%	\$288.33 40.3%	\$312.50 56.8%	\$2,038.33 43.5%	5:40:00
Zone 5 - Master Bedroom	\$229.95 50.0%	\$460.00 45.4%	\$366.67 40.0%	\$277.50 64.9%	\$1,334.12 48.7%	7:45:00
Zone 5 - Master Bathroom	\$6,995.00 40.0%	\$602.50 47.1%	\$105.00 41.0%	\$998.75 44.4%	\$8,701.25 41.0%	9:42:30

Enhancement – Project Manager/Product History: Options

You can now select product history by Client name as well as Project Number and you can sort by all columns.

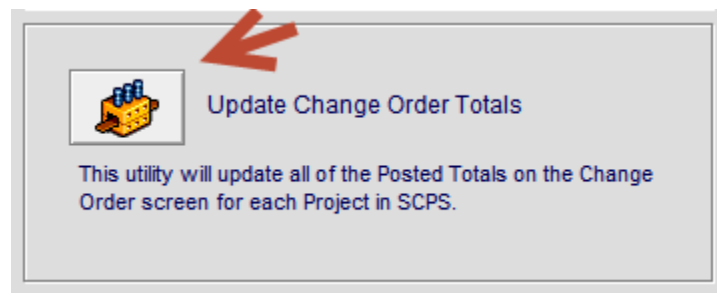


Sort All Products		History of Products Sold						Print	?	Home
Show All Products		Click on Underlined Text to Find or Sort Products in Projects, Completed Projects & Final Change Orders. View/Print Report for total Qty of each product						92 Products	Done	
Date Sold	Project	Client/Company	Make	Model	Discipline	Type	Qty	Unit	Sell Price	
8/30/2012	1290.1-1.100	LeRoy Asher	AAAAA	111111	Audio	Integrated Amplifier	2 ea		\$1,000.00	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RC-35	Audio	Center Channel	1 ea		\$399.00	
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RC-35	Audio	Center Channel	1 ea		\$399.00	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RF-35	Audio	Floor	2 ea		\$499.00	
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RF-35	Audio	Floor	2 ea		\$499.00	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RS-7	Audio	Bookshelf	2 ea		\$450.00	
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RS-7	Audio	Bookshelf	2 ea		\$450.00	
4/25/2007	1288.1-1.100	Jim Engandela - Horizon Software	Klipsch	RS-7	Audio	Bookshelf	1 ea		\$427.50	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RSW-10	Audio	Powered	1 EA		\$1,000.00	
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RSW-10	Audio	Powered	1 EA		\$1,000.00	

Enhancement – Project/Current Change Orders: Add & Update CO's

You can now Add New Change Orders to this Project from the Current CO screen. The Update CO Totals will update (repost) the CO Total amounts, for each Change Order. You can also run this utility from the Main Logo screen/Utility screen.

		Master Project - Current Change Orders						Print		? Home	
		John & Mary Smith						This Project		All Projects	
		Home Entertainment System 1284.1-1.100						Add New Change Order to this Project			
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		



Enhancement – Project/Change Orders/Areas & Products: Improve GUI

The GUI for both the Master Project section and the Pending Change Order section has been improved.

Master Project									
John & Mary Smith								CO Status	Done
Home Entertainment System 1284.1-1.100								C = Changed A = Added D = Deleted	
Labor	Parts	Wire							
Pick Area	Location	Zone	Areas	Q	Add Products & Supplements to Area	Change Product Qty	CO Status	Zone 2 - Living Room	Unit Sell Ext Sell
	1	Home Theater				Audio		1 Klipsch : RC-35	\$399.00
	2	Living Room				Speaker : Center Channel	ea	Center Channel Speaker	\$399.00
	3	Office						Shop Notes	
	4	Dining Room				Audio		2 Klipsch : RF-35	\$499.00
	4	Kitchen				Speaker : Floor	ea	Reference Tower Speaker	\$998.00
	5	Master Bedroom						Shop Notes	
	5	Master Bathroom				Audio		2 Klipsch : RS-7	\$450.00
						Speaker : Bookshelf	ea	Reference Surround Speaker	\$900.00
								Shop Notes	
						Audio C		1 Klipsch : RSW-10	\$1,000.00
						Speaker : Powered Subwoofe	ea	Reference Subwoofer	\$1,000.00
								Shop Notes	
						Audio		1 Linn : Classik Movie Di	\$3,995.00
						Amplifier : Surround Receive	ea	Integrated multi-channel DVD-CD	\$3,995.00
								Shop Notes	
Super View	Area Sum	Prod Sum	Pending Change Order				5:37:30	Labor Total	Grand Total
Areas		Text	Products		John & Mary Smith		Equipment \$10,900.00		
Labor		Parts	Wire		Home Entertainment System		Installation \$390.00		
					1284.1c1-1.100		Misc. Parts \$285.00		
					Zone 2 - Living Room Total:		Wire & Cable \$956.25		
							\$12,531.25		
Loc	Zone	Max 40 Characters			No Prompt		Zone 2 - Living Room		
		Pick or Type Area			Area		Products Sets Pure Supplements Tag		
Location	Zone	Sort	Areas	Q	Rename Del	Discipline	Cat:Type	Status	Sort View
	2	m	Living Room			Audio	A	m	Q
						Speaker : Powered Subwoofe	ea	Reference Subwoofer	\$1,000.00
						CO Notes		Shop Notes	
						Audio	A	m	Q
						Speaker : Powered Subwoofe	ea	Aktive isobarik bass extension	\$9,900.00
						CO Notes		Shop Notes	

Enhancement – Project/Change Orders/Master Project Labor, Parts & Wire Supplements

In the Change Order module you can now view the Master Project Labor, Parts & Wire Supplements. Currently if you want to Change just a Supplement on a Product, you first Change the Qty of the associated Product and then add that Product into the CO and then modify the Supplements. The Change Supplement Qty button is under development and when it is released you will be able to directly change the Qty of a Supplement from these screens.

Change Order - Master Project View - Labor Supplements										
Master Project			John & Mary Smith			Degree of Difficulty		Done		
Labor			Home Entertainment System			1 - Prewire 0%				
Parts			1284.1c1-1.100			2 - Trim 0%				
Wire						3 - Final 0%				
All Areas			Labor Supplements			Labor Total		5:37:30 \$390.00		
Labor assigned to			Change Labor Qty			Sort				
Zone-Area	Qty	Make - Model	Change Labor Qty	Labor Type		Tax A B	Install Phases	Ext Labor Time (h:m:s)	Hourly Rate	Ext Sell
1 - Home Theater	1	Linn : 5101 Personal Handset		Programming		T T	3	0:00:00	\$80	\$40.00
1 - Home Theater	1	Linn : 5101 Personal Handset		Calibration		T T	3	0:00:00	\$100	\$33.33
1 - Home Theater	1	Linn : 5101 Personal Handset		Wire Labor - Bulk		T T	1	1:15:00	\$60	\$75.00
1 - Home Theater	1	Linn : 5125		Installation		T T	3	0:00:00	\$60	\$60.00
1 - Home Theater	1	Linn : 5125		Wire Labor - Precut		T T	3	0:00:00	\$60	\$20.00
1 - Home Theater	1	Linn : Classik Music-S		Installation		T T	3	0:00:00	\$60	\$30.00
1 - Home Theater	1	Linn : Classik Music-S		Wire Labor - Precut		T T	3	0:00:00	\$60	\$5.00
1 - Home Theater	5	Linn : Katan		Installation		T T	3	0:00:00	\$60	\$100.00
1 - Home Theater	5	Linn : Katan		Wire Labor - Bulk		T T	1	3:07:30	\$60	\$187.50
1 - Home Theater	1	Linn : Klimax Chakra 500		Installation		T T	3	0:00:00	\$60	\$60.00

Enhancement – Project/Change Orders/Print Menu: Print CO with Supplements

In addition to the regular Print Change Order, you can now Print the Change Order with 6 new formats, by Discipline, Area or Phase, with the Labor, Parts and Wires showing below each Product, or only the Parts and Wires showing below each Product (with a pop up option).

Printer Setup	Pending Change Order - Print Menu Options	Print All	?
Print CO by Discipline with Supps	John & Mary Smith	Print Change Order	Done
Print CO by Area with Supps	Home Entertainment System	Print Overviews	Other Reports
Print CO by Phase with Supps	1284.1c1-1.100	Print Fees	
Printer: PDF reDirect Pro v2, winspool, Ne01:		CO: c1 CO Title: Home Entertainment System	

Change Order
 Pending CO Title
 Entering a title will override the default title for this CO and will not affect the Master Project title.

☐ Show Original Area Text in addition to the CO Area Text
☐ 9/5/2012 Report Date - Lock

Areas & Products Report
☒ Yes ☐ No Page Break after each Area
☐ Products - Do Not show products by Discipline
☐ Products - Show Product Install Location
☐ Text - Hide Area Text
☐ Text - Show only Area Text - No Products

Product Listing

Areas & Products Pricing
Show 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

Pending Change Order
1284.1c1-1.100



Date
9/5/2012

Home Entertainment System
Change Order
for
John & Mary Smith

Zone - Area

Master Change Order by Area

Discipline

Make - Model - Description

Labor Part Wire

Qty Unit Price Ext Price

Zone 2 - Living Room

Audio

Klipsch : RSW-10 : Reference Subwoofer : Black Ash	1 ea	\$900.00	\$900.00
Installation	0:30 (h:m)	\$60.00	\$30.00
Calibration	0:30 (h:m)	\$100.00	\$50.00
Parts Labor	0:15 (h:m)	\$50.00	\$12.50
Wire Labor - Bulk	0:37 (h:m)	\$60.00	\$37.50
Linn - Phono Plugs-Standard - Pack 6 red/6 black	1 ea	\$95.00	\$95.00
Linn : Bulk Analog interconnect : Analog interconnect	75 ft	\$4.25	\$318.75
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	2 ea	\$4,455.00	\$8,910.00
Installation	1:00 (h:m)	\$60.00	\$60.00
Calibration	1:00 (h:m)	\$100.00	\$100.00
Parts Labor	0:30 (h:m)	\$50.00	\$25.00
Wire Labor - Bulk	1:15 (h:m)	\$60.00	\$75.00
Linn - Phono Plugs-Standard - Pack 6 red/6 black	2 ea	\$95.00	\$190.00
Linn : Bulk Analog interconnect : Analog interconnect	75 ft	\$4.25	\$318.75
Linn : Bulk Analog interconnect : Analog interconnect	75 ft	\$4.25	\$318.75

Master Change Order by Area

Zone - Area

Discipline

Make - Model - Description

Labor Part Wire

Qty Unit Price Ext Price

Electronics & Installation

Equipment	\$9,810.00
Installation	\$390.00
Misc. Parts	\$285.00
Wire & Cable	\$956.25
Additional Fees	\$530.89
Total	\$11,972.14
Tax	\$629.27
Grand Total	\$12,601.41

Prices quoted are guaranteed until: 10/29/2012

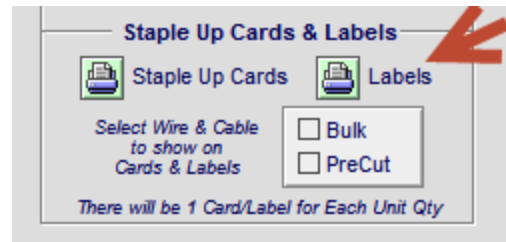
Payment Terms

Payment 1 Due 10 days before the installation final phase \$12,601.41

Client approval signature _____ Date _____

Enhancement – Project/Print Menu/Shop: Staple Up Labels

You can now print Labels for each Product in a Project from the Project/Print Menu/Shop Print Menu. Please use Avery 5160 Labels or the equivalent. Remember that the Print Staple Up card option will need to be checked on the Products in your Product Library. You can check the option automatically for all of your products by using the Product Library/Utility/Update screen utility.



Tom Burke - Sunbelt Business Brokers
1290.1-1.100
Zone 1 - Home Theater
Linn
5125

Tom Burke - Sunbelt Business Brokers
1290.1-1.100
Zone 1 - Home Theater
Linn
Katan

Tom Burke - Sunbelt Business Brokers
1290.1-1.100
Zone 1 - Home Theater
Linn
Katan

Tom Burke - Sunbelt Business Brokers
1290.1-1.100
Zone 1 - Home Theater
Linn
Melodik

Tom Burke - Sunbelt Business Brokers
1290.1-1.100
Zone 1 - Home Theater
Linn
Katan

Tom Burke - Sunbelt Business Brokers
1290.1-1.100
Zone 1 - Home Theater
Runco
CL-810

Enhancement – Product Library/List screens: Colored products

Lightly colored product lines improve clarity.

[illegible]

Enhancement – Product Library/Utility/Export Products

Fine Tune Product Export routine for easier usage and reset Export Field Map.

Show All		Printer Setup		Product Library - Export Products Utility					Print List								
Show Products		Click buttons 1-6 to Select & Export desired Products										Done					
Part	Phantom			1 Update Make List		2 Show Make List		3 Omit Undesired Makes		4 Show Product List		5 Omit Undesired Products		6 Export 126 Products		126 Items 4,751 Total	
Bulk	PreCut																
Show All Groups		3 Omit Makes		5 Omit Products		Discontinued											
Disclin	Cat	Type	Class	+	Make	+	Model	SKU	Description	Finish		Sell Price	Hidden	+			
Equip					AT & T		249	: 1030482	Cordless Phone			14.99 ea					
Equip					Atlas Sound		76-8E2	: 1190177	8" Mounting Rings			13.00 ea					
Equip					Audioaccess		AARIF55	: 1250260	Pre-Construction Kit			24.99 ea					
Equip					AudioSource		AMP 5.1A	: 5200646	Monoblock Amplifier			179.95 ea					
Equip					Audiovox		D1718	: 5500142	Portable DVD Player			119.99 ea					
Equip					Avaya		3204-EBY	: 9010219	Battery for Transtalk			69.88 ea					
Equip					Backboxx		BACKBOXX	: 1060608	Speaker Surround			667.20 ea					

Enhancement – Product Library/Product Detail: Installed Costs

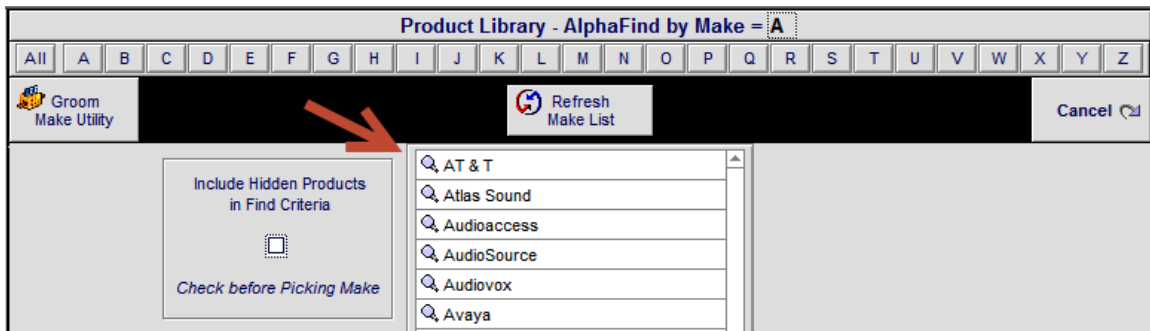
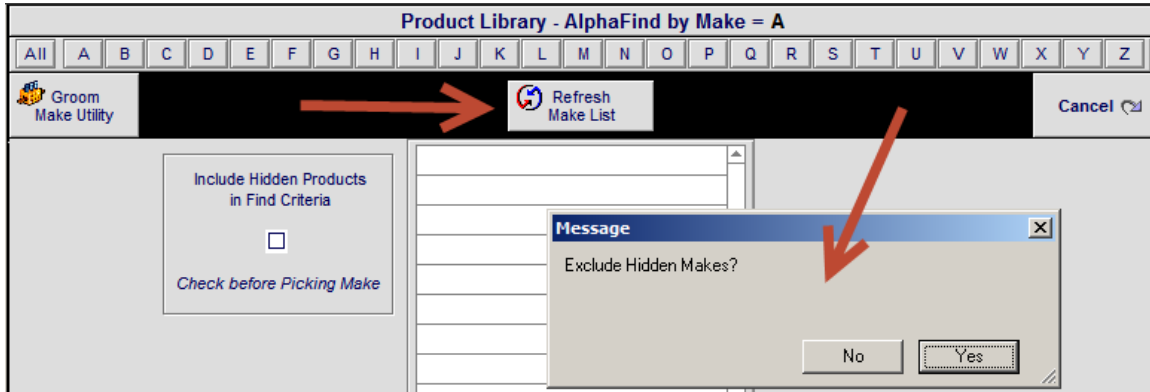
The Installed Price GP% has been added to the Product Detail screen. You can also click on the View icon for an expanded view of the Installed Cost of the Product, Parts, Wire and Labor for a Product.

Product		Supplements		Installed Price	
Product		Parts		Product	\$390.00
\$390.00		\$1,085.00		Parts	\$1,085.00
\$610.00		\$50.00		Wire	\$1,312.50
\$1,000.00		\$1,135.00		Wire	\$1,312.50
				+ Labor	\$862.50
				Total	\$3,650.00
				GP	43.3%

Product Library - Product Detail - Cost									
1 of 133									
<div> Linn 5101 Personal Handset Universal learning remote Audio : Multi-room : Keypad </div>									
<div> <div> Product </div> <div> Make Linn Model 5101 Personal Handset QB Item Finish Black Description Universal learning remote Features Programmable, high-power, long range, infra-red remote control for hand held or table top operation </div> <div> Group Audio : Multi-room : Keypad Class Product Phase 2 Trim </div> </div>									
<div> <div> Unit ea Product Loaded Sell \$390.00 Cost \$234.00 GP% 40.0% </div> <div> Product \$390.00 Parts \$1,085.00 Wire \$1,312.50 Labor \$862.50 Linn : 5101 Personal Handset - Installed Total \$3,650.00 </div> <div> Cost \$234.00 \$649.00 \$733.50 \$454.38 \$2,070.88 </div> <div> GP% 40.0% 40.2% 44.1% 47.3% 43.3% </div> </div>									

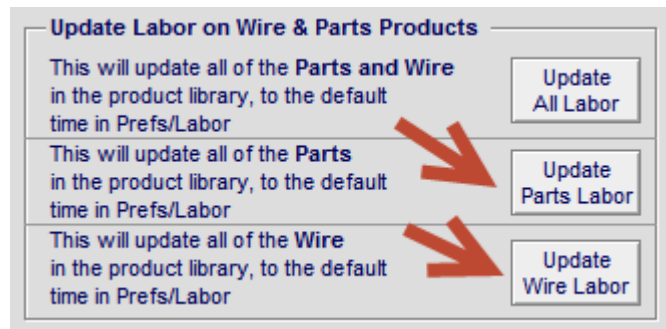
Enhancement – Product Library/Alpha Finder option to Show or Not Show Hidden Makes

You now have the option to show Makes from Hidden products or to exclude them from the Make list. A View icon has also been added to Make list.



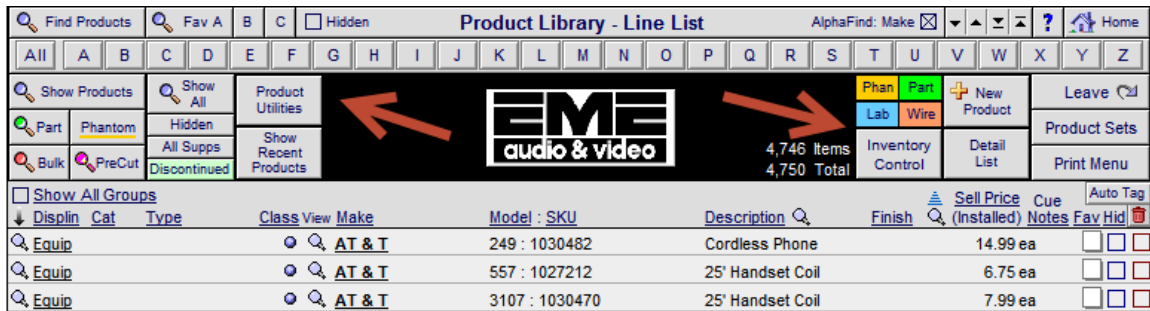
Enhancement – Product Library/Utility: Update Labor

You now have the flexibility to Update All Labor on your Products or only the Labor on Parts or Wire.



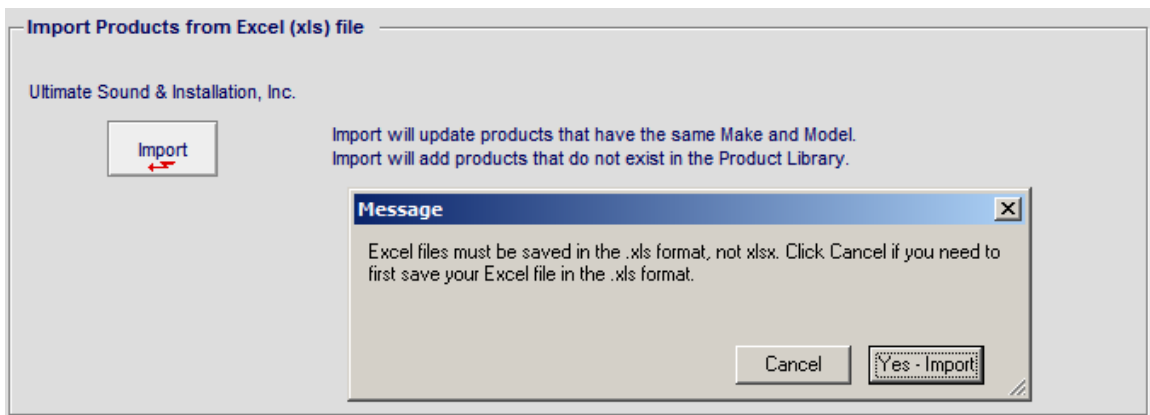
Enhancement – Product Library: Buttons are unified on all screens

Buttons are unified on all screens to improve clarity.



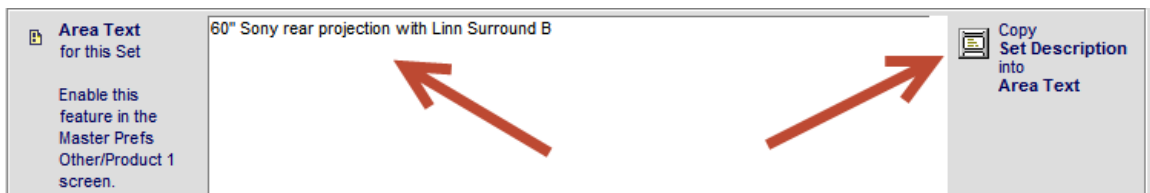
Enhancement – Product Library/Utility/User Import: Reset Field Map for new Excel Template

The Import Routine and field map has been reset for the new Ultimate Excel Template. The Excel template needs to be saved (formatted) as a .xls file, not a .xlsx file. Products that already exist in the SCPS product library will be updated. New Products that do not exist in the SCPS product library will be added.



Enhancement – Product Set Library/Utility

You can now easily copy the Set Description into the Area Text field using this Copy button.



Fix – Proposal/Product/Labor Supplements: Not adding Labor into Area Subtotals

Under some conditions the Labor Supplements added to a Proposal Product is not adding into the Area Subtotal, although it is adding into the Grand Total and Contract. This has been fixed.

Delete All Labor

Primary Phase: 3 Final

Proposal - Product Detail - Labor Supplements

1 of 1

?

Home

Areas

Text

Products

Labor

Parts

Wire

Tasks

LeRoy Asher

1297.1-1.100

aaaaa : 111

Equipment : :

Alt Labor View

Labor Sub Cats

Proposal Detail

Prev

Next

Products

Specs

Pix - PDF's

Labor

Parts

Wire

Tasks

2 - Bathroom 4

Refresh

+

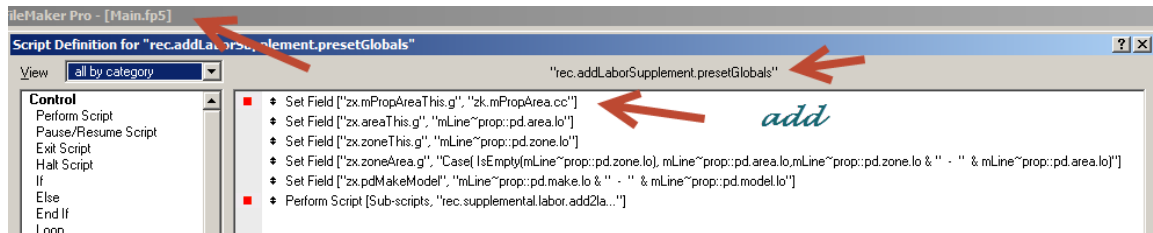
Add Labor Supplement

All Phases (1+2+3) Grand Total

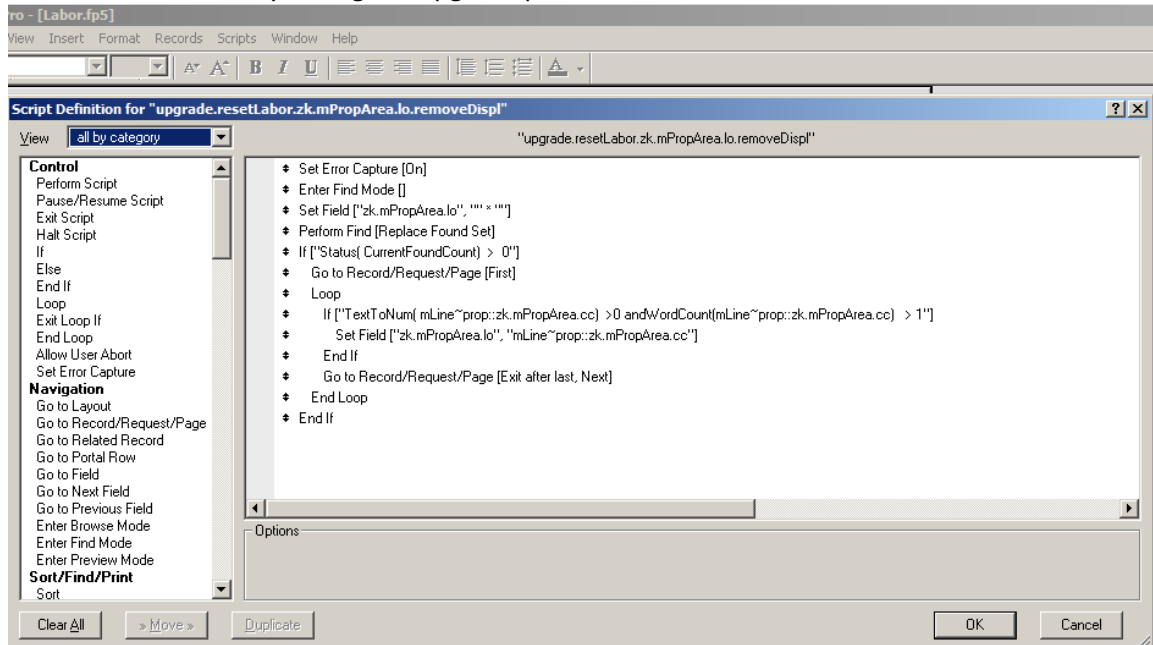
Extended Qty = 1 ea

up dn

Labor Type	Cost	Sell		Time		Cost		Sell	
				Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD
1 - Installation	\$30.00	\$60.00	<input type="checkbox"/>	0:45:00	0:45:00	\$22.50	\$22.50	\$45.00	\$45.00
2 - Programming	\$40.00	\$80.00	<input type="checkbox"/>	6:00:00	6:00:00	\$240.00	\$240.00	\$480.00	\$480.00
3 - Training	\$50.00	\$100.00	<input type="checkbox"/>	0:15:00	0:15:00	\$12.50	\$12.50	\$25.00	\$25.00
(Phase 1+2+3) Grand Total:				7:00:00	7:00:00	\$275.00	\$275.00	\$550.00	\$550.00



Fix Legacy Data improperly stamped from the above issue. This routine is built in the upgrade and runs automatically during the upgrade process.



Fix – Proposal/Project/Change Order: Payment Screen - Refresh Screen Totals

In order to insure the totals on the Payment Terms screen are refreshed on Workstations, an automatic Screen Refresh has been embedded into the navigation routines that bring you to this screen in Proposals, Projects and Change Orders. In addition to this, a Manual refresh button is available on screen and from the pull down Script menu.

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

Dealer Payment Plans **LeRoy Asher** Done with Update

Home Entertainment System 1292.1-1.100 Installation Type New-3 Phase Pre-Trim-Final

Installation Type — Reset Payment Method Percentage

Payment Labels	Payment Steps				
	Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback
Payment Description	Deposit	Payment 1	Payment 2	Payment 3	Hold Back
	Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.
Percentage Total: 100%	10 %	30 %	20 %	30 %	10 %
Total Payments: \$11,652.25	Amount \$1,165.23	Amount \$3,495.68	Amount \$2,330.45	Amount \$3,495.68	Amount \$1,165.23

Payment Step Director

	Step 1	Step 2	Step 3
Payment Director	1	2	3
Products	1	2	3
Labor	1	2	3
Parts	1	2	3
Wire	1	2	3
Fees	1	2	3

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

Totals Update

Proposal	\$11,652.25
- Payments	\$11,652.25
Difference Must = \$0	\$0.00

Scripts Window Help

ScriptMaker..

Debug Scripts

dev.refreshScreen Ctrl+1

Fix – Product Library/Find Product: Group Category and Type Hierarchal popup lists

The Category and Type Pop Up lists now reflect the Hierarchal selections. So when you select a Discipline... the Category only shows those for that Discipline. When you select a Category ...the Type only shows those for that Category. Also, Clear icons that clear the Find Fields in each section have been added to this screen.

Product Library - Find Products

Enter find criteria and click the Done/Find button

Find with more Criteria

Cancel

Done Find

Pick Make

Find Multiple Makes

Refresh Make List

Make Pop Up List

Pick Make

AT & T

Atlas Sound

Fast Find

Enter Make Model Description

Enter Model

Enter SKU

Pick Model

Product Groups

First select Discipline, then Category, then Type

Discipline > Category > Type

Pick a White Group (gray groups do not have products)

Audio	Amplifier	Integrated Amplifier
Audio	Amplifier	Multi-channel
Audio	Amplifier	Preamplifier
Audio	Amplifier	Single Channel
Audio	Amplifier	Small Amp

Dup New Value List for Category

Define Value Lists for "Product.fp5"

Value lists provide predefined lists for data entry, data validation and sorting.

103 value list(s)

View by: custom order

Value List Name	Source	Values
pref.v~zu.prodDC.m	From Another File	List: "0 c~prodDC", File: "Prefs.fp5"
pref.v~zu.prodDimensions.m	From Another File	List: "0 c~prodDimensions", File: "Prefs.fp5"
pref.v~zu.prodFinish.m	From Another File	List: "0 f~zu.prodFinish.m", File: "Prefs.fp5"
pref.v~zu.prodLoadingAmt.m	From Another File	List: "0 c~prodLoadingAmt", File: "Prefs.fp5"
pref.v~zu.prodLoadingPot.m	From Another File	List: "0 c~prodLoadingPot", File: "Prefs.fp5"
pref.v~zu.prodMHeight	From Another File	List: "0 f~zu.prodMHeight.m", File: "Prefs.fp5"
pref.v~zu.prodQty	From Another File	List: "0 c~prodQty", File: "Prefs.fp5"
pref.v~zu.prodQty.m	From Another File	List: "0 c~prodQty", File: "Prefs.fp5"
pref.v~zu.prodQty+	From Another File	List: "0 c~prodQtyPosNeg2", File: "Prefs.fp5"
pref.v~zu.prodRackSpaces.m	From Another File	List: "0 c~prodRackSpaces", File: "Prefs.fp5"
pref.v~zu.prodStatus.m	From Another File	List: "0 c~prodStatus", File: "Prefs.fp5"
pref.v~zu.prodUnit.m	From Field	Field: "zu.prodUnit.m", File: "Prefs.fp5"
pref.v~zu.prodUnitCpower.m	From Another File	List: "0 c~prodUnitCpower", File: "Prefs.fp5"
pref.v~zu.prodUnitCpower.m	From Another File	List: "0 c~prodUnitCpower", File: "Prefs.fp5"
pref.v~zu.prodWeight.m	From Another File	List: "0 c~prodWeight", File: "Prefs.fp5"
pref.v~zu.taskCuedays.m	From /	
pref.v~zu.taskPriority.m	From /	
pref.v~zu.unifMHeight.m	From /	
pref.v~zu.wam.m	From /	
pref.v~zu.wamExt.m	From /	
prodTaskOwner	From /	
prodCo.NumName	From /	
VE	From /	
wire.f~pd.dept	From F	
wire.f~vi.quality	From F	
wire.f~vi.type	From F	
wire.one.r~prodGroup	From F	
wire.r~dept:pd.category.lo	From F	
wire.r~dept:pd.type.lo	From F	
wire.r~prod~prodKind	From F	
wire.r~zk~dept:pd.category.lo	From F	
wire.r~zk~zk.prodDeptCateg.c:pd.type	From F	
wire.v~model	From /	
wire.v~prodDept	From /	
wire~prodKind:zk.wire.p	From Relationship	Field: "wire~prodKind:zk.wire.p"
0.r~zk~zk.prodDeptCateg.c:pd.type	From Relationship	Field: "zk~zk.prodDeptCateg.c:pd.type"
0.r~zk~zk.prodDeptCateg.c:pd.cate...	From Relationship	Field: "zk~zk.prodDept~pd.dept:pd.category"

New... Edit... Duplicate Delete

Specify Fields for Value List "0.r~zk~zk.prodDeptCateg.c:pd.cate..."

Use values from a field:

All values: Specify File... "Product.fp5"

Only related values: "zk~zk.prodDept~pd.dept"

Use values from this field:

Also display values from:

Sort value list by: first field second field

OK Cancel

Reconnect Cat field to this Value list

Reconnect Type field to this Value list

Define Value Lists for "Product.fp5"

Value lists provide predefined lists for data entry, data validation and sorting.

103 value list(s)

View by: custom order

Value List Name	Source	Values
pref.v~zu.prodDC.m	From Another File	List: "0 c~prodDC", File: "Prefs.fp5"
pref.v~zu.prodDimensions.m	From Another File	List: "0 c~prodDimensions", File: "Prefs.fp5"
pref.v~zu.prodFinish.m	From Another File	List: "0 f~zu.prodFinish.m", File: "Prefs.fp5"
pref.v~zu.prodLoadingAmt.m	From Another File	List: "0 c~prodLoadingAmt", File: "Prefs.fp5"
pref.v~zu.prodLoadingPot.m	From Another File	List: "0 c~prodLoadingPot", File: "Prefs.fp5"
pref.v~zu.prodMHeight	From Another File	List: "0 f~zu.prodMHeight.m", File: "Prefs.fp5"
pref.v~zu.prodQty	From Another File	List: "0 c~prodQty", File: "Prefs.fp5"
pref.v~zu.prodQty.m	From Another File	List: "0 c~prodQty", File: "Prefs.fp5"
pref.v~zu.prodQty+	From Another File	List: "0 c~prodQtyPosNeg2", File: "Prefs.fp5"
pref.v~zu.prodRackSpaces.m	From Another File	List: "0 c~prodRackSpaces", File: "Prefs.fp5"
pref.v~zu.prodStatus.m	From Another File	List: "0 c~prodStatus", File: "Prefs.fp5"
pref.v~zu.prodUnit.m	From Field	Field: "zu.prodUnit.m", File: "Prefs.fp5"
pref.v~zu.prodUnitCpower.m	From Another File	List: "0 c~prodUnitCpower", File: "Prefs.fp5"
pref.v~zu.prodUnitCpower.m	From Another File	List: "0 c~prodUnitCpower", File: "Prefs.fp5"
pref.v~zu.prodWeight.m	From Another File	List: "0 c~prodWeight", File: "Prefs.fp5"
pref.v~zu.taskCuedays.m	From /	
pref.v~zu.taskPriority.m	From /	
pref.v~zu.unifMHeight.m	From /	
pref.v~zu.wam.m	From /	
pref.v~zu.wamExt.m	From /	
prodTaskOwner	From /	
prodCo.NumName	From /	
VE	From /	
wire.f~pd.dept	From F	
wire.f~vi.quality	From F	
wire.f~vi.type	From F	
wire.one.r~prodGroup	From F	
wire.r~dept:pd.category.lo	From F	
wire.r~dept:pd.type.lo	From F	
wire.r~prod~prodKind	From F	
wire.r~zk~dept:pd.category.lo	From F	
wire.r~zk~zk.prodDeptCateg.c:pd.type	From Relationship	Field: "zk~zk.prodDeptCateg.c:pd.type"
wire.v~model	From /	
wire.v~prodDept	From /	
wire~prodKind:zk.wire.p	From Relationship	Field: "wire~prodKind:zk.wire.p"
0.r~zk~zk.prodDeptCateg.c:pd.type	From Relationship	Field: "zk~zk.prodDeptCateg.c:pd.type"
0.r~zk~zk.prodDeptCateg.c:pd.cate...	From Relationship	Field: "zk~zk.prodDept~pd.dept:pd.category"

New... Edit... Duplicate Delete

Specify Fields for Value List "0.r~zk~zk.prodDeptCateg.c:pd.cate..."

Use values from a field:

All values: Specify File... "Product.fp5"

Only related values: "zk~zk.prodDept~pd.dept"

Use values from this field:

Also display values from:

Sort value list by: first field second field

OK Cancel

SCPS Version 9.5v4

Released: 8/24/2012

Fix – Proposal/Product/Labor Supplements: Not adding Labor into Area Subtotals

Under some conditions the Labor Supplements added to a Proposal Product is not adding into the Area Subtotal, although it is adding into the Grand Total and Contract. This has been fixed.

Delete All Labor		Primary Phase: 3 Final		Proposal - Product Detail - Labor Supplements				1 of 1		?	Home
Areas	Text	Products		LeRoy Asher 1297.1-1.100				Alt Labor View		Labor Sub Cats	
Labor	Parts	Wire	Tasks	aaaaa : 111 Equipment : :				Prev		Next	
Products		Specs	Pix - PDF's	Labor	Parts	Wire	Tasks	2 - Bathroom 4		Refresh	
Add Labor Supplement		All Phases (1+2+3) Grand Total						Extended Qty = 1 ea		up dn	
Labor Type	Cost	Sell		Time		Cost		Sell			
				Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD	Unit w/DOD	Ext w/DOD		
1 - Installation	\$30.00	\$60.00	<input type="checkbox"/>	0:45:00	0:45:00	\$22.50	\$22.50	\$45.00	\$45.00		
2 - Programming	\$40.00	\$80.00	<input type="checkbox"/>	6:00:00	6:00:00	\$240.00	\$240.00	\$480.00	\$480.00		
3 - Training	\$50.00	\$100.00	<input type="checkbox"/>	0:15:00	0:15:00	\$12.50	\$12.50	\$25.00	\$25.00		
(Phase 1+2+3) Grand Total:				7:00:00	7:00:00	\$275.00	\$275.00	\$550.00	\$550.00		

Records: Add

Script Definition for "rec.addLaborSupplement.presetGlobals"

View: all by category

Control

- Perform Script
- Pause/Resume Script
- Exit Script
- Halt Script
- If
- Else
- End If
- Loop

Script Definition for "rec.addLaborSupplement.presetGlobals"

- Set Field ["zx.mPropAreaThis.g", "zx.mPropArea.cc"]
- Set Field ["zx.areaThis.g", "mLine~prop:pd.area.lo"]
- Set Field ["zx.zoneThis.g", "mLine~prop:pd.zone.lo"]
- Set Field ["zx.zoneArea.g", "Case(IsEmpty(mLine~prop:pd.zone.lo), mLine~prop:pd.area.lo, mLine~prop:pd.zone.lo & " - " & mLine~prop:pd.area.lo)"]
- Set Field ["zx.pdMakeModel", "mLine~prop:pd.make.lo & " - " & mLine~prop:pd.model.lo"]
- Perform Script [Sub-scripts, "rec.supplemental.labor.add2la..."]

add

SCPS Version 9.5v3

Released: 8/19/2012


Fix – Proposal/Areas & Products: Picking Sets – Return to correct proposal and CO

When Picking Product Set into a Proposal, although the Set Products get entered into the right, the user is returned to the wrong screen.

SCPS 9.5v2 was not the right fix and users on SCPS 9.5v2 should have the 2 changed scripts put back to the original state.

```
!Sets[subs]"
"rec.pickProdSets[subs]"


+ If ["0"]
+   Show Custom Dialog ["", "aaa.test.t.c"]
+   Show Custom Dialog ["", "zx.pickProdOrSet.g"]
+   Set Field ["set~one::zx.mProp.g", "zk.mProp.p"]
+ End If
+ Freeze Window
+ Go to Related Record ["set~one"]
+ Set Field ["set~one::zx.mPropArea.g", "zx.mPropArea.g"]
+ Set Field ["set~one::zx.pickArea.g", "zx.zoneArea.g"]
+ Set Field ["set~one::zx.pickSetNot.g", "0"]
+ Set Field ["set~one::zx.setAreaTextadd.g", ""]
+ If ["Status(CurrentLayoutName) = "areaProdPort" or Status(CurrentLayoutName) = "coPort"]
```



*Main
remove*

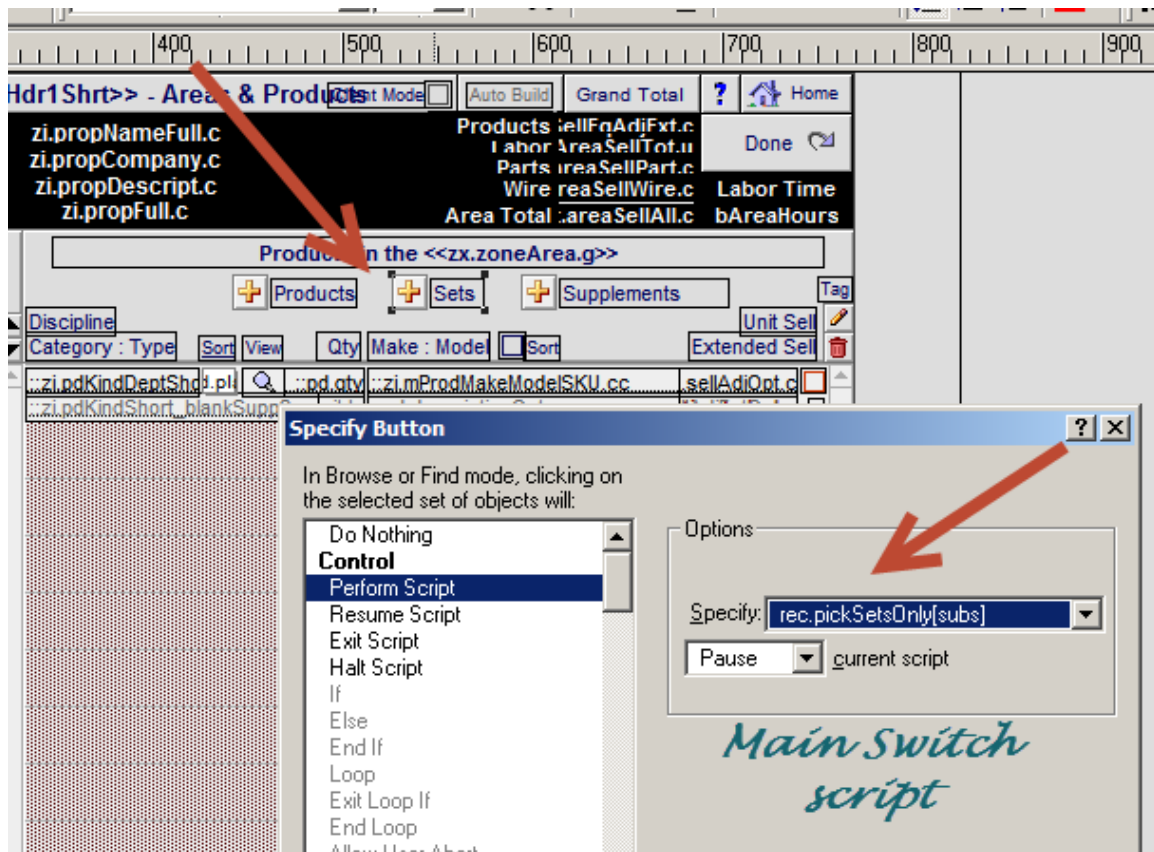
```
"nav.layoutThis i

+ Perform Script [Sub-scripts, <unknown>]
+ Set Field ["mTot~zx~zk.mPropArea::zt.are...", "mTot~zx~zk.mPropArea::zt.are...sellLab.cp"]
+ Go to Layout [Refresh window, "zx.layoutThis.g"]
+ Set Field ["zx.layoutNameThis.g", "Status( CurrentLayoutName)"]
+ If ["zx.layoutNameThis.g = "coPort"]
+   Go to Related Record [Show, "~mProp"]
+   Go to Record/Request/Page [First]
+   Set Field ["zx.mProp.g", "prod~one::zxk.mProp.g"]
+   Set Field ["zx.mPropArea.g", "zx.mProp.g & "" & zx.areaThis.g"]
+ End If
+ If ["0"]
+   Set Field ["mTot~zx~zk.prop::prop.area.text", "set~one::zx.setText.g"]
+ End If
```




*main
move
back*

Instead this script should be connected to this button and the rev changed to v3.



Freeze Window

```
Set Field ["zx.prodPickOrAdd.g", ""pick'"]
If ["0 and not IsEmpty(mLine~prop::zk.mProd.f)"]
  Perform Script [Sub-scripts, "trap.noChangeMasterProd [layo..."]
End If
Set Field ["prod~one::zx.area.g", "zx.areaThis.g"]
Set Field ["prod~one::zx.propNumID.g", "zi.propFull.c"]
Set Field ["prod~one::zxk.mProp.g", "zk.mProp.p"]
Set Field ["zx.mProd.g", "mLine~prop::zk.mProd.f"]
Set Field ["zx.mProp.g", "zk.mProp.p"]
Set Field ["prod~one::zx.area2.g", "zx.zoneArea.g"]
Delete Record/Request [No dialog]
If ["Status(CurrentFoundCount) = 0"]
  Go to Layout ["prodLineList"]
  Perform Script [Sub-scripts, "nav.propMainDetail [trap] [po..."]
End If
Go to Layout ["fastOpen"]
If ["zx.pickProdOrSet.g = "prod'"]
  Perform Script [Sub-scripts, "ops.windowHide [macOnly]"]
  Set Field ["zx.pickProdOrSet.g", ""]
  #script: recx.pickProductsPart2
  Perform Script [Sub-scripts, External: "Product.fp5"]
Else
  If ["zx.pickProdOrSet.g = "set'"]
    Perform Script [Sub-scripts, "ops.windowHide [macOnly]"]
    Set Field ["zx.pickProdOrSet.g", ""]
    #script: recx.pickSets [part1]
    Perform Script [Sub-scripts, External: "ProdSet.fp5"]
  End If
End If
```



*make
sure
main
no show
all*

Active Scripts:

```
rec.pickProdSets[subs] (back to normal) ( Main.fp5 )
rec.pickProdSets[subs] (back to normal) ( Main.fp5 )
recx.pickProductsOrSets [part1,xsubs Product] ( Main.fp5 )
```

SCPS Version 9.5v2

Released: 8/15/2012

Fix – Proposal/Areas & Products: Picking Sets – Return to correct proposal and CO

When Picking Product Set into a Proposal, although the Set Products get entered into the right Proposal, the routine returns you to the a different Proposal. This has been corrected.

'rec.pickProdSets[subs]'

✦ If ["0"]

✦ Show Custom Dialog ["" , "aaa.test.t.c"]

✦ Show Custom Dialog ["" , "zx.pickProdOrSet.g"]

✦ End If

✦ Freeze Window

✦ Go to Related Record ["set~one"]

✦ Set Field ["set~one::zx.mProp.g" , "zk.mProp.p"]

✦ Set Field ["set~one::zx.mPropArea.g" , "zx.mPropArea.g"]

✦ Set Field ["set~one::zx.pickArea.d" , "zx.zoneArea.d"]

Main

--Records Pick--

add

v2

'nav.layoutThis'

✦ Perform Script [Sub-scripts, "ops.registerFileName"]

✦ Set Field ["mTot~zx~zk.mPropArea::zt.are..." , "mTot~zx~zk.mPropArea::zt.areaSellLab.cp"]

✦ Go to Layout [Refresh window, "zx.layoutThis.g"]

✦ Set Field ["zx.layoutNameThis.g" , "Status(CurrentLayoutName)"]

✦ Go to Related Record [Show, "~mProp"]

✦ Go to Record/Request/Page [First]

✦ Set Field ["zx.mProp.g" , "prod~one::zxk.mProp.g"]

✦ Set Field ["zx.mPropArea.g" , "zx.mProp.g & "" & zx.areaThis.g"]

✦ If ["zx.layoutNameThis.g = "coPort"]

✦ End If

✦ If ["0"]

✦ Set Field ["mTot~zx~zk.prop::prop.area.text" , "set~one::zx.setText.g"]

✦ End If

Main

---Navigation---

move

v2

SCPS Version 9.5v1

Released: 8/1/2012

Enhancement – Main Logo Screen Buttons: New Arrangement

The module buttons on the Main Logo screen have been arranged for better clarity.



Enhancement – Proposal/Products: Change Discipline on Proposal Products

You can now change the Discipline on a Product once it is added to a Proposal, so you don't have to have multiple like kind products in your Product library for specific disciplines. You can now add the product to the proposal and then change the Discipline.

When you change the discipline on a Product all of its supplements will have their Disciplines changed as well. The Supplements will still be the supplements from the Group the Product was originally assigned to, but their Disciplines will be changed.

You can change the Discipline on a Product from either the Proposal/Product Line list or the Proposal/Product Detail screen.

Super View		Area Sum		Prod Sum		Proposal - Products										Client Mode <input type="checkbox"/>				?		Home					
Areas		Text		Products		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100										Phantom = <input type="checkbox"/>		Update All Products		Auto Price Adjuster		Done					
Labor		Parts		Wire		Tasks		Show All												Install Location Notes		Switch Many Products		Delete All Options		Product Total \$36,925.89	
No Disc't		View		Zone - Area		Make		All 25 Products										Product Labor		Unit List		Adjusted Sell		Extended Sell			
Exclude \$		Switch		Discipline		Category		Model										Parts Labor		Unit Cost		Unit Sell		Ext Installed			
				Phase		Type		Description										Wire Labor		Updated Sell		GP%		Ext Discount			
				Change Group																							
1 ea				Atrium		Linn		5101 Personal Handset										862.50				390.00		390.00			
				Audio		Multi-room		Universal learning remote :										1,085.00		234.00		390.00		1,252.50			
				2 1267.1		Keypad		Black										1,312.50		6/2/2011		40.0%					
1 ea				1 - Home Theater		Runco		CL-610										110.00				7,995.00		7,995.00			
				Video		Display		DLP Projector												4,797.00		7,995.00		8,105.00			
				3 1267.1		DLP Video Projector												99.95		6/2/2011		40.0%					
1 ea				1 - Home Theater		Sony		DVP-NS999ES										35.00		1,199.95		1,099.95		1,099.95			
				Video		Source		Progressive Scan DVD												620.40		1,099.95		1,134.95			
				3 1267.1		DVD Player		Black										120.00		6/2/2011		43.6%		-100.00			

Delete Product		Client Mode <input type="checkbox"/>		Proposal - Product Detail						1 of 25		Home	
				Jim Engandela Horizon Software 1267.1-1.100								Proposal Detail	
				Linn : 5101 Personal Handset Automation : Multi-room : Keypad								Prev Next	
Product		Specs		Pix - PDF's		Labor		Parts		Wire		Tasks	
Qty 1		Make Linn		Sell Price \$390.00 ea				Group Automation : Multi-room : Keypad		Change Group		Original Group Audio	
Model 5101 Personal Handset		SKU		Finish Black		Description Universal learning remote		Product Classification Product		Primary Install Phase 2 Trim		Tax A T + Tax B T	
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						Do not Discount <input type="checkbox"/>		Product Sort m		Exclude \$ from Totals <input type="checkbox"/>	
								Show Product as Option <input type="checkbox"/>		Staple Card <input type="checkbox"/>		Purchasing Lead Days 7	
								Vendor Linn Products					

Proposal - Change Proposal - Product & Supplements Discipline	
<div> <div> <div>Jim Engandela Horizon Software</div> <div>1267.1-1.100</div> <div>Linn : 5101 Personal Handset</div> <div>Audio : Multi-room : Keypad</div> </div> <div>Cancel</div> </div>	
<div>Original Discipline</div> <div>Audio</div> <div> <div>Select New Discipline</div> <div>This Discipline List can be modified in the Master Prefs/Lists/Proposal screen.</div> <div>Supplements attached to this Product will be assigned this new Discipline, but will retain the values of the Group the Originally belonged to.</div> <div>Automation</div> <div>Done</div> </div>	

The Discipline pop up list is populated with Disciplines from all of the Product Groups in Master Preferences. In addition to these, you can manually enter more Disciplines to choose from on the Master Prefs/Lists/Proposal screen.

Lists are auto alphabetized

Master Prefs - Value Lists - Proposals ? Home

Users Proposals Projects Products Payments Purchasing Invoices Tracker Labor Contacts POS Done

Proposal Title

Audio Distribution System
Audio System
Central Vacuum System
Commercial Security System
Custom Audio & Video System
Home Automation
Home Electronics System
Home Entertainment System
Home Music System
Home Security System
Home Theater System
Integrated Electronic System
Lighting Control System
Music Distribution System
Satellite System
Security System
Sound Reinforcement System
Telephone System
Video Distribution System
Video System
Whole House Music System

Default Title
Home Entertainment System

Proposal Areas

Atrium
Attic
Balcony
Basement
Bathroom 1
Bathroom 2
Bathroom 3
Bathroom 4
Bathroom 5
Bathroom 6
Bedroom 1
Bedroom 2
Bedroom 3
Bedroom 4
Bedroom 5
Bedroom 6
Boat House
Breakfast Room
Breezeway
Bungalow
Computer Room
Cottage
Deck
Deck 1st Floor
Deck 2nd Floor
Deck 3rd Floor
Den
Dining Room

Proposal Disciplines

When Adding a Pure Supplement to a Proposal you can assign it to a Product Discipline.
Add to the Product Library Disciplines by entering Additional Disciplines.

Update

Pop Up Discipline List from Product Groups

Audio
Automation
Furniture
Lighting
Telecom
Video
Wire & Cable
Security

Additional Disciplines

Security

Enhancement – Proposal/Fees: Show or Hide Fees Directed to Parts & Labor Subtotals

You can now display, on the Proposal Fees Report, the Project Fees directed to the Parts Subtotal and the Services Fees directed to the Labor Subtotal. The Labels for these totals are also user definable. Setup your Master Preferences/Fees defaults for new Proposals. Existing Proposals will automatically show these totals on the Fees Report unless you check the Hide boxes in the Proposal Fees or Proposal Print Options screens. The Custom Proposal Reports Version 9.5v1 also contains this new Fees display. Contact Horizon if you are using an older version of the Custom Proposal Reports.

Additional Fees

Project Management

\$192.75

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

Subtotal **\$192.75**

Technical Services Fees

Audio Distribution Diagram

\$15.00

Audio Distribution Diagram text With such an important decision it is wise to listen to the best sound systems available before you make your choice and decide what you wish to buy. Whether you simply want to select a stand-alone hi-fi or define a full home theatre sound system or when you want to enjoy the best sound in integrated multi-media entertainment throughout your home, it makes sense to contact Linn and allow us to help you by arranging a demonstration. Because thrilled customers have built our business, you can be sure that you can depend upon the people that Linn recommend to look after you.

Subtotal **\$15.00**

Travel & Expenses

Per Diem-One installer

\$60.00

When overnight stays are required, we charge a flat rate of \$30.00 per diem for each installer. This flat rate is for the cost of meals for our staff members.

Subtotal **\$60.00**

Fees Grand Total **\$267.75**

Misc Service Labor Total: \$15.60
Misc Service Labor Total: \$1,295.00

Tab

Services

Report

Technical Services Fees

Master Prefs - Tech Services Fees

Print

?

Home

Projects

Services

Expenses

Fees can be added to Proposals - Fees should have descriptions for the client
Tech Services Fees will have Qty's assigned them in the Proposal

Done

New

Technical Services Fees

Sort	Tech Services Fee Type	Phase	Edit	Description	Flat Fee Sell Amount	Cost % of Sell	Tax Status A B	Direct to Labor Subtotal
<input type="checkbox"/>	1-Way PHAST Package	1		Control System Design for systems that meet the following criteria: Control of	\$1,295.00	50 %	E E	<input type="checkbox"/>
<input type="checkbox"/>	5.1 Home Theater Audio	3		Calibration of a 5.1 Home Theater Audio System.	\$500.00	50 %	E E	<input checked="" type="checkbox"/>
<input type="checkbox"/>	A/V Cabinet Packaging Design	1		Entertainment Cabinet Packaging Layout Drawing showing critical dimensions,	\$500.00	50 %	E E	<input type="checkbox"/>
<input type="checkbox"/>	AMX Design & Engineering	1		Generation of AMX system wiring diagram to include: Cable Specifications,	\$600.00	50 %	E E	<input type="checkbox"/>
<input type="checkbox"/>	Audio Distribution Diagram	1		Audio Distribution Diagram text With such an important decision it is wise to	\$15.00	50 %	E E	<input type="checkbox"/>
<input type="checkbox"/>	CRT Setup	3		Cathode Ray Tube Projector Setup (4:3, Letterbox, Anamorphic)	\$500.00	50 %	E E	<input type="checkbox"/>
<input type="checkbox"/>	Front Projector Alignment	3		Theater Layout - Front Projected text	\$175.00	50 %	E E	<input type="checkbox"/>

Tax Status Note:
Most Fees are Labor based so the Tax flags should be set accordingly.

Fees Directed to Labor

☐ Hide Label & Fee Amount
Subtotal Label
Misc Service Labor Total:

Existing Proposals will automatically show these totals on the Fees Report unless you check the Hide boxes in the Proposal Fees or Proposal Print Options screens.

Fees Report - Parts and Labor Directed to Fees

☐ Hide - Parts Directed Fees - Label & Amount
☐ Hide - Labor Directed Fees - Label & Amount

Enhancement – Proposal (Project)/Print Menu/Shop: Staging Reports...add Unit Sell

Project Staging reports are now formatted to display the Unit Sell Price.

EME Audio & Video Systems - Confidential Report									
Staging Document - Products									
7/2/2012		Hayes Callahan						Page 1	
Total Qty		Home Theater System							
Sorted by Make-Model		1283.1-1.100							
Phase-Class	Qty	Make-Model-SKU-Finish-Unit Sell				Ck	InStock	OnOrder	Date
3 Final	1 ea	Linn : 5101 Personal Handset : Black				Order	<input type="checkbox"/>		
		Universal learning remote				Rc'vd	<input type="checkbox"/>		
		\$390.00				Stock	<input type="checkbox"/>		
		#				Delivered	<input type="checkbox"/>		
3 Final	1 ea	Linn : 5125 : Silver				Order	<input type="checkbox"/>		
		Five channel power amplifier (Black)				Rc'vd	<input type="checkbox"/>		
		\$2,750.00				Stock	<input type="checkbox"/>		
		#				Delivered	<input type="checkbox"/>		

Enhancement – Project /Purchase Orders: Show PO Number/Name Options

You can now choose to show the SCPS PO Number, the User PO Number and/or the Clients Name on the Printed PO. You can also set a Default for new PO's in the Master Prefs/Other/Project 1 screen. If no selection is made the SCPS PO Number will be displayed.

<input type="checkbox"/> Do not show Client/Project info on PO		<input checked="" type="checkbox"/> Vendor Address		<input checked="" type="checkbox"/> Ship To Address		<input type="checkbox"/> Hide Prices	
PO Number 1081 - 1284.1-1.100 User PO # EME 1234 PO Date 6/2/2011		<input type="checkbox"/> PO Number <input checked="" type="checkbox"/> User PO# <input checked="" type="checkbox"/> Client Name		Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA		EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937	
Buyer: Joe Buyer Buyer Override: Shipping Method: Best Way PO Terms: PO Notes:		1284.1-1.100 John & Mary Smith		PO Total \$234.00		Receiving <input type="checkbox"/> Auto Receive <input checked="" type="checkbox"/> All PO Items Date Received: <input type="text"/> Received By: <input type="text"/>	
<input type="checkbox"/> Global Buy Pkg Off							
Order Qty	Make	Description	Model	Finish	Unit Raw Cost	Ext Raw Cost	
1 ea	Linn	5101 Personal Handset		Black	\$234.00	\$234.00	
1 ea		Universal learning remote		note:			
				<input checked="" type="checkbox"/> Receive Qty 1 <input type="checkbox"/> View-Edit Recvd Qty 0 ea <input type="checkbox"/> Rcv'd: 6/2/2011 By: JE Qty:			

PO Number 1081 - 1284.1-1.100 EME 1234 John & Mary Smith		EME Audio & Video Systems Purchase Order		PO Date 6/2/2011	
Vendor: Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA		Account #:		Ship to: EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937	
Phone (W) 904-645-5242		Fax 904-645-7275		Phone 715-287-3335	
Email: patricia@linninc.com				Fax 715-287-4464	
Project John & Mary Smith Project Reference: 1284.1-1.100		Buyer Buyer: Joe Buyer Email: horizon@triwest.net			
Terms		Shipping Best Way		Special Instructions	
Order Qty	Make	Model	Finish	Cost	Ext Cost
1	Linn	5101 Personal Handset	Black	234.00	
Rowd _____ Universal learning remote					


Project Purchase Order Number Default

Choose one or all to display on the PO

Default ☒ PO Number
☐ User PO#
☐ Client Name

Enhancement – Product Library/Product Detail: Display Installed Price Option

You can now choose to display the Total Installed Price of a Product, including Product labor, Parts and Wires and their labor, by checking this box. An indicator “i” will be displayed next to the product price to show that the price is the total installed price. Keep in mind that this “Installed” price is for Product Library List display purposes only and products picked into Proposals function as they normally do. You can still click on the Price and get the full detail as well.

Find Products Replace Data		Product Library - Product Detail		2 of 4746 ? Home	
Product		Specs		Price	
Make: Linn Model: 5125 QB Item: Finish: Silver Description: Five channel power amplifier (Black)		Sell Price: \$2,750.00 ea 		Group: Audio : Amplifier : Multi-channel Class: Product Phase: 3 Final Status: Tax A: T Tax B: T Proposal Sort Order: m Favorite: A Fee SKU: <input type="checkbox"/> Phantom Product: <input type="checkbox"/> ?	
Features: The Linn AV 5125 5-channel Class V modular power amplifier features the latest Linn switch mode power supply and amplification technology.		Options:		Do not Hide: <input type="checkbox"/> ? Do not Delete: <input type="checkbox"/> Do not Discount: <input type="checkbox"/> Display Installed Price: <input checked="" type="checkbox"/> i Issue Staple Up Card: <input type="checkbox"/> ?	
		Inventory: \$3,310.00		Qty Cost Value	

Product Library - Line List

AlphaFind: Make [X] [?] [Home]

4,746 Items
4,750 Total

Phan Part New Product
Lab Wire Product Utilities Inventory Control Leave Product Sets Print Menu

Show Products Show All Detail List
Part Phantom Hidden Show Recent Products
Bulk PreCut Discontinued

Displin	Cat	Type	Class View	Make	Model : SKU	Description	Finish	Sell Price (Installed)	Cue	Auto Tag
Audio	Multi	Keypad		Linn	5101 Personal Handset	Universal learning	Black	390.00 ea		
Audio	Ampli	Multi-channel		Linn	5125	Five channel power	Silver	3,310.00 ea		
Audio	Sourc	Phono		Linn	Akito	Pick up tonearm	Black	255.00 ea		
Audio	Sourc	CD Player		Linn						
Audio	Ampli	Surround Receive		Linn						
Audio	Speak	Center Channel		Linn						
Audio	Speak	Floor		Linn						
Audio	Ampli	Preamplifier		Linn						
Audio	Ampli	Stereo		Linn						
Audio	Speak	Powered		Linn						
Video	Displ	Rear Projection		Sony						
Video	Sourc	DVD Player		Sony						
Video	Sourc	VCR		Sony						
Audio	Misc	Final Part		Linn						
Audio	Speak	On-Wall		Linn						

Installed Price (please expand window to show prices)

Linn
5125
Five channel power amplifier (Black) Silver

Product: \$2,750.00 ea - GP: 40%
Parts: \$.00
Wire: \$480.00
Labor: \$80.00
=====

Total Installed Price: \$3,310.00 ea

Date Modified: 7/29/2012

OK

Enhancement – Product Library/Utility/Grooming: Issue Staple Up Cards

This Utility will check or uncheck all of the Products in your Product Library for Issuing Staple Up Cards from the Shop Print Menu in your Proposals/Projects.

Check or Uncheck "Issue Staple Up Card" Flag

This Utility will Check or UnCheck the "Issue Staple Up Card" flag on All of the Products in your Product Library.

Issue Staple Up Cards

Message

Check to Issue Staple Up Cards, or Uncheck to Not Issue Cards on All Products in the Product Library

UnCheck Check Cancel

Enhancement – Master Prefs/Users/Access Rights: Labor Rates & Labor Times

User Access rights can now be set to prevent users from changing the Override Labor Time on Products in the Product Library and the Labor Rates and Labor Time on Products in Proposals. Pure Labor Supplement Times in Proposals can still be modified by Users regardless of the Access Rights settings.

Please note: After upgrading, the Labor Time and Labor Rights flags will automatically be checked for all Users. You may want to go into your Master Prefs/Users/Access Rights screen and uncheck the rights boxes for users who do not have rights to change the labor time.

Product Labor Rates & Time

☒ Proposal & Product Library - Product Override Labor Time
Note: Users always have rights to add/change Pure Labor Supplements in Proposals & CO's

☒ Proposal - Pricing Screen - Labor Rates

☒ Product Library - Labor Sub Groups

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

Mr. & Mrs. Lee Christenson
North American Fly LTD
Home Entertainment System
1289.1-1.100 Done

Pricing **Labor Rates** **Commissions**
Tax Summary **Product Tax** **Sees Tax**

Proposal - Pricing Show List Price & Discount ☒ yes ☐ no
Show Sales Tax ☒ yes ☐ no

	Subtotals	Sell	GP%	Cost	Profit	Discount	Total Labor Time
Equipment		\$4,579.99	35.2%	\$2,968.00	\$1,611.99		23:50:00
Installation		\$4,800.00	17.5%	\$3,992.00	\$897.92		
					\$872.00		
					\$1,197.98		
					\$183.72		
					\$4,763.61		

Message
Your Access Rights do not allow you to enter this screen
OK

Proposal - Labor Supplements Phantom Supplement = ☐ Print ? Home

Mr. & Mrs. Christenson
North American Fly LTD
Home Entertainment System
1289.1-1.100 Done

Areas **Text** **Products**
Labor **Parts** **Wire** **Tasks**

Labor Supplements Labor Total: 26:15:00 \$2,155.00

Zone - Area	Qty	Make : Model	View	Install	Tax	Hourly Rate	Total Time with DOD (h:m:s)	Ext Sell
Breakfast Room	2	Linn : 5101 Personal Handset	Installation	1,2	T T	\$60.00	1:30:00	\$90.00
Breakfast Room	2	Linn : 5101 Personal Handset	Programming	3	T T	\$80.00	2:00:00	\$160.00
Breakfast Room	2	Linn : 5101 Personal Handset	Training	2	T T	\$100.00	14:00:00	\$1,400.00
Breakfast Room	2	Linn : 5101 Per					2:00:00	\$100.00
Breakfast Room	2	Linn : 5101 Per					6:15:00	\$375.00
Breakfast Room	2	Linn : 5101 Per					0:30:00	\$30.00

Message
You do not have Access Rights to change Labor Time on Products.
OK

Proposal - Product Detail 1 of 1 ? Home

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

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

Prev Next

Product Specs Pix - PDFs Labor Parts Wire Tasks **Breakfast Room**

Qty 2
Make Linn
Model 5101 Personal Handset
SKU
Finish Black
Description Universal learning remote
Features Programmable, high-power, long hand held or table top operation

Message
You do not have Access Rights to change Labor Time on Products.
OK

Group Video : Multi-room : Keypad
Audio
Product
2 Trim
+ Tax B T
Product Sort m
Discontinued
Staple Card X

Product Library - Product Detail 1 of 4746 ? Home

Duplicate Product Delete Product

Product Created: 1/8/2002
Sell Updated: 7/11/2012
Cost Updated: 6/2/2011
Product is in a Proposal/Project

Linn
5125
Five channel power amplifier (Black)
Audio : Amplifier : Multi-channel

New Product Done Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

Make Linn
Model 5125
SKU
Finish Silver
Description Five channel power amplifier (B
Features The Linn AV 5125 5-channel Cl
the latest Linn switch mode pow

Message
You do not have Access Rights to change Labor Time on Products.
OK

Multi-channel
Phase 3 Final
Alt Groups
+ Tax B T
Phantom Product ?
Do not Hide ?
Do not Delete

Product Library - Group Labor Supplements 2 of 131 ? Home

Linn
Adikt
Moving-magnet cartridge
Audio : Source : Phono

Done Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

Group Assigned Labor
Audio : Source : Phono
Classification: Product
Primary Install Phase: 3 Final

Do not use Group Labor

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	2:00:00
3 - Training	\$100.00	0:00:00	0:00:00	2:00:00

Engage Manual Labor Override

Apply DOD 2 Avg 10%
Apply DOD 3 Avg 50%

Message
You do not have Access Rights to change Labor Time on Products.
OK

Total
00 = 4:00:00 hrs:min:sec
00 = \$320.00 Amount

Enhancement – POS/PO Ship To Label Manual Entry Override

The Ship to Label can now be changed from the normal default address (Company Ship To Location) to a manually entered name and address, by clicking on the Edit button.

Print Setup Delete PO Duplicate PO POS - Purchase Order

Print Store Copy Preview

OPEN PO #7182 4 of 58

Ship To: Shop Warehouse: Edit

John
Tri-Ed Mississauga Location
3688 Nashua Dr., Unit A-F
Mississauga, ON L4V 1M5

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

9/21/2005

Buyer Tina McKnight Need By 9/29/2005 Reference Pryde Ship VIA FOB Terms Receive All

Pick	Qty	unit	Product Description	Unit Cost	Ext Cost	Qty Rcvd	Qty Open
1	ea		GVI : MARV3022 : Desc. 2.9 wide angle lens for SAOGVHIDCH Dome Camera	34.33	34.33		1

Ship To Label: Client Address: Label Override ☒

Salutation First Last

Mr. John Smith

COMPANY

ADDRESS 4873 West Elm Street

CITY Westchester

ST, ZIP, COUNTRY NY 47432

Copy 1>2

Mr. Smith
4873 West Elm Street
Westchester, NY 47432

EME Audio & Video Systems 2950 Mall Drive Eau Claire, WI 54701 715-287-3335	EME audio & video	Purchase Order PO #7178 9/22/2005 Ship To: Client Address:			
ADI 1 City View Drive Etobicoke, ON M9W 5A5	Mr. Smith 4873 West Elm Street Westchester, NY 47432				
Need By	Reference	Ship VIA	FOB	Terms	Buyer
9/26/2005	Palter/Lipson				Chad Trude
Qty	Description	Price	Total		
2	ea Channel vision : DP-RBOX-II : Flush mount box for DP series Doorphone	13.63	27.26		
1	ea Channel vision : DP-900x : Surface mount box for DP series	13.63	13.63		

Enhancement – Product Library/Delete Duplicated Product

If you duplicate a Product in the Product Library, you can now Delete it as long as it is not part of a Proposal or Project. In the past these Duplicated products could only be Hidden regardless if they had been added to a Proposal or Project

Product Library - Product Detail

Product Created: 7/10/2012
 Sell Price: \$645.00 ea
 Cost Updated: 6/2/2011

Linn
Cirkus Kit Copy
 Main bearing upgrade for Sondek LP12
 Audio : Source : Phono

Product Specs Pix PDF Labor Parts Wire Tasks

Make: Linn
 Model: Cirkus Kit Copy
 QB Item:
 Finish:

Description: Main bearing upgrade for Sondek LP12

Features: The Cirkus upgrade for the LP12 focuses on bearing performance and the connection of the bearing housing to the sub-chassis. The improved bearing and stronger sub-chassis arrangement provides the turntable with greater stability and ensures the bearing sits perfectly true to the chassis of the turntable.

Sell Price: \$645.00 ea

Group: Audio : Source : Phono
 Class: Part Phase: 3 Final
 Status: Tax A: T Tax B: T
 Favorite: Fee SKU: Phantom Product: ?
 Options: New Item: Do not Hide: ?
 Hide this Item: Do not Delete: ?
 Discontinued Item: Do not Discount: ?
 Proposal Sort Order: m Issue Staple Up Card: ?
 Inventory: Qty Cost Value

```

zzzf.validProduct.c Copy =
Case(
  IsValid(mLine~zk.prod::zk.prod.f) or
  IsValid(part~prod::zk.prod.f) or
  IsValid(part~prod~partProd::zk.prod.f) or
  IsValid(wire~prod::zk.prod.f) or
  IsValid(wire~prod~wireProd::zk.prod.f),
  1)
  
```

remove

Enhancement – Product Library/All Line List Screens: Show Group button with Options

This new View button will Show all of the Products in the Group you pick. You also have the option to show only Products with the Make of the Group you pick. Check this option if you wish, before you click the View button.

Product Library - Line List

AlphaFind: Make

13 Items
4,751 Total

Phan Part
Lab Wire

Product Utilities
Inventory Control

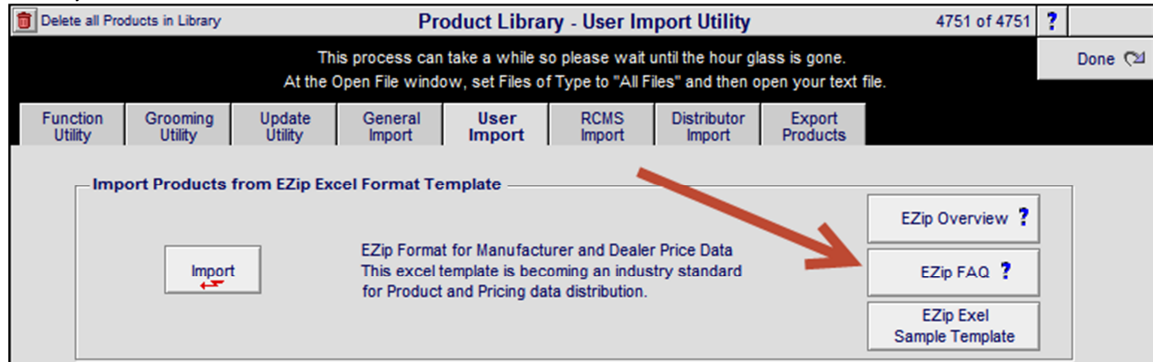
Leave
Product Sets
Print Menu

Show All Groups

Displn	Cat	Type	Class View	Make	Model : SKU	Description	Finish	Sell Price	Cue	Auto Tag
Audio	Ampli	Multi-channel	Q	Crestron	CNAMPX-12X60	12 Channel Multi-Room	Black	2,800.00 ea		
Audio	Ampli	Multi-channel	Q	Crestron	CNAMPX-16X60	16 Channel Multi-Room	Black	3,900.00 ea		
Audio	Ampli	Multi-channel	Q	Crestron	CNAMPX-2X60	2 Channel Amplifier	Black	1,000.00 ea		
Audio	Ampli	Multi-channel	Q	Crestron	CNAMPX-7X200	7 Channel Surround	Black	4,800.00 ea		
Audio	Ampli	Multi-channel	Q	Crestron	QM-AMP3X80MM	3 Channel Multimedia	Black	750.00 ea		
Audio	Ampli	Multi-channel	Q	Linn	5125	Five channel power	Silver	2,750.00 ea		
Audio	Ampli	Multi-channel	Q	Linn	Knekt Roomamp	Room amplifier	Black	1,033.33 ea		
Audio	Ampli	Multi-channel	Q	Linn	Roomamp 2i	Simple Room amp	Black	1,590.00 ea		
Audio	Ampli	Multi-channel	Q	Sonance	Sonamp 1230 : 91779	12 Channel Sonamp		1,240.00 ea		
Audio	Ampli	Multi-channel	Q	Sonance	Sonamp 1250MKII : 91784	12 Channel Sonamp		2,075.00 ea		
Audio	Ampli	Multi-channel	Q	Sonance	Sonamp 2120T : 91122	2 Channel Sonamp		690.00 ea		

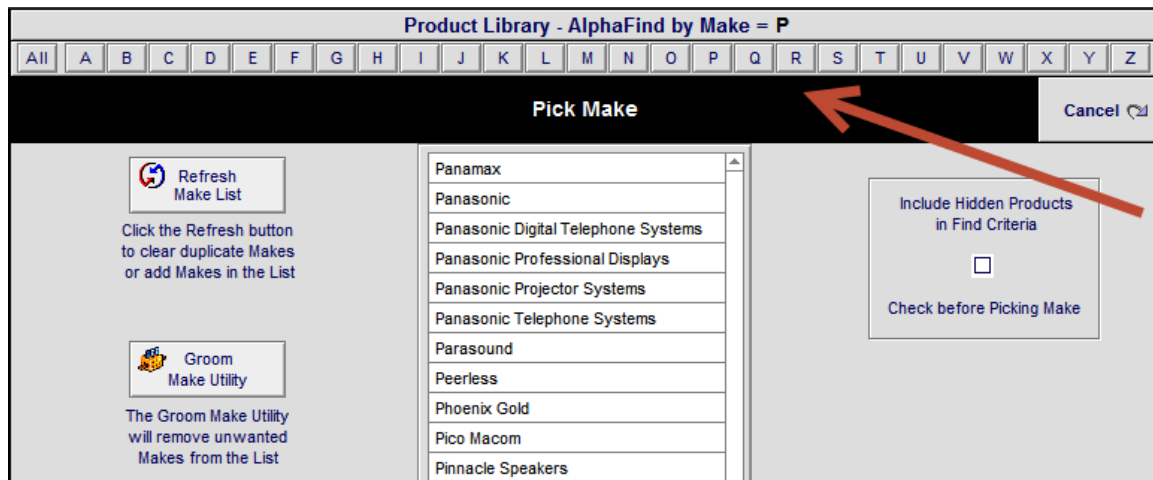
Enhancement – Product Library/Utility/User Import: Ezip Overview and FAQ

The EZip Excel file format is an industry standard template that you can request your vendors to supply their price sheets to you in. The Import button will merge the product prices with your SCPS product library and update the prices and add new products if they don't exist in your library.



Enhancement – Product Library: Alpha Finder in the Alpha Finder

You can now switch the Alpha Finder Make selection from within the Alpha Finder.



Fix – Project/PO/WO/SI: Sum Qty. Order Qty not accurate in duplicated Projects/Proposals.

Because duplicating Proposals/Projects was not stamping the correct megaProp key on the duplicated entity, the Sum Qty calc was including products from those entities. This has been corrected and the legacy data has been corrected with an upgrade routine.

Purchase Orders - All - 24 Products										PO	WO	SI			?		Home																		
Dr. & Mrs. Saul Modlin										To Order		Back Order		Create PO		Leave																			
2811.2-1.2										Products 4				Auto Set PO Qty		View P.O.'s																			
Global Buy Pkg Off																																			
PO Products PO Parts PO Wire Sum Proj Orphan																																			
Phase																																			
Zone - Area										CO#		Qty Sold		Make : Model		Updated — Master Cost		Finish Project Cost		Vendor ? Avg PO Cost		Qty Staged On Hand		To Order Qty		Enter PO Qty		Sum Mode - PO Status		Qty Ordered		Recvd to date		Back Order	
3										1 ea		Audio Quest : AQ Forest 2m		7/21/2011		\$18.00		\$18.00		Audio Quest		2		-1											
3										2 ea		Audio Quest : AQ Forest 8m		7/21/2011		\$55.80		\$55.80		Audio Quest		4		-2											
1										1 pr		IDS : Camera Prewire		5/31/2012		\$25.00		\$25.00		IDS Audio		2		-1											

Duplicating a Proposal/Project now properly stamps the megaprop key in Main and Mainline.

FileMaker Pro - [Main.fp5]

File Edit View Insert Format Records Scripts Window Help

Script Definition for "rec.dup.Prop [part2, xsubs multi]"

View all by category "rec.dup.Prop [part2, xsubs multi]"

Control

- Perform Script
- Pause/Resume Script
- Exit Script
- Halt Script
- If
- Else
- End If
- Loop
- Exit Loop If
- End Loop
- Allow User Abort
- Set Error Capture

Navigation

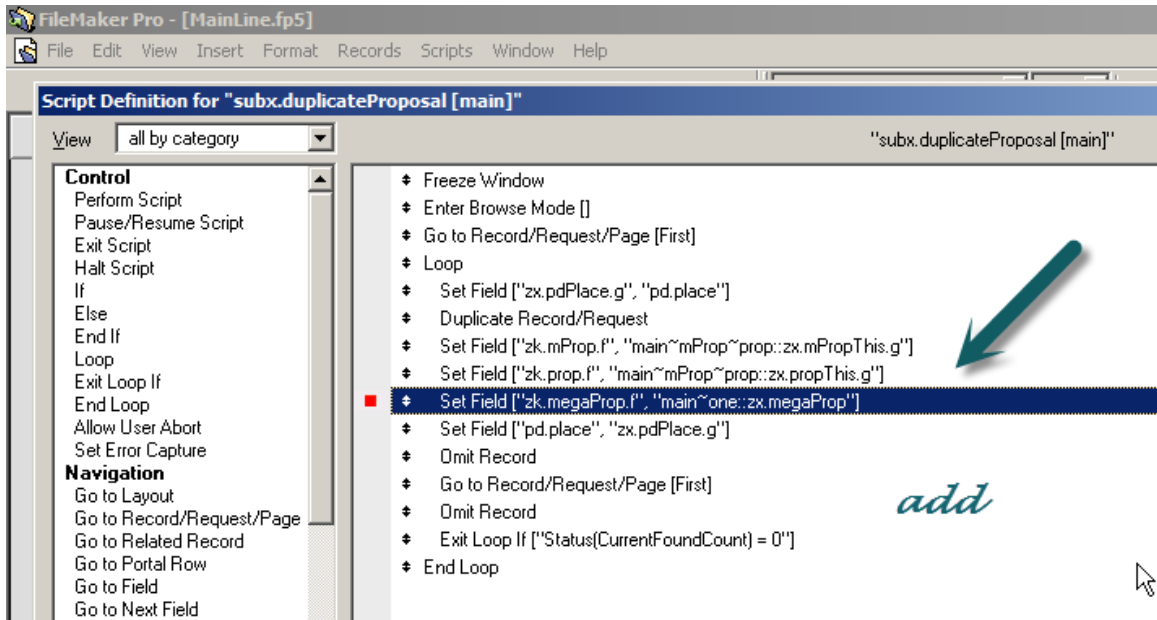
- Go to Layout
- Go to Record/Request/Page
- Go to Related Record
- Go to Portal Row
- Go to Field
- Go to Next Field
- Go to Previous Field
- Enter Browse Mode
- Enter Find Mode

```

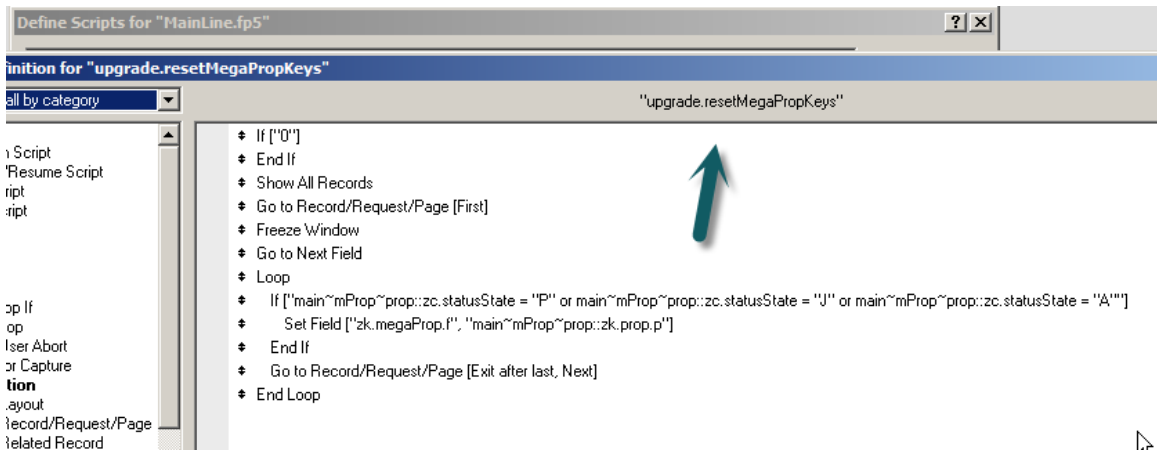
* Freeze Window
* Perform Script [Sub-scripts, "ops.freezeSelfAndChildren [xs..."]
* Enter Browse Mode []
* Set Field ["~mProp~prop::zf.coAdded.b", ""]
* Set Field ["zxl.recCount.n", "Sum(mLine~mProp::zk.one.c)"]
* Go to Related Record [Show, "~prop~mProp"]
* Go to Record/Request/Page [First]
* Set Field ["zxp.wiFtPropSq.n", "mPref~mProp::zp.wireFtPropSq.lo"]
* Loop
*   Set Field ["zx.prop.g", "zk.prop.p"]
*   If ["zk.mProp.p = zk.prop.p"]
*     #is system record
*     Set Field ["zx.mProp.g", "zk.mProp.p"]
*     Set Field ["zx.mProp$1.g", "zk.mProp.p & "1"]
*     Duplicate Record/Request
*     Set Field ["zx.mPropThis.g", "zk.prop.p"]
*     Set Field ["zx.megaProp", "zk.prop.p"]
*     Set Field ["zk.mProp.p", "zk.prop.p"]
*     Set Field ["zk.megaProp", "zk.prop.p"]

```

add



Legacy data, mainline megaProp key correction built into the upgrade routine.

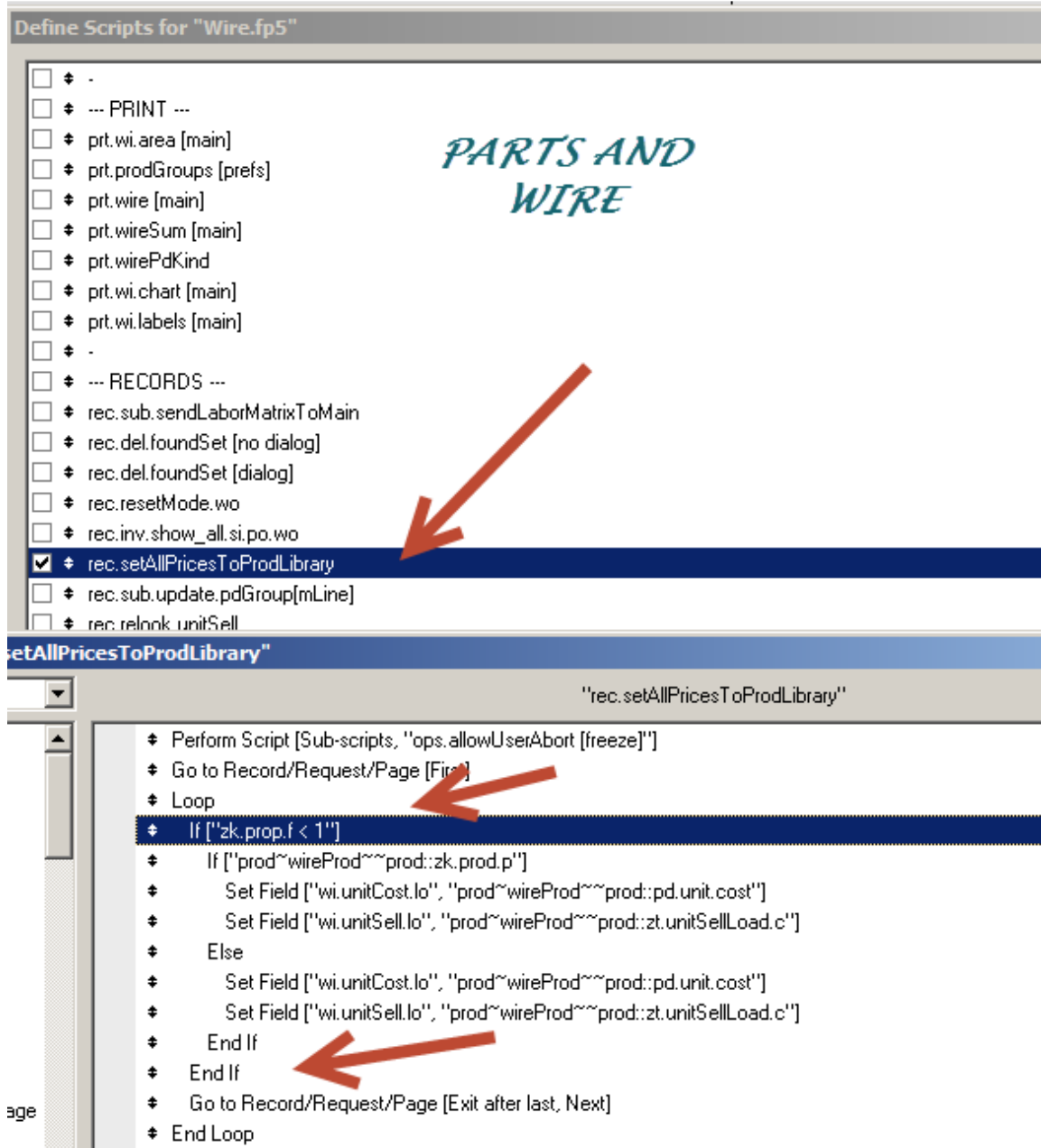


Fix – Product Library/Utility/(Auto Upgrade)/Update Parts & Wire Supplement Keys

PO Summing was picking up other project quantities. This automatic Upgrade utility reset the Product/Supplement keys to keep all products separate.

Fix – Product Library/Update Utility: Update Parts & Wire Supplement Prices

This Utility now correctly updates the prices shown on Parts and Wire Supplements attached to Products in the Product Library. It no longer changes the price on products in Proposals and Projects.



Fix – Product Library: Inventory Control/Totals

The Grand Totals utility now shows all Grand Totals including the Optimize levels for whatever products are shown on this screen.

Product Library - Inventory Grand Totals

Inventory Grand Totals

Done

Optimum Level	Service	Display	New	Inventory on Hand
\$1,721,640.60			-\$1,814.40	\$1,433,032.90

Product Library - Inventory Count AlphaFind: Make ☒ Hidden ☐

Find Products Fav A B C

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

Show Products 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 Qty Received + Invoice Sold Qty
2. Take Physical Inventory by entering Adjust Qty and click Post All button

Print Menu Done

Post All Qty On Hand Purchasing List

Items: 4,753 Total: 4,753 Unit Cost Hidden < Phantom >

Make Model

5101 Personal Handset 234.00

5103 System Controller 3,300.00

5110-W 195.00

1,650.00

Manual Inventory Show Only Items with Logs

Projects Change Orders POS Invoices Post

Automatic Inventory Show Items on Specific Invoices

Service Qty Display Qty New Qty Edit

Qty On Hand Adjust Qty Inventory Totals

Message

Calculating Inventory Totals takes a few moments and sum only those products showing on this screen. More Totals configurations can be printed or previewed from the Print Menu.

Click OK to continue or Cancel.

OK Cancel

Product Library - Inventory Grand Totals

Inventory Grand Totals

Done

Optimum Level Service Display New Inventory on Hand

zt_maxValueSum InServiceAmt OnLoanAmt NewInBoxAmt zt_QOHValueSum

Header

Body

Specify Button

In Browse or Find mode, clicking on the selected set of objects will:

Do Nothing

Control

Perform Script

Resume Script

Exit Script

Halt Script

If

Else

End If

Loop

Exit Loop If

End Loop

Allow User Abort

Set Error Capture

Navigation

Go to Layout

Go to Record/Request/Page

Go to Related Record

Options

Specify: prod 4 utility

Button Style

☒ Rectangular button

☐ Rounded button

☒ Change to hand cursor over button

OK Cancel

Fix – Product Sets/Set Detail: Subset Sell Price

The Subset Sell Price now comes from the Adjusted Sell Price of the Product in the Product Library, so the amount displays properly.

[illegible]

Fix – POS/Invoices: Post User Name in Salesman's field

When creating a POS Invoice from the Contact Detail the User Name is now entered into the POS Sales Specialist field.

Find Contacts		Replace Data		Contacts - Contact Detail			Print Contact		Print Menu		Home		
Duplicate Contact		Delete Contact		Talli Berger			New Proposal		New POS		Done		
							New Contact				Prev Next		
Details		Info		Com Log		Entities		Files & Pix		Transactions		New Task	
												5 of 134	

Labels

Category	Client	Class		Key		ID		Fav	<input type="checkbox"/>
	Create Vendor and Assign Product Makes	Group		Status		Staff		Tag	<input type="checkbox"/>

<div> <div>Print Setup</div> <div>Delete Invoice</div> </div>		<h2>POS - Sales Invoice</h2>		<div> <div>Pick Price Cue</div> <div>▼ ▲ ▴ ▾</div> <div>?</div> <div>Home</div> </div>	
<div> <div>Print</div> <div>No Labor Detail</div> </div>		<h3>Invoice</h3>		<div> <div>Costing</div> <div>Done</div> </div>	
<div> <div>Preview</div> <div>Packing:</div> </div>		<div>SI #7199</div>		<div> <div>1 of 1</div> <div>Set Up</div> <div>Prev</div> <div>Next</div> </div>	

<div> <div>Talli Berger</div> <div>567 58TH Street</div> <div>Oakland, CA 94607</div> </div>		<div>Home 715-695-3613</div>	
<div>Jess Shipman Son</div>		<div> <div>Label Address 2:</div> <div>Show Hide</div> </div>	
<div> <div>Talli Berger</div> <div>7/25/2012</div> </div>		<div> <div>7/25/2012</div> </div>	

<div> <div>Sales Rep</div> <div>Terms</div> </div>		<div> <div>Ship VIA</div> <div>Date</div> </div>		<div> <div>Payment</div> <div>Check Number</div> </div>		<div> <div>Reference #</div> </div>	
<div>Jim Engandela</div>		<div>Standard Payment Terms</div>		<div></div>		<div></div>	

Pick	Qty unit	Product Description	Install (h:m:s)	Unit Price	Ext Price	Tax A
------	----------	---------------------	-----------------	------------	-----------	-------

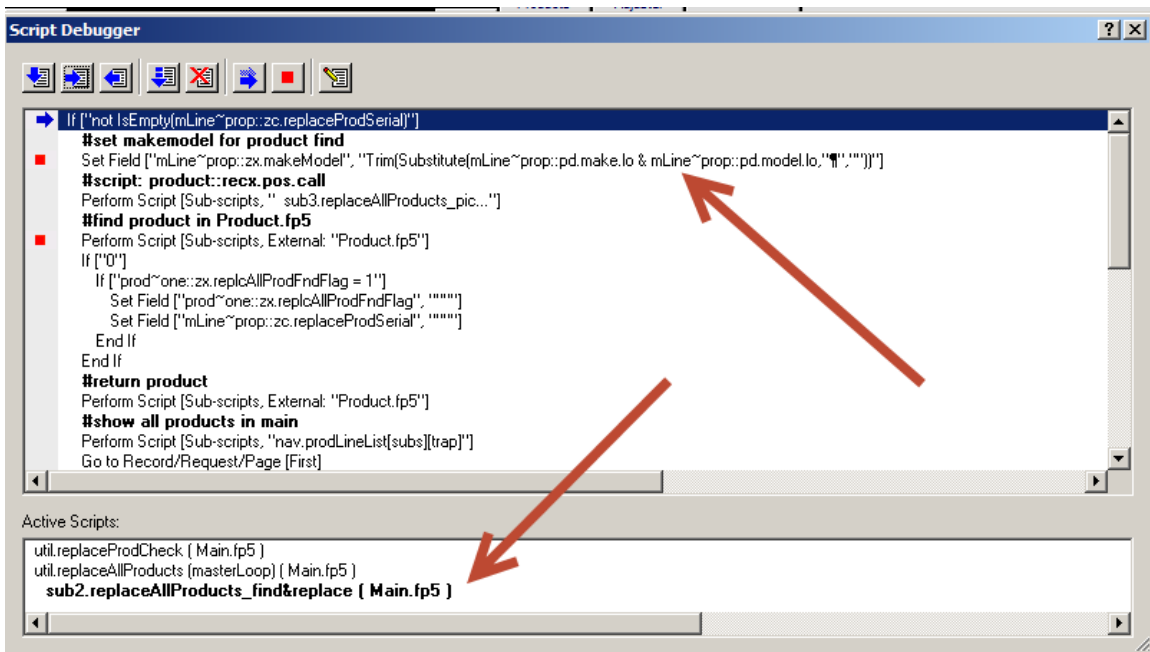
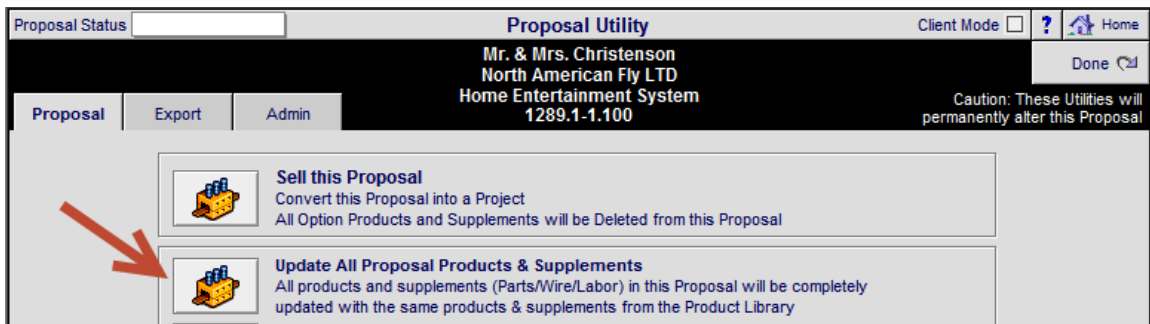
SCPS Version 9.4v3

Released: 6/22/2012

Fix – Proposal/Product List: Update All Products Utility

If you have cartridge returns or spaces in your Make or Model in your Product library numbers (on the Products being updated) this routine will fail. This has been corrected.

```
trim(substitute(mLine~prop::pd.make.lo & mLine~prop::pd.model.lo,"¶",""))
```



SCPS Version 9.4v2

Released: 6/20/2012

Fix – Proposal/Product Detail/Adding Parts and Wire 9.4v1 correction. This is a critical fix.

Fixing the adding of Pure Parts and Wire Supplements affected the adding of regular Parts and Wire Supplements to a Product in a Proposal. This has been corrected.

```
.portalRowPart"  
"6 recx.add.portalRowPart"  
  
✦ #change je  
✦ If ["Status( CurrentLayoutName) = "ProdDetailPartSup"]  
✦   Set Field ["zx.cat4PartLab.n", "1"]  
✦   Set Field ["zx.megaProp", "~mProp~~prop::zk.prop.p"]  
✦ End If  
✦ If ["0"]  
✦   Show Custom Dialog ["Main 6", ""]  
✦ End If  
✦   Show Message ["Your access rights do not allow you to do this."]   
✦ End If  
✦ If ["Status( CurrentLayoutName) = "ProdDetailPartSup"]  
✦   Perform Script [Sub-scripts, "fnd.megaProp"]  
✦ End If  
  
Options
```

```
"7 recx.add.portalRowWire"  
  
✦ If ["Status( CurrentLayoutName) = "ProdDetailWireSup"]  
✦   Set Field ["zx.megaProp", "~mProp~~prop::zk.prop.p"]  
✦ End If  
✦ Set Field ["pref~one::zxl.currAction.g", ""addSuppWire"]  
✦ If ["0"]  
✦   Show Custom Dialog ["Main 7", ""]  
✦   Perform Script [Sub-scripts, "recx.postAll.AreaThis"]  
✦   Perform Script [Sub-scripts, "9 sub.createRemainingSuppDisc..."]  
✦ End If  
✦ If ["Status( CurrentLayoutName) = "ProdDetailWire"]  
✦   Show Message ["Your access rights do not allow you to do this."]   
✦ End If  
✦ If ["Status( CurrentLayoutName) = "ProdDetailWireSup"]  
✦   Perform Script [Sub-scripts, "fnd.megaProp"]  
✦ End If  
  
Options
```

Fix – Proposal/Project: Update Master Tracker Tasks

After changing the Proposal Due Date, the Update button now changes all of the Master Tracker Task dates for this Proposal.

Proposal - Project

Client: LeRoy Asher
Project: Home Entertainment System
1291.1-1.100

Info | Contacts | Com Log

Proposal-Project Title: Home Entertainment System

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

Hourly Labor Rates:

Rate Structures	Labor Categories	Sell
1 Basic Rate	Installation	60.00
2 Inner City Rate	Programming	80.00

Proposal Due Date: 1/1/2013

Install Phase Dates

Fix – Project/Work Order/Invoices: Appointments

The Work Order Appointment feature now works properly and creates an appointment in the Master Tracker and posts the appointment date/time on the printed Work Order.

Work Order Detail

WO Number: 2007 - 1286.1-1.100
WO Date: 9/13/2006

Master Tracker Appointment
WO Total Time: 52:05
Additional Time:
WO Time To: 52:05
Requested Installation:
Add Appt | Edit Appt
Appointment: 6/28/2012 1:00 PM

WO Notes: Gary Hagen
Whole House Music System
1286.1-1.100

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 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		
3								Universal learning remote						

Work Order Date: 9/13/2006
Page: 1

**EME Audio & Video Systems
Work Order**

Work Order Number: 2007 - 1286.1-1.100

Address 1:
Gary Hagen
567 58TH Street
Oakland, CA 94607

Address 2:
Gary Hagen

Contact Numbers
(H) 715-695-2991

Client Signature

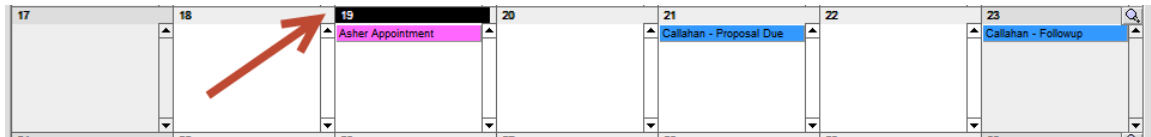
WO Installer: Jim Engandela
Project Manager: Jon Oster

Sales Specialist: Jim Engandela
Project Engineer: Jon Oster

Installation
Appointment: 6/28/2012 1:00 PM
Date Installed:
Credit Release:
Projected Install Time: 5:05:00
WO Installation Time:
Installer Name:
Actual Install Time:
Installer Name:
Actual Install Time:
Installer Name:
Actual Install Time:

Fix – Master Tracker/Calendar: Fix black highlight graphic

The black graphic element that indicates today's day now extends across the entire day block.



Enhancement – Master Tracker: Deleting all records add one record automatically

If you delete all of the Master Tracker records either using the delete feature on the Utility screen or the Delete Checkboxes, SCPS will automatically add one blank record so that relationships to the Task file are maintained.

The screenshot shows the Master Tracker application interface. A red arrow points to the 'Total Pymts' field, which now displays '0:00'. The interface includes a top navigation bar with 'Find Items', 'Show All', and 'Master Tracker'. The main area displays a list of items with columns for 'Due Date', 'Tracker Item', 'Proposal Project', and 'Item Owner'. The 'Total Pymts' field is highlighted in red.

SCPS Version 9.4v1

Released: 6/18/2012

Enhancement – SCPS Subscription Notice: Additional Email Notification CC

Horizon highly recommends that SCPS Administrators add a Renewal Notification Email CC on the Horizon screen. This email address will send an Email message, that the current User has been notified to renew the subscription. This will help ensure that the Subscription Renewal Notice is acted upon. The “10 days remaining” has also been removed from the notice.

Subscription Renewal

Subscription 89 Days Left

Email Horizon for a New Code

Copy Current Code
Current Code 73466851095

Enter your New Code & click Activate.

Activate

Renewal Notification Email CC
horizonse@triwest.net

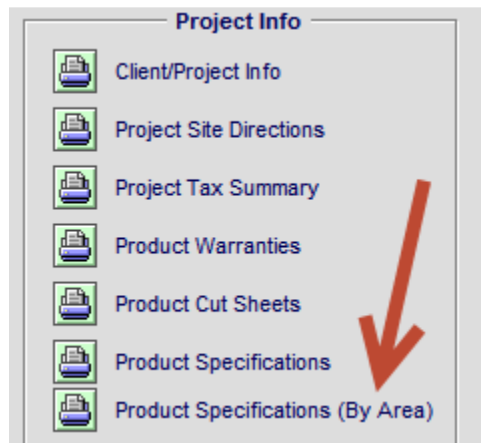
Enhancement – Proposal/Products: Redesign Product List screen

The Do not Discount and Exclude \$ checkboxes are now on each product and color coded. If you click on these labels a help message will pop up explaining their usage. The Switch Product and Option check boxes have been moved for better clarity.

Super View		Area Sum		Prod Sum		Proposal - Products										Client Mode <input type="checkbox"/>											
Areas		Text		Products		= Orphan		LeRoy Asher										Phantom =		Update All Products		Auto Price Adjuster		Done			
Labor		Parts		Wire		Tasks		Show All		Home Entertainment System 1292.1-1.100										Install Location Notes		Switch Many Products		Delete All Options		Product Total \$390.00	
No Disc't		View		Zone - Area		Make		All 1 Products										Product Labor		Unit List		Adjusted Sell		Extended Sell			
Exclude \$		Switch		Discipline		Category		Model										Parts Labor		Unit Cost		Unit Sell		Ext Installed			
		Product		Phase		Type		Description										Wire Labor		Updated Sell		GP%		Ext Discount			
				1 ea		Atrium		5101 Personal Handset										982.50				390.00		390.00			
				Audio		Multi-room		Universal learning remote :										1,085.00		234.00		390.00		1,372.50			
				2 1292.1		Keypad		Black										1,966.50		6/2/2011		40.0%					

Enhancement – Proposal/Print Menu/Shop: Product Specification Report by Zone-Area

This report shows all of the Proposal Product Specifications sorted by Zone-Area. This report can be presented to Clients.



6/14/2012

EME Audio & Video Systems
Product Specifications by Area


Page 1

Dana Berkow
Home Entertainment System
1268.1-1.100

All specifications are subject to error or change and dimensions should be physically verified.


1 - Home Theater

Linn - 5101 Personal Handset - Universal learning remote

A black, handheld universal learning remote control with numerous buttons.

Finish	Black		
Dimensions	H 5" x W 5" x D 5"		
Cut Out Size	H 6" x W 7" x D 7"		
Rack Spaces	1	Box Size	1
Mount Height			
Weight		Amp Draw	
AC Power			
DC Power			

Linn - 5125 - Five channel power amplifier (Black)

A black, rectangular five-channel power amplifier with a silver faceplate.

Finish	Silver		
Dimensions	W 381mm x H 75mm x D 354mm		
Cut Out Size			
Rack Spaces	1	Box Size	1
Mount Height			
Weight	5	Amp Draw	
AC Power			
DC Power			

Enhancement – Proposal/Project/Info: 2 Additional Employee Fields and Labels

Two additional, user definable, Specialist fields with labels and Email fields have been added to the Proposal/Project Info screens.

The screenshot shows the 'Proposal - Info' screen for 'LeRoy Asher'. The 'Specialist Info' section on the right contains the following fields:

- Sales Location: EME Audio & Video Systems, 2950 Mall Drive, Eau Claire, WI 54701
- Sales Specialist: Jim Engandela, Title: President, Email: Horizon@trivest.net
- Project Manager: Jon Oster, Email: Horizon2@trivest.net
- Project Engineer: Jim Engandela, Email: Horizon@trivest.net
- CAD Operator: Dave Dowling, Email: horizon4@trivest.net
- Misc2: (empty), Email: (empty)

Two red arrows point to the 'Misc2' and 'Email' fields, indicating the new user-definable fields.

Enhancement – Pure Labor, Pure Parts & Pure Wire Supplement – Discipline

The Discipline assigned to Pure Labor, Parts & Wire Supplements are now displayed on the right side of each Supplement. (Only Parts screen shown in pix)

The screenshot shows the 'Pure Parts' screen. The 'Disciplines in Breakfast Room' section lists:

- Audio: Supplemental : Items
- Automation: Supplemental : Items
- Equipment: Supplemental : Items

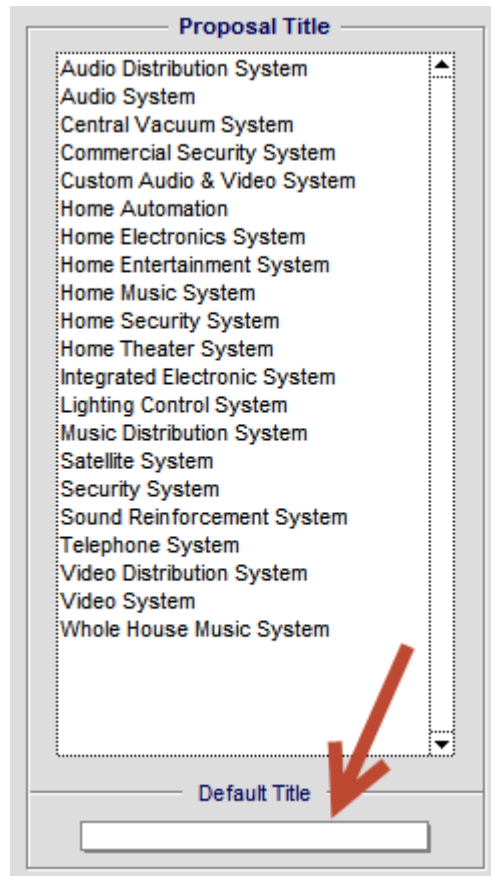
The 'Pure Supplement Parts in Breakfast Room : Automation Discipline' section shows a table with the following data:

Qty	Make	Model	Phase	Unit Labor	Unit Sell	Ext Sell	Discipline
1 pr	Linn	Corner Brakit			95.00	95.00	Automation
	Loudspeaker corner bracket: pair			3	0:15:00	Supplement	

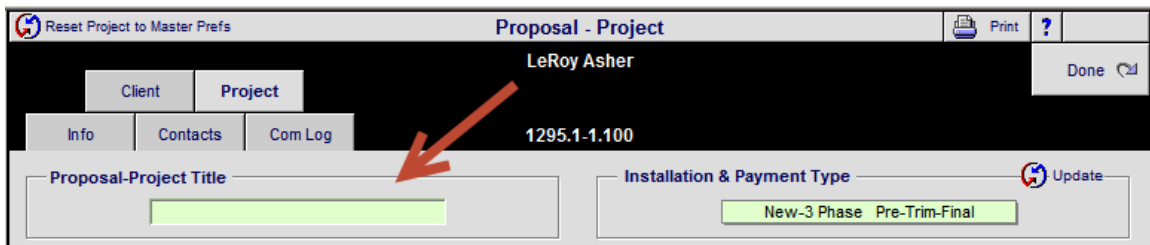
A red arrow points to the 'Discipline' column header, highlighting the new field.

Enhancement – Master Prefs/Lists/Proposal: Proposal Title: Blank Title Entry

The Master Preferences Default Proposal Title now has an “Other” command so that you can blank out the Default title. This enables new proposals to start with a blank Proposal Title.



A screenshot of a software window titled "Proposal Title". It features a list box containing 20 system types: Audio Distribution System, Audio System, Central Vacuum System, Commercial Security System, Custom Audio & Video System, Home Automation, Home Electronics System, Home Entertainment System, Home Music System, Home Security System, Home Theater System, Integrated Electronic System, Lighting Control System, Music Distribution System, Satellite System, Security System, Sound Reinforcement System, Telephone System, Video Distribution System, Video System, and Whole House Music System. Below the list box is a text field labeled "Default Title". A red arrow points from the list box to the "Default Title" field.



A screenshot of a software window titled "Proposal - Project". It contains several fields and buttons. At the top, there is a "Reset Project to Master Prefs" button. Below it, the "Client" field is set to "LeRoy Asher" and the "Project" field is set to "1295.1-1.100". There are buttons for "Info", "Contacts", "Com Log", "Print", and "?". A "Done" button with a checkmark icon is on the right. Below these, there is a "Proposal-Project Title" field with a green highlight and a red arrow pointing to it. To the right of this field is an "Installation & Payment Type" field with a green highlight and an "Update" button with a circular arrow icon. The "Installation & Payment Type" field contains the text "New-3 Phase Pre-Trim-Final".

Enhancement – Project/Utility/Admin: Adjust Product Cost in a Project

This screen enables you to change the Cost of Products, in this Project, for Job Costing Purposes. Only Users with Administration Access Rights can access this Utility.

Project Utility - Administration ? [Home](#)


Jim Engandela
Horizon Software
Home Entertainment System
1288.1-1.100

[Project](#) [Export](#) [Admin](#)

Change Project Number

This administration utility enables you to change the Project numbers on existing Project. Project numbers do not have to be unique to function properly, but keeping them unique is better from an organizational standpoint. This utility should be used with discretion.

Project Number	Project Version	Store Location	User Number
1288	1	1	100

 **Manually Change Product Costs (in this Project)**
This screen enables you to change the Cost of Products, in this Project, for Job Costing Purposes.

Project - Product Cost									
Jim Engandela Horizon Software Home Entertainment System 1288.1-1.100									
Orphan = ■ Product Total \$4,270.25 Phantom = ■									
Co Status	Zone - Area	Discipline	Phase	Exclude from Total	Make Category	Type	Model Description	Unit Cost	Adjusted Sell Unit Sell GP% Ext Installed
2 ea	Dining Room	Linn	Automation	<input type="checkbox"/>	Control	Keypad	Knekt RCU	450.00	712.50 1,425.00
			2 1288.1				Knekt room control unit : White		750.00 2,015.03
									36.8% -75.00
1 ea	Dining Room	Klipsch	Audio	<input type="checkbox"/>	Speaker	Bookshelf	RS-7	236.50	427.50 427.50
			3 1288.1				Reference Surround Matte Black		450.00 516.70
									44.7% -22.50

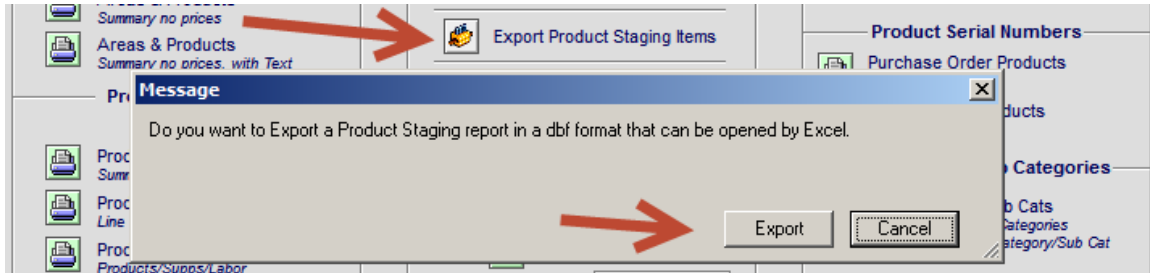
Enhancement – Project/Wire Manager: Zone/Area Default

The Wire Manager now default sorts by Zone/Area instead of Discipline. This Default can be changed in Master Preferences/Other/Project 2 screen. Minor button and label changes have been made for better clarity.

Source Product		Head End		Proposal - Wire Manager		Sorted by Zone/Area		Print Setup	
Install Notes		Head Ends		Mike & Jessica Potter		Discipline		Wire Chart	
		Select a Head End and assign it to a Product End		Security System 1282.1-1.100		Zone/Area		Wire Labels	
		Structured Wiring Panel				Discipline		AutoSet Wire ID's	
Discipline		Source Product		Wire Connected To		Product End or Head End		Wire ID	
Type		Product Install Notes		Wire Class Wire Make - Model		Add Head End notes in the Head End field		Product End Install Notes	
Audio		1 - Basement - Linn : Katan		Bulk Linn : K20 Cable		Product		1 - Basement - Linn : 5125	
Bookshelf				Room Run Loudspeaker cable		Head			
						Product			
						Head			
						Product			
						Head			
						Product			
						Head			
						Product			
						Head			

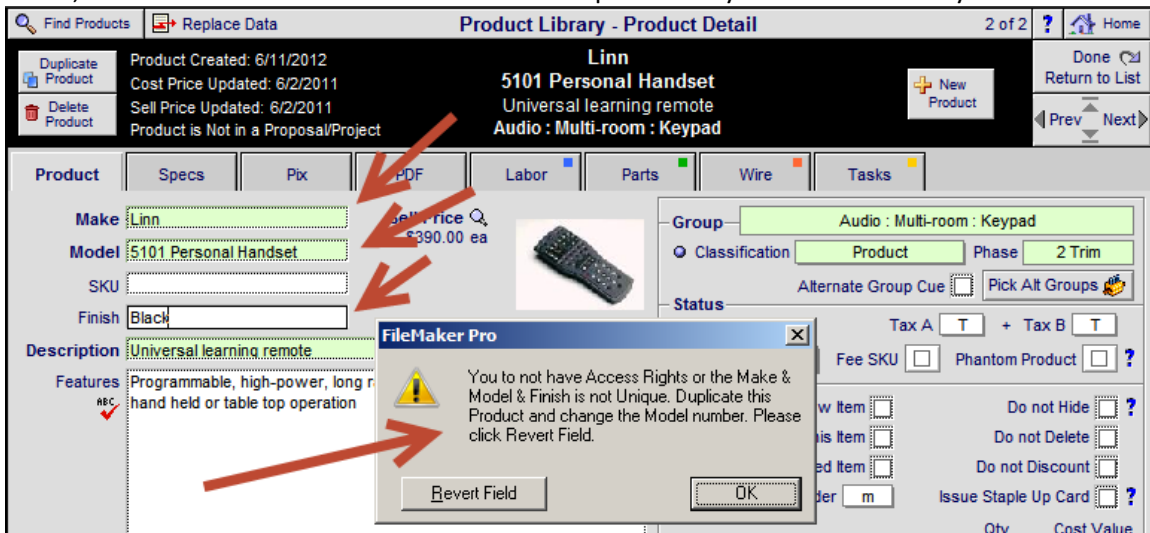
Enhancement – Project/Print Menu/Shop: Export Product Staging to Excel

This Utility enables you to Export the Products in the Project to a dbf formatted file which can be opened by Excel. You will be prompted to paste the Proposal number and Client Name into the File Name and select the Location to save the file.



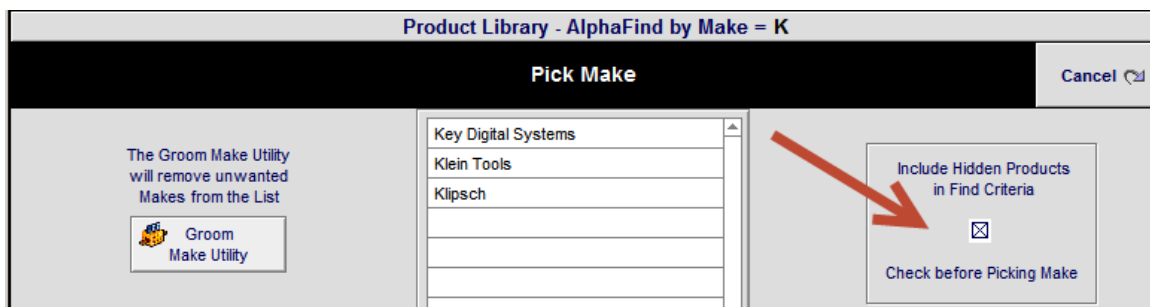
Enhancement – Product Library: Unique Product Make, Model, Finish Validation

All Products in the Product Library must have a Unique Make, Model and Finish. If you create a new product or duplicate an existing product you will now receive a warning message if the Make, Model and Finish are the same as another product in your Product Library.



Enhancement – Product Library/AlphaFinder Option to show Hidden Products in Find

You can now find all of the Products for a Make including all Hidden products for that Make, by clicking this checkbox and then clicking on the Make.



Enhancement – Product Library/Find Products: One field for finding by Make Model Descript

You can now enter the Make or Model or Description of a product in one field and then click the Done Find button and it will find all of the products that meet that criteria. Partial entries will find all products that meet that criteria as well.

The screenshot shows the 'Product Library - Find Products' window. At the top, there's a 'Supplier' field and an 'Install Phase' dropdown. Below these is a large text input field labeled 'Enter find criteria and click the Done/Find button'. To the right of this field are two buttons: 'Find with more Criteria' and 'Done Find'. Below the main input field, there are three sections: 'Pick Make' with buttons for 'Find Multiple Makes', 'Update Make List', and 'Make Pop Up List'; 'Fast Find' with input fields for 'Enter Make Model Description', 'Enter Model', 'Enter SKU', and a 'Pick Model' button; and 'Product Groups' with a table of Discipline, Category, and Type. The table lists Audio Amplifiers: Integrated Amplifier, Multi-channel, Preamplifier, and Single Channel.

Enhancement – Product Library/Utility/Grooming: Convert Descriptions to CAPS

Add the option to change all Product Descriptions to CAPITAL case.

The screenshot shows the 'Product Library - Grooming Utility' window. At the top, it says '4750 of 4750' and has a 'Done' button. Below the header is a row of tabs: Function Utility, Grooming Utility (selected), Update Utility, General Import, User Import, RCMS Import, Distributor Import, and Export Products. The main area is divided into three sections. The 'Groom Product Text Case' section has four options: 'Convert to Normal Case', 'Convert to CAPS' (highlighted with a red arrow), 'Convert to CAPS' (with a note 'Features will stay as entered'), and 'Convert Make to ALL CAPS'. The 'Assign Groups to Many Products' section has a description and an 'Assign Group to Many Products' button. The 'Delete Products without Model numbers' section has a description and a 'Delete' button.


Enhancement – Product Library/Utility/RCMS Import/Listen Up: Set Description to CAPS

The RCMS product import for Listen Up has been modified to convert all Product Descriptions to CAPS.

The screenshot shows the 'Listen Up Audio Video' window. It has an 'Import' button. To the right of the button is a list of instructions: '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, and not Descriptions.', 'Product Text will be groomed automatically. Descriptions set to CAPS', and 'Product Units will be changed from Each=ea, Foot=ft, Pair=pr.'. To the right of these instructions is a list of price codes: 'Price A iv107 = pd.unit.sell', 'Price B iv108 = pd.unit.list', 'Price D iv110 = pd.unit.sell.min', and 'Comm Cost iv024 = pd.unit.cost'.

Enhancement – POS/PO: Shop address and right justify prices

The Shop Address has been added to the POS PO and the Shop Logo is now centered in the header. The Line Item prices are now right justified.

EME Audio & Video Systems 2950 Mall Drive Eau Claire, WI 54701 715-287-3335				Purchase Order PO #7193 9/29/2005 Ship To: Shop Warehouse:	
BTX 5 Skyline Drive Hawthorne, NY 10532 United States		EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937 Ph: 715-287-3335 Ext: Fax: 715-287-4464 email: horizon@triwest.net			
Need By	Reference	Ship VIA	FOB	Terms	Buyer
					Tina McKnight
Qty	Description			Price	Total
1	ea Male D-SUB 9 pin screw terminal connector			15.95	15.95
1	ea Female D-SUB 9 pin screw terminal connector			15.95	15.95

Enhancement – Master Tracker: Real Date Indicator Flag

The Master Tracker automatically sets the Date of Project Milestones/Tasks when they are created based on the Tracker Defaults. These are Temporary Placeholder dates. When you change the Phase Dates or individual Milestone/Task dates (in the Master Tracker or Project Tracker) to the Actual Date, the Real Date flag is checked. This lets you know that the Date is the Real Date and not the Temporary Placeholder date.

Find Items Show All Proposals Projects & CO's Change Orders Completed Tasks Appointments		Master Tracker Wednesday June 13, 2012 User: Jim Engandela 52 Items 689 Total		Milestones Proposals Due Install Phases Payments Due Purchasing Due All Milestones		Gantt Calendar Tracker
New Task New Appointment	Today This Week This Month Next Month Past Items					Home Leave Email All Print Menu
Adm Mgr User	Real Date Due Date Tracker Item	Proposal Project		Item Owner		Total Labor Total Pymts
	Month - Day Appoint Time	Client - Company Proposal/Project Title		Email Status/Notes		120:22 \$37,791.91
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	6/13/2012 Jun - Wed	Proposal Task - Review Design & Engineering Review Review client profile with Engineering		1291.1-1.100 LeRoy Asher Home Entertainment System		Jon Oster No email
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	6/13/2012 Jun - Wed	Proposal Task - Review Design & Engineering Review Review client profile with Engineering		1292.1-1.100 LeRoy Asher Home Entertainment System		Jon Oster No email
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	6/14/2012 Jun - Thu	Proposal Task - Followup Send letter to Client Send Post interview letter to client		1283.1-1.100 Hayes Callahan Home Theater System		Jim Engandela No email

Project Tracker - Install Phase Dates Mr. Jim Engandela Horizon Software 1288.1-1.100		Done Options	
Install Phases - Start Dates		Retain Changed Install Dates Auto Update - Remaining Phase Dates Auto Update - Related Tracker Task Dates	
? Real Date 1 - Rewire <input checked="" type="checkbox"/> 6/14/2012		<input type="button" value="Done Full Auto"/>	
2 - Trim <input type="checkbox"/> 7/14/2012		Retain Changed Install Dates Do not Auto Update - Remaining Phase Dates Auto Update - Related Tracker Task Dates	
3 - Final <input type="checkbox"/> 8/13/2012		<input type="button" value="Done Semi Auto"/>	
Project Completion <input type="text" value="11/11/2012"/>		Retain Current Install Dates Do not Auto Update - Remaining Phase Dates Do not Auto Update - Related Tracker Task Dates	
		<input type="button" value="Cancel Manual"/>	

Project Tracker - Install Phase Milestones

Project Sold Date: 4/25/2007

?

Home

Mr. Jim Engandela

Horizon Software

1288.1-1.100

Done

Install Phases

Payments

Project Tasks

Due Dates are based on the Install Phase Dates

Install Phase Milestones

New-3 Phase Pre-Trim-Final

Hide	Done	Done Date	Phase	Real Date	Phase Date	Install Milestones	Owner
<input type="checkbox"/>	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	6/14/2012	<div>Phase 1 - Prewire - Installation</div> <div>Jim Engandela</div> <div> <div>Payments</div> <div>Purchasing</div> <div>Installations</div> <div>Invoicing</div> </div> <div> <div>Sent</div> <div>Rcvd</div> <div>Ordered</div> <div>All Rcvd</div> <div>Scheduled</div> <div>Completed</div> <div>Sent</div> <div>Paid</div> </div>	
<input type="checkbox"/>	<input type="checkbox"/>		2	<input type="checkbox"/>	7/14/2012	<div>Phase 2 - Trim - Installation</div> <div>Jim Engandela</div> <div> <div>Payments</div> <div>Purchasing</div> <div>Installations</div> <div>Invoicing</div> </div> <div> <div>Sent</div> <div>Rcvd</div> <div>Ordered</div> <div>All Rcvd</div> <div>Scheduled</div> <div>Completed</div> <div>Sent</div> <div>Paid</div> </div>	
<input type="checkbox"/>	<input type="checkbox"/>		3	<input type="checkbox"/>	8/13/2012	<div>Phase 3 - Final - Installation</div> <div>Jim Engandela</div> <div> <div>Payments</div> <div>Purchasing</div> <div>Installations</div> <div>Invoicing</div> </div> <div> <div>Sent</div> <div>Rcvd</div> <div>Ordered</div> <div>All Rcvd</div> <div>Scheduled</div> <div>Completed</div> <div>Sent</div> <div>Paid</div> </div>	

Project Tracker - Payment Milestones

?

Home

Mr. Jim Engandela

Horizon Software

1288.1-1.100

Done

Install Phases

Payments

Project Tasks

Due Dates are based on the Install Phase Dates

Payment Milestones

Hide	Done	Done Date	Phase	Real Date	Due Date	Payment Milestones	Payment Amount	Task Owner
<input type="checkbox"/>	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	4/25/2007	Deposit - Payment	\$695.94	Sandy Engandela
<input type="checkbox"/>	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	6/4/2012	Phase 1 - Prewire - Payment	\$2,087.82	Sandy Engandela
<input type="checkbox"/>	<input type="checkbox"/>		2	<input type="checkbox"/>	7/4/2012	Phase 2 - Trim - Payment	\$1,391.88	Sandy Engandela
<input type="checkbox"/>	<input type="checkbox"/>		3	<input type="checkbox"/>	8/3/2012	Phase 3 - Final - Payment	\$2,087.82	Sandy Engandela
<input type="checkbox"/>	<input type="checkbox"/>		3	<input type="checkbox"/>	8/23/2012	Retainer - Payment	\$695.94	Sandy Engandela

New Task/Appointment

Project Tracker - Tasks & Cues

?

Home

Mr. Jim Engandela

Horizon Software

1288.1-1.100

Done

Install Phases

Payments

Project Tasks

Due Dates are based on the Install Phase Dates

View by Phase All

Project Tasks

Hide	Done	Done Date	Phase	Real Date	Due Date	Tasks	Task Type	Description	Task Owner
<input type="checkbox"/>	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	6/4/2012	Purchase Prewire	Purchasing	Create PO's for Prewire Phase	
<input type="checkbox"/>	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	6/9/2012	Wire Drop Schedule	Documentation	Print Wiring Chart	Jim Engandela
<input type="checkbox"/>	<input type="checkbox"/>		1	<input checked="" type="checkbox"/>	6/19/2012	Review prewire phase	Review	Check for accuracy	
<input type="checkbox"/>	<input type="checkbox"/>		2	<input type="checkbox"/>	6/29/2012	Purchase Trim Products	Purchasing	Create PO's for Trim Phase	
<input type="checkbox"/>	<input type="checkbox"/>		2	<input type="checkbox"/>	7/19/2012	Review trim phase	Review	Check for accuracy	
<input type="checkbox"/>	<input type="checkbox"/>		3	<input type="checkbox"/>	7/29/2012	Purchase Final Products	Purchasing	Create PO's for Final Phase	
<input type="checkbox"/>	<input type="checkbox"/>		3	<input type="checkbox"/>	8/13/2012	Programming	Engineering	Make sure all systems work	Jim Engandela
<input type="checkbox"/>	<input type="checkbox"/>		3	<input type="checkbox"/>	8/23/2012	Punch List Walk	Engineering	Walk through and check install	
<input type="checkbox"/>	<input type="checkbox"/>		3	<input type="checkbox"/>	8/28/2012	Review final phase	Review	Review with project manager	

Fix – Proposal/Wire Supplements: Adjust Bulk Wire Home Runs

Adjusting Bulk Wire Home Runs from the Wire Supplements screen now adjusts all of the Bulk Wires like it did from the Client Project screen. The Adjustment now factors in the Product Qty, so regardless if Bulk Wires are Itemized or not, the Wire Qty reflects the Total Wire length.

Areas	Text	Products
Labor	Parts	Wire

Zone - Area	Qty	Make : Model	View	Class	Bulk Run	Wire Qty	Wire & Cable	No	Install	Tax	Unit Sell	Ext Sell
Atrium	2	Linn : Akito	Q	Bulk	Home	780 ft	Linn : Bulk Analog		1	T	\$4.25	\$3,315.00

Fix – Proposal/Areas & Products/Pure Parts & Wire Supplements: Return to Proposal

After adding a Pure Parts or Wire Supplement to a Proposal you now stay in that Proposal instead of being kicked out and having to re-enter the Proposal again.

Fix – Proposal/Print Menu/Shop: Master Product Delivery Form increase print lines

The Master Product Delivery Form now displays more Product information.

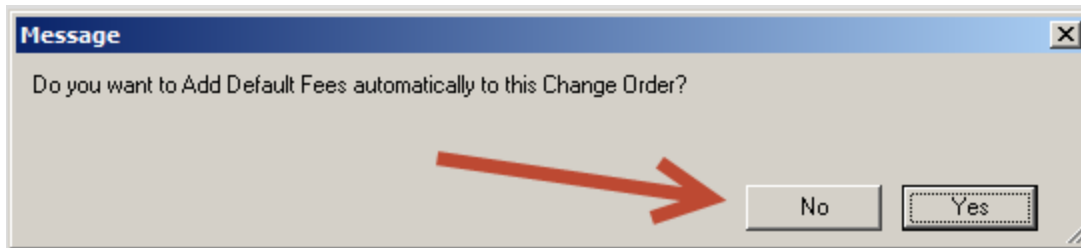
Fix – Proposal/Utility: Update Proposal Product Info for just this Proposal

This update utility now only affects the proposal you are in and not all proposals.

Proposal	Export	Admin
Sell this Proposal Convert this Proposal into a Project All Option Products and Supplements will be Deleted from this Proposal		
Update All Proposal Products & Supplements All products and supplements (Parts/Wire/Labor) in this Proposal will be completely updated with the same products & supplements from the Product Library		
Update Only Proposal Products, Parts & Wire Prices This does not update Labor Supplements		
Update Only Proposal Product Info - not Prices Product descriptions & specs, etc. but not Prices		
Update Product Groups & Supplements to the Product Library Groups This resets the Product Groups and Supplement Disciplines on the products in this proposal		

Fix – Project/Change Orders: Choosing No Fees adds Fees without Defaults checked

When you create a new Change Order you have the Option to Add the Fees but not use the Master Preferences Fee Default checkboxes. This was not working properly and has been fixed.



Report Header Additional Fees Pending Change Order - Project Fees Mike & Jessica Potter Custom Audio & Video System 1285.1c3-1.100

Projects Services Expenses

New Project Fees

Pick	Fee Type	Fee SKU	Phase	Description	Fee Type	Percentage	Percent of	%	Flat Fee	Cost %	Tax Status	Fee Total	Direct to Parts
<input type="checkbox"/>	Design/Engineering		1		Percentage	Equipment	2.0	%		40	E E		<input type="checkbox"/>
				Design and Engineering of the following electronic systems: Home									
<input type="checkbox"/>	Documentation		2		Flat Fee			%	\$50.00	50	E E		<input type="checkbox"/>
				Digital Photos of the prewire and final installation taken, cataloged and									

Fix – Project/Purchase Orders: Fix Qty To Order so that it equals Qty Sold – Qty Staged

Newly created Projects were not accurately calculating the To Order Qty which is based on the Qty Sold – the Qty Staged. The calculation was referencing the wrong fields and this has been corrected.

All Phases Phase 1 2 3 Purchase Orders - All - 3 Products PO WO SI ? Home

LeRoy Asher 1290.1-1.100

Products 10

Global Buy Pkg Off

PO Products PO Parts PO Wire Sum Proj Orphan

Phase	Zone - Area	#	Qty Sold	Make : Model	Updated - Master Cost	Finish	Project Cost	Ver	Qty Staged	To Order Qty	Qty Ordered	Qty Recvd to date	Back Order
2		7 ea		Klipsch : R-2650-W	6/2/2011	White	\$68.00	Klipsch Audio	2	5			

Define Fields for "Main.fp5"

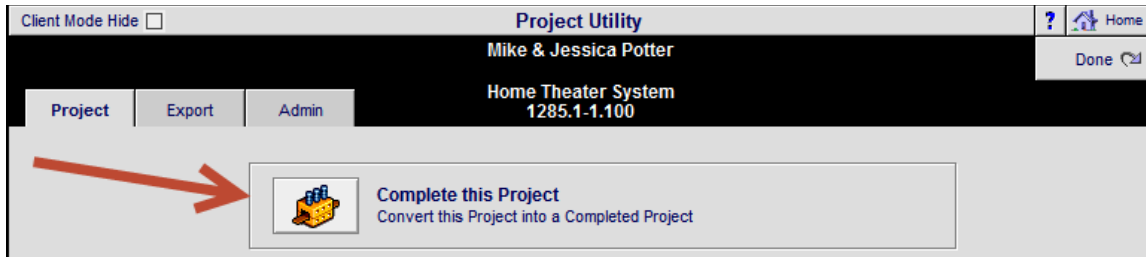
1434 field(s)

Add Mega

Field Name	Type	Options
zi.inv.propSoldQty...	Calculation	Unstored, = Case(pref~one::zxi.invProjLbl="Proj",mLine~prop::pd.qty,mLine~prop::pd.qtySumFinishMega,c)

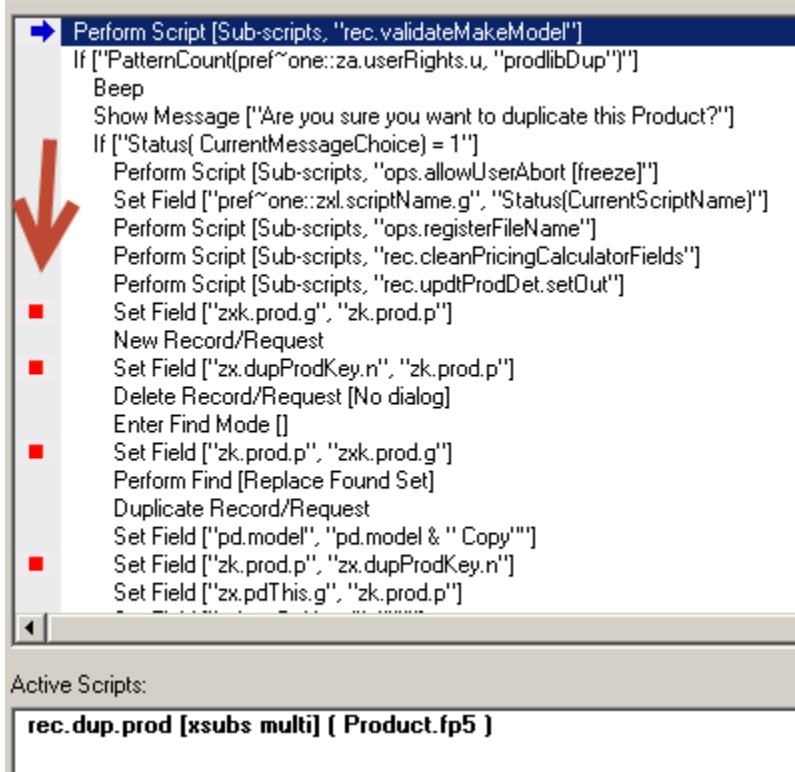
Fix – Project/Utility: Conversion to a Completed Project - Date

When Completing a Project you will now be cued to either set the completed date manually or have it auto set, regardless if the Master Tracker Preference is set to "No Tracker Tasks or not"



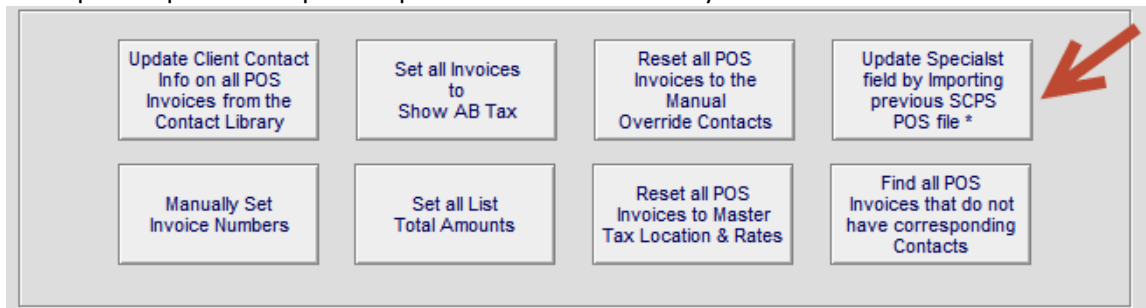
Fix – Product Library/Product Detail: Duplicating Products with Override Labor

SCPS now properly Duplicates a Product that has Override Labor instead of Group Labor assigned to it. The Override Labor is now duplicated.



Fix – POS/Utility: Update Specialist field Import Map

The Update Specialist Import Map has been restored to key off of the invoiceKindNum.c field.



SCPS Version 9.3v4

Released: 5/17/2012

Enhancement – Contact/Find Contacts: Find by creation or modification date range

You can now find Contacts by their creation or modification date, using the Find Contacts button.

The screenshot shows a dialog box titled "Find Contacts". In the "Date Range" section, there are two input fields: "Contact Creation Date:" and "Contact Modified Date:". A red arrow points to the "Contact Creation Date:" field. Below these fields, there is a text prompt: "Enter a Before this Date < or after this date > symbol before the date." and two examples: "<1-1-2008 will find all of the Contacts before that date." and ">1-1-2008 will find all of the Contacts after that date."

Fix – Proposal/Pick Products: Remove Validate Make Model - all screens but Product Detail

A Validation of Make/Model occurs when using Find Products when Picking Products and this has been removed from all screens except the Find Products button on the Product Detail screen where is used to prevent orphaned proposal products. (Product.fp5 script= fnd.goFndKind = If(statusCurrentLayout=("prddet.prod"),recValidateMakeModel)

Fix – Proposal/Print Menu: Reports File Margins

Adjust the Print Margins on all of the User Reports layouts. This Reports files carries a 9.3v4 rev.

Fix – POS/Utility: Update POS Specialist Name from old POS file

A new Import Merge Map uses a new calculated field. This field must be added to the source POS file for the import to work when the source file is prior to 7.3v4.

invoiceKindNum.c = invoiceKind.c & Invoice Number (text)

Fix – Contact/Utility/Export Contacts: Exporting Contacts

Exporting Contacts now enables you to adjust the field map, the file type and the location of the saved file.

The screenshot shows a dialog box titled "Export Contacts". It contains five buttons with red double-headed arrows below them: "Export All Contacts", "Export Contacts to Outlook", "Export Contacts to iContact", "Export Contacts to WinFax", and "Export Contacts to Pilot". Below the "Export All Contacts" button, there is a list of fields: "Company", "All Contact Names", "Fav Address", "Fav Phone", "Fav Email Address", and "All Email Addresses for All Names". Below the "Export Contacts to Outlook" button, there is a list of fields: "Category", "Phone Numbers", and "Primary email address.". Below the "Export Contacts to iContact" button, there is a list of fields: "Favorite Company", "Name", and "Email Address".

SCPS Version 9.3v3

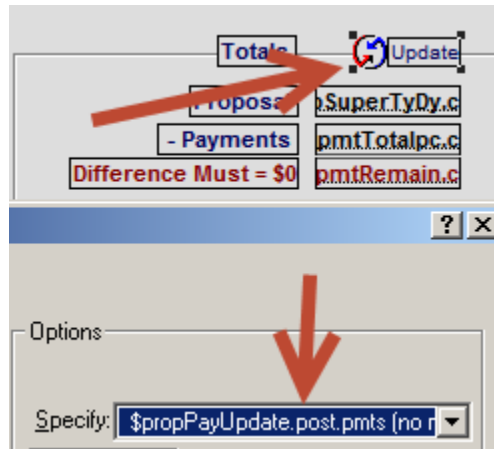
Released: 5/10/2012

Fix – Proposal/Payment Terms: Updating Proposal Payments resets them to Master Defaults

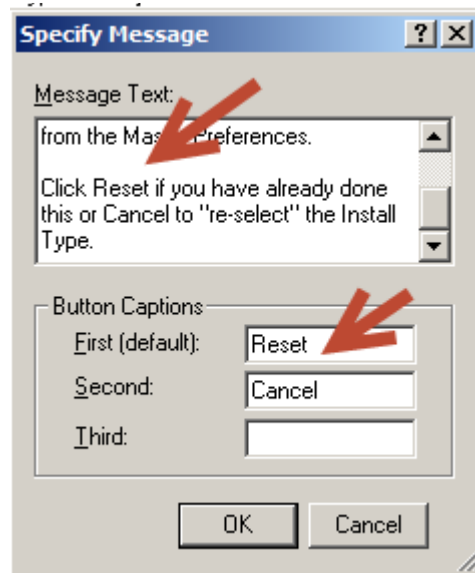
The Payment Total Update button, no longer resets the Install Type to the Master Prefs Payment defaults and retains your manual changes. The Install Type Updater button has been renamed to "Reset". The Payment Method Updater button has been removed. (9.3v1 and 2 users should have this fix)

Clear All Manual Payment Amounts		Proposal - Payment Terms				Print	?
Dealer Payment Plans		Mr. & Mrs. Christenson North American Fly LTD Home Entertainment System 1289.1-1.100				Done with Update	
		Installation Type New-3 Phase Pre-Trim-Final				Installation Type New-3 Phase Pre-Trim-Final	
		<div> <div>Installation Type</div> <div>Reset</div> </div>				<div> <div>Payment Method</div> <div>Percentage</div> </div>	
		Payment Steps					
		Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback	
Payment Labels		Deposit	Payment 1	Payment 2	Payment 3	Hold Back	
Payment Description		Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.	
Percentage Total: 100%		10 %	20 %	20 %	30 %	20 %	
Total Payments: \$12,357.46		Amount \$1,235.75	Amount \$2,471.49	Amount \$2,471.49	Amount \$3,707.24	Amount \$2,471.49	
Payment Step Director		Phase 1 Total \$		Phase 2 Total \$		Phase 3 Total \$	
<div> <div>Step 1</div> <div>Step 2</div> <div>Step 3</div> </div>							
Payment Director		1	2	3			
Products		1	2	3			
Labor		1	2	3			
Parts		1	2	3			
Wire		1	2	3			
Fees		1	2	3			
						<div> <div>Totals</div> <div>Update</div> </div>	
						<div> <div>Proposal</div> <div>\$12,357.46</div> </div>	
						<div> <div>- Payments</div> <div>\$12,357.46</div> </div>	
						<div> <div>Difference Must = \$0</div> <div>\$0.00</div> </div>	

Connect Total Updater button to new script.
The Payment Method Updater has been removed.

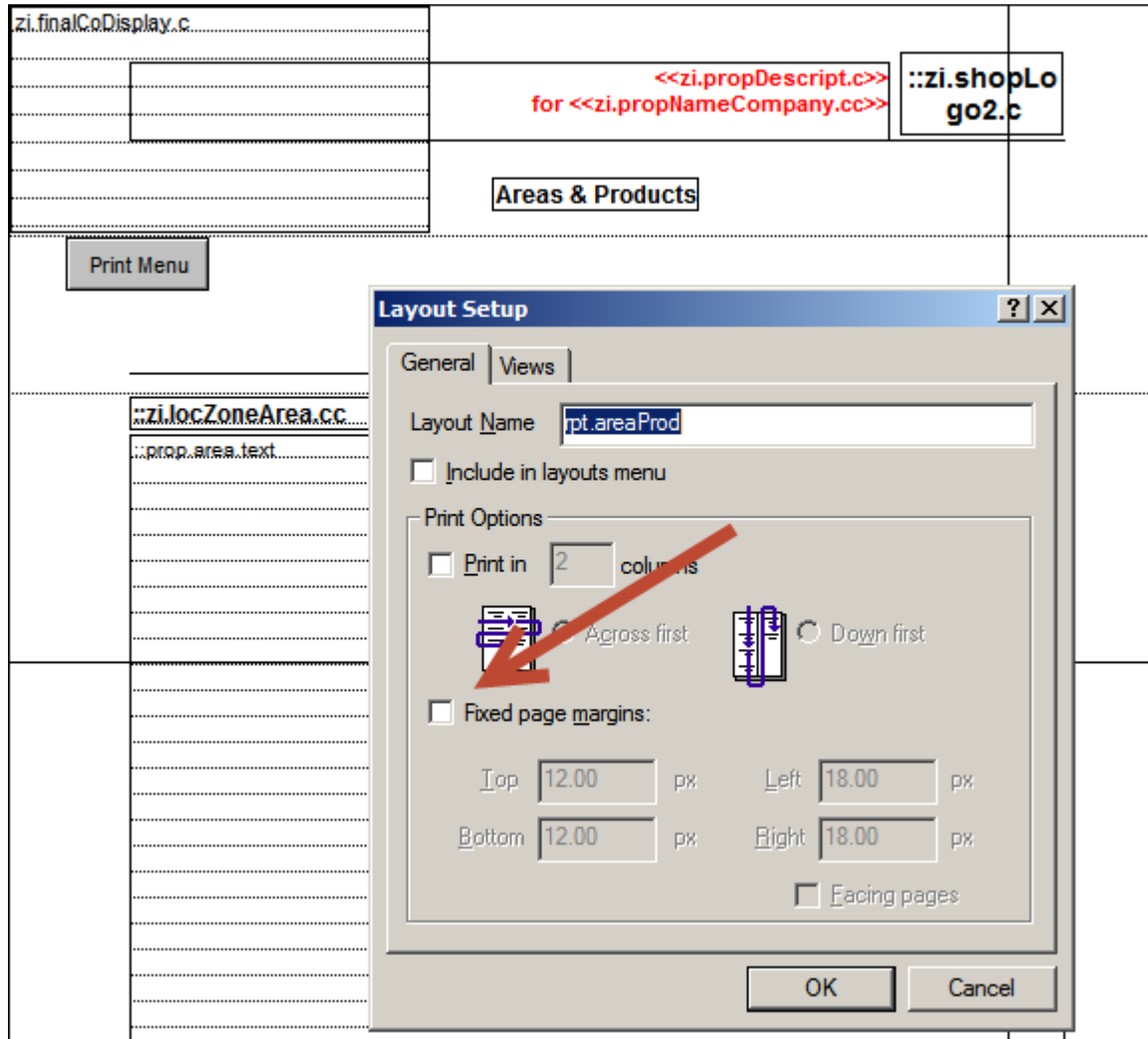


Re-Label Install Updater to "Reset".
 Rename mPref script to \$propResetPhasesPerInstall Type (xsub main).



Fix – Proposal/Print Menu/Areas & Products Reports: Improve Footer clipping

When Printing the Areas & Product sections on some printers the bottom of the Footer can get cut off. This has been corrected by removing the Fixed Page Margin checkbox. (9.3v1 users should have this fix)



Released: 5/3/2012

You now have the option to show the Clients Favorite Phone Number on the Cover Page of your Proposal. You can set this option in the Master Prefs/Proposals/Cover Page screen or in the Proposal/Print Menu/Preferences/Cover Page screen. If this option is empty, the Fav Phone number will show on the Cover Page.

[illegible]

Enhancement – Proposal/Project/Wire Manager: Improve GUI and Report Population

The Wire Manager screen GUI has been improved for better clarity and usage.

The Wire Manager Wiring Chart Report has been improved to show all Product Install Notes and to organize wires and cables underneath the Products they are attached to.

The Wire Manager screen/Report can be sorted by Zone/Area or by Discipline and the default for this can be set in the Master Preferences/Other/Project 2 screen.

Install Notes for End Products are auto entered when you Assign the End Product. These notes can be over written using the Override Install Notes field.

Install Notes for Head Ends should be entered on the next line of the Head End field and it will show on the Wire Chart Report.

Head End		Proposal - Wire Manager						Sorted by Zone/Area		Print Setup				
<div>Head Ends</div>	Select a Head End and Assign it to a Product End	Source Product <div>Install Locations</div>	Mike & Jessica Potter						Discipline	Zone/Area	Wire Chart	Done		
			Security System 1282.1-1.100						Discipline Type	Zone/Area Type	Wire Labels	AutoSet Wire ID's		
									Zone/Area Make/Model Wire ID		Zone/Area Make/Model Wire ID			
									Add Head End notes in Head End field					
Discipline		Source Product		Wire Connected To		End Product or Head End								
Type	Product Install Notes		Wire Class	Wire Make - Model	Assign End >	Product Install Notes	Override Install Notes	Wire ID						
Audio	1 - Basement - Linn : Katan		Bulk	Linn : K20 Cable	Product	1 - Basement - Linn : 5101 Personal Handset		Src-0001						
Bookshelf	Install Location Notes		Room Run	Loudspeaker cable	Head	Install Location Notes		End-0001						
Audio	1 - Basement - Linn : Katan		Bulk	Linn : K20 Cable	Product	1 - Basement - Linn : 5101 Personal Handset		Src-0002						
Bookshelf	Install Location Notes		Room Run	Loudspeaker cable	Head	Install Location Notes		End-0002						
Audio	1 - Basement - Linn : Katan		Bulk	Linn : K20 Cable	Product	1 - Basement - Linn : 5101 Personal Handset		Src-0003						
Bookshelf	Install Location Notes		Room Run	Loudspeaker cable	Head	Install Location Notes		End-0003						
Audio	1 - Basement - Linn : Katan		Bulk	Linn : K20 Cable	Product	1 - Basement - Linn : 5101 Personal Handset		Src-0004						
Bookshelf	Install Location Notes		Room Run	Loudspeaker cable	Head	Install Location Notes		End-0004						
Audio	1 - Basement - Linn : Katan		Bulk	Linn : K20 Cable	Product	1 - Basement - Linn : 5101 Personal Handset		Src-0005						
Bookshelf	Install Location Notes		Room Run	Loudspeaker cable	Head	Install Location Notes		End-0005						
Video	1 - Basement - Runco : CL-610		Pre-Cut	Monster : HDMI400-1M	Product	1 - Basement - Linn : 5101 Personal Handset		Src-0034						
DLP Video	Install Location 7			1m HDMI400 Super-High	Head	Install Location Notes		End-0034						

4/28/2012

EME Audio & Video Systems

Page 1

Wire & Cable Chart

Sorted by Zone/Area

Mike & Jessica Potter
Security System
1282.1-1.100

Type	Qty	Source	End		
Bulk/Pre Cut	Source ID	Zone - Area - Make : Model	Zone - Area - Make : Model	End ID	Done
		Source Install Notes	End Install Notes		
1 - m - Basement					
Bookshelf		1 - Basement - Linn : Katan	1 - Basement - Linn : 5101 Personal Handset		
		Install Location Notes	Install Location Notes		
B	75 ft	Src-0001	Loudspeaker cable - Linn : K20 Cable	End-0001	
B	75 ft	Src-0002	Loudspeaker cable - Linn : K20 Cable	End-0002	
B	75 ft	Src-0003	Loudspeaker cable - Linn : K20 Cable	End-0003	
B	75 ft	Src-0004	Loudspeaker cable - Linn : K20 Cable	End-0004	
B	75 ft	Src-0005	Loudspeaker cable - Linn : K20 Cable	End-0005	
DLP Video Projector		1 - Basement - Runco : CL-610	1 - Basement - Linn : 5101 Personal Handset		
		Install Location 7	Install Location Notes		
P	1 ea	Src-0034	1m HDMI400 Super-High Performance A/V Cable - Monster : HDMI400-1M	End-0034	
DVD Player		1 - Basement - Sony : DVP-NS999ES	1 - Basement - Linn : 5101 Personal Handset		
		Install Location 5	Install Location Notes		
P	1 pr	Src-0036	Pair of phono-phono leads (Black cable) - Linn : Black Interconnect	End-0036	
Keypad		1 - Basement - Linn : Knekt RCU	1 - Basement - Linn : 5101 Personal Handset		
		Install Location 7	Install Location Notes		
P	1 ea	Src-0030	Terminated CAT5 Knekt cable - 40m - Linn : CAT5-40m	End-0030	

Enhancement – Project/Project Info: Project Title

You can now change the Project Title from within a project without having to convert it into a Proposal.

Master Project - Project Info

Client: Mike & Jessica Potter
Project: Home Theater System
1285.1-1.100

Proposal-Project Title: Home Theater System

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

Hourly Labor Rates

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

Install Phase Dates

Start Dates

1 - Prewire: 4/15/2011
2 - Trim: 5/15/2011
3 - Final: 6/14/2011

Completion Date: 9/12/2011
Update all Completed Tasks: [X]

Project WO Install Notes

Enhancement – Project/PO's, WO's, SI's: Orphaned Product Indicator

A red icon indicates that this is an Orphaned Product.

Prior to SCPS 9.3 if you changed the Model number on a product in the Product Library and it belongs to a Proposal/Project, then it is no longer connected to the MainLine record and the Sum View Qty, of like kind items, will not be accurate.

The Product Library now does not allow you to change the Model number of a Product if it is in a Proposal/Project and requests that you duplicate the product and then change the Model number.

Purchase Orders - All - 24 Products

John & Mary Smith
1284.1-1.100

Products: 28
Global Buy Pkg Off: [X]

PO Products: PO Parts: PO Wire: Sum: Proj: Orphan

Phase	Zone - Area	CO#	Qty Sold	Make : Model	Updated - Master Cost	Finish	Project Cost	Vendor ?	Avg PO Cost	Qty Staged	To Order Qty	Enter PO Qty	Sum Mode - PO Status	Qty Ordered	Recvd to date	Back Order
3			1 ea	Klipsch : RC-35	9/26/2011 \$210.00	Black Ash	\$210.00				-2	1				
3			1 ea	Klipsch : RF-35	9/26/2011 \$262.50	Black Ash	\$262.50				-4	2				
3			2 ea	Klipsch : RS-7	9/26/2011											
3			1 ea	Klipsch : RSW-1	9/26/2011											
3			1 ea	Linn : 5101 Pers	9/26/2011											
3			1 ea	Linn : 5125	9/26/2011											
3			2 ea	Linn : Classik M	9/26/2011											

Message: A red icon indicates that this is an Orphaned Product. Prior to SCPS 9.3 if you changed the Model number on a product in the Product Library and it belongs to a Proposal/Project, then it is no longer connected to the MainLine record and the Sum View Qty, of like kind items, will not be accurate.

Enhancement – Project/Change Orders: Sort Products keeping – and + items together

It is helpful for clients to view change order items grouped together by items with the positive and negative items together. All Change Order print options such as with/without page breaks and with/without Disciplines, etc now sort in this manner.

Home Entertainment System Change Order for Mike & Jessica Potter

	Qty	Ext. Price
Atrium		
The equipment rack will contain all of the electronic equipment necessary to operate the system. a locking door will secure the rack. all electronic equipment will be protected from ac spikes by automatic ac surge protector.		
Linn : 5101 Personal Handset : Universal learning remote : Black	1 ea	\$390.00
Linn : 6000 : Universal learning remote : Black	2 ea	\$780.00
Linn : Basik 3 IR : 3 Button RCU : Black	1 ea	\$250.00
Linn : Basik 3-W : Basic 3 Button RCU : White	1 ea	\$225.00
Klipsch : 5101 Personal Handset : Center Channel Speaker : Black Ash	1 ea	\$399.00
	Equipment	\$2,044.00
	Installation	\$1,195.83
	Misc. Parts	\$3,050.00
	Wire & Cable	\$3,955.50
	ATRIUM	\$10,245.33
Zone 1 - Home Theater		
Linn : 5125 : Five channel power amplifier (Black) : Silver	1 ea	\$2,750.00
Linn : 5125 : Five channel power amplifier (Black) : Silver	-1 ea	-\$2,750.00
Linn : Katan : Bookshelf loudspeakers: pair : Black	2 pr	\$1,990.00
Linn : Katan : Bookshelf loudspeakers: pair : Black	-2 pr	-\$1,990.00
ZONE 1 - HOME THEATER		

Enhancement – Project/Change Orders: Posted CO Totals for increased speed

Instead of the Change Order Total being calculated for each Change Order when entering this screen, they are now posted numbers. This greatly increases the speed of this screen when you have a large number of Change Orders. The upgrade process automatically posts these totals on all of your Change Orders.

Master Project - Current Change Orders							
Mike & Jessica Potter							
Home Theater System 1285.1-1.100							
Current Change Orders							
View	Status	Date Created	CO Number	Change Order Title	CO Total	Amts Made	Balance Due
	Final	12/27/2011	1285.1c1-1.100	Home Entertainment System	\$3,855.06		\$3,855.06
	Final	4/3/2012	1285.1c2-1.100	Home Entertainment System	\$3,302.15	\$111.00	\$3,191.15
	Pending	1/31/2012	1285.1c3-1.100	Audio Distribution System	\$0.00		
	Pending	1/31/2012	1285.1c4-1.100	Home Entertainment System	\$1,880.93		
	Pending	1/31/2012	1285.1c5-1.100	Home Entertainment System	\$0.00		

Enhancement – Product Library/Product Detail: Trap changing model numbers

Preventing model number changes on Products that exist in Proposals/Projects is important so that each product is unique which makes summing like kind items in Project Invoices/Work Orders and Purchases Orders and Staging reports work properly. Instead of simply changing a model number on an existing product in the Product Library you will now need to duplicate that product and then change the Model number on the new product.

Product Library - Product Detail 1 of 153 ? Home

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

Product Created: 1/8/2002
Product is in a Proposal - Project
Sell Price Updated: 9/26/2011
Cost Price Updated: 9/26/2011

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

Make: Linn | Sell Price: \$390.00 ea
Model: 5101 Personal Handsetx
SKU: | Group: Audio : Multi-room : Keypad
Finish: Black | Product Classification: Product
Description: Universal learning remote | Primary Install Phase: 2 Trim
Features: Programmable, high-power, long hand held or table top operation

Message
You cannot change the Model number, because this Product exists in a Proposal - Project. Please Duplicate this Product and then change the Model number.

OK

Inventory

Enhancement – Product Library/All List Views: Discontinued Items Indicator

Items that are Discontinued (checkbox on Product Detail screen) now have a green indicator on the Model number. If you click on the Model Number, the Quantity on Hand will be displayed. Please note: The Qty on Hand will only be accurate if you use the SCPS Inventory Control procedures. If you click on the green Discontinued button all Discontinued items will show in the list. This will help you when quoting these items and deciding if they should be hidden, by clicking on the Hide check box, if you no longer have quantities on hand.

Find Products

Fav A B C Recent

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

Show Products

Show All

Utilities

183 Items

183 Total

Phan

Part

Lab

Wire

Leave

Product Sets

Print Menu

Part

Phantom

All Supps

Inventory Control

Hidden

Discontinued

Bulk

PreCut

EME

audio & video

Detail List

New Product

Show All Groups

Displn

Cat

Type

Class View

Make

Model : SKU

Description

Finish

Sell Price

Cue

Auto Tag

Fav

Hide

Audio	Sourc	CD Player	Linn	Classik Music-B	Integrated CD	Blue	1,550.00 ea			
Audio	Ampli	Surround Receive	Linn	Classik Movie Di-Gx	Integrated	Green	3,995.00 ea			
Audio	Speak	Center Channel	Linn	Ekwalx	Single channel	Black	1,300.00 ea			
Audio	Speak	Floor	Linn	Espek	Floor standing	Black	3,950.00 pr			
Audio	Ampli	Preamplifier	Linn				995.00 ea			
Audio	Ampli	Stereo	Linn				495.00 ea			
Audio	Speak	Powered	Linn				950.00 ea			
Video	Sourc	VCR	Sony				199.00 ea			
Audio	Misc	Final Part	Linn				255.00 ea			
Audio	Speak	On-Wall	Linn				225.00 ea			
Audio	Sourc	Phono	Linn				850.00 ea			

Quantity on Hand

5

OK

Enhancement – POS/Specialist field data-remove lookup and post the user name

The Specialist name field has been changed from a lookup to a standard field that has the user name auto entered when a POS invoice is created. (zi.userThis.c)

Enhancement – POS/Invoices/Setup: This utility now only affects current Invoice

This utility only updates the current Invoice and not all POS Invoices and notifies you if there is no related contact for this POS Invoice.

POS - Invoice Set-Up

Update Contact Info Invoice SI #6990 Done

Primary Contact Modify or Switch Contact

Contact Sandy Engandela

Company

Address

City

St, Zip, Country

Home Phone 715-287-3674

Work Phone

715-287-3456

Fax 1

Email

Select Tax Rate Add New Tax Location

Pick	Location	Tax A	Tax B	Total
<input type="checkbox"/>	Eau Claire	5.50%		5.50%
<input type="checkbox"/>	Menomonie	4.00%	0.50%	4.50%

Enhancement – POS/Quote, Sales Invoice, Change Order Lists: Add Sales Specialist field

The Sales Specialist is now shown in the Quotation, Sales Invoice and Change Order lists and in the Find screen.

Find Quote POS - Quotation List Print Home Archive

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

Quotation Archive Sold Quotes Click on Quotation to view 6 Quotations QT SI CO SO WO PO RA Done

View	Invoice	Client	Company	Specialist	Date	Amount Sold	Archive
<input type="checkbox"/>	QT #7215	Potter, Mike & Jessica		Jim Engandela	4/16/2012		<input type="checkbox"/>
<input type="checkbox"/>	QT #7213	Osterx, Jon		Jim Engandela	4/16/2012		<input type="checkbox"/>
<input type="checkbox"/>	QT #7212	Christenson, Cecilia	Wade Realty	Joel Roberts	4/16/2012		<input type="checkbox"/>
<input type="checkbox"/>	QT #7211	Defiglia, Rudy & Cecila		Jim Engandela	4/13/2012		<input type="checkbox"/>
<input type="checkbox"/>	QT #7198	Potter, Mike & Jessica		Jim Engandela	1/29/2012		<input type="checkbox"/>
<input type="checkbox"/>	QT #7190	Engandela, Jim		Robert	9/29/2005	7,901.74	<input type="checkbox"/>

Enhancement – POS/All Invoices: Phone Numbers and Address 2 Labels

Multiple phone numbers now are displayed on the phone label by removing all blank spaces between them. The Address 2 label now shows the Address 1 Label contents if the Address 2 label contents are empty and the Show option is checked. Also it is no longer necessary to have a Label title entered for the label contents to show.

Print Setup Delete Quote Duplicate Quote POS - Quotation Pick Price Cue Sold 1 of 1 Home

Print: Show List Price Column Quotation QT #7198 Convert Quote to a Sales Invoice Costing Done

Preview: Do not show Labor Detail 1 of 1 Set Up Prev Next

Label Show Hide

Mike & Jessica Potter
567 58TH Street
Oakland, CA 94607

Home 765-287-2378
Work: 265-987-6542
Day Phone 345-876-2345
Alt 1 765-865-3456
Fax 543-987-6543

Jessica Robinson

Mike & Jessica Potter
567 58TH Street
Oakland, CA 94607

12/23/2011

Enhancement – POS/Utility: Update Specialist field from previous SCPS data file

You can now update the Specialist field on all of your POS invoices from a previous POS file. Only the Specialist field data will be updated on your POS Invoices.

POS - Utility Print ? Home Done

Update Client Contact Info on all POS Invoices from the Contact Library

Manually Set Invoice Numbers

Set all Invoices to Show AB Tax

Reset all POS Invoices to Master Tax Location & Rates

Reset all POS Invoices to the Manual Override Contacts

Set all List Total Amounts

Update Specialist field by importing previous SCPS POS file

Import POS from CPS

Always use this Import button to Import POS invoices from a CPS POS file. This button will delete all current invoices, set matching field names, and reset the invoice number to the highest invoice number.

Set New Invoice Starting Number

Current Highest Invoice Number: 7218

Enter a New Invoice Starting Number: [Text Box]

Then click on "Done" button

New Invoice number must be higher than Current Invoice Number

Master Counter: 7211

Set Starting Number

Enhancement – POS/Utility: Find all POS Invoices that do not have Contacts

This utility will show all POS Invoices that no longer have a corresponding Contact in the Contact Library..

POS - Utility

Print ? Home Done

Update Client Contact Info on all POS Invoices from the Contact Library

Manually Set Invoice Numbers

Set all Invoices to Show AB Tax

Reset all POS Invoices to Master Tax Location & Rates

Reset all POS Invoices to the Manual Override Contacts

Set all List Total Amounts

Update Specialist field by Importing previous SCPS POS file

Find all POS Invoices that do not have corresponding Contacts

Import POS from CPS

Always use this Import button to Import POS invoices from a CPS POS file. This button will delete all current invoices, set matching field names, and reset the invoice number to the highest invoice number.

Set New Invoice Starting Number

Current Highest Invoice Number: 7218

Enter a New Invoice Starting Number:

Then click on "Done" button

New Invoice number must be higher than Current Invoice Number

Master Counter: 7211

Set Starting Number

Enhancement – POS/Packing List: Increase lines to 100 items and Expand to 2 Lines

POS Packing Lists now will accommodate up to 100 line items and each line item can be 2 lines in length and both lines will show up on the Packing List.

EME Audio & Video Systems
2950 Mall Drive
Eau Claire, WI 54701
715-287-3335

EME
audio & video

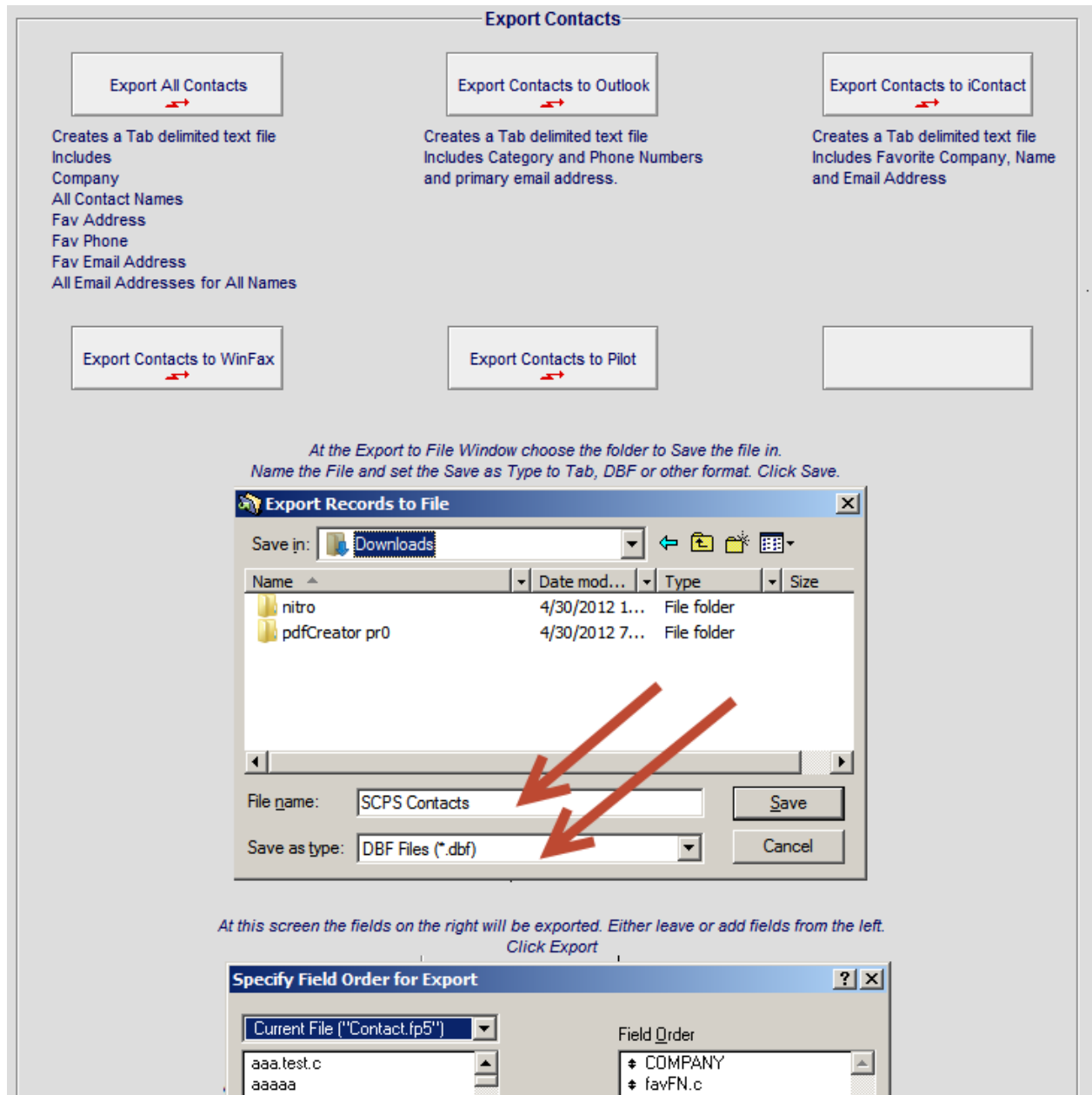
PACKING LIST
SI#6990
8/18/2005

Sandy Engandela1 Home 715-287-3674
715-287-3456

Ship VIA	Payment	Terms	Your #	Our #	Sales Rep
	Cheque	Due Upon Receipt of Invoice			Robert Campol
Ordered	Shipped	QTY	DESCRIPTION		
		1	TOTAL AMOUNT OF BUILDER'S HOLDBACKS FOR PROPOSAL #1374-00V1 **REVISED**		
			*****NOT INCLUDED IN PROJECT*****		
		1 ea	PIONEER : VSX-C302-S : RECEIVER REQUIRED FOR LIVING ROOM PLASMA.		
		1 ea	FUJITSU : P-50XP1-B : PLASMA BRACKET REQUIRED FOR LIVING ROOM PLASMA.		
		1 ea	C.P ELECTRIC LTD INVOICE FOR SUPPLYING 240 VOLTS CONTACT & COIL (SEE COPY OF INVOICE ATTACHED) C.P ELECTRIC LTD INVOICE		
		9.25 hr	SYNERGY EXTRA LABOUR FROM JANUARY 19, 2005 - APRIL 6, 2005 (SEE ATTACHED FOR FULL DETAILS)		
		2 ea	AMX : *VST-DIST : DISTRIBUTION PANEL (CALIBUR COULD NOT SUPPLY THESE PANELS)		
		2 hr	SYNERGY LABOUR - HOOK UP PANELS TO CALIBURS HVAC SYSTEM.		

Enhancement – Contacts/Utilities/Export Contacts: Option to Save File to location

When Exporting your Contacts to a file you now have the option to choose where you want to save the file on your computer and the fields to export and the file format such as tab delimited or DBF etc. Instruction are included at the bottom the screen.



The screenshot shows the EME Audio & Video Systems software interface. The top navigation bar includes 'Find Proposals', 'Fav A', 'B', 'C', and 'Proposals'. The 'Proposals' tab is active. Below the navigation bar is a sidebar with 'Access Levels' (Administrator, Manager, User) and a 'Global Proposal' checkbox. The main content area displays a list of proposals. A red arrow points to the 'C' tab in the top navigation bar, and another red arrow points to the 'Total Fav' column header in the proposal list.

Status	Dup	View	Number	User	Client	Company	Proposal Title	Created	Total Fav
<input checked="" type="radio"/>	<input type="checkbox"/>		1295.1-1.100				Home Entertainment	4/18/2012	A
<input checked="" type="radio"/>	<input type="checkbox"/>		1294.1-1.100	Callahan, Hayes	Triple A		Home Entertainment	4/4/2012	A
<input checked="" type="radio"/>	<input type="checkbox"/>		1292.1-1.100	Defiglia, Rudy & Cecila			Home Entertainment	1/24/2012	A
<input checked="" type="radio"/>	<input type="checkbox"/>		1279.1-1.100	Traaseth, Ann & Bob			Home Automation	9/12/2006	A

Fix – CO showing in Project list

If a Change Order shows up in the Project List instead of the CO list, the value in `zc.statusState` can be changed from “J” to “C”.

Fix – Update Main Line – Mega Prop Keys

Updating MegaProp keys in existing Mainline records enables the Project Invoice, Work Orders and Purchase Order Product Sum feature to function properly on legacy data. Newly added Products now also have their MegaProp keys stamp when they are created. (Upgrade Utility 36)

Fix – Main Line – Stamp Mega Prop Keys on Mainline records during creation

When adding a product to a proposal or a pure labor, parts or wire supplement (which creates a Discipline placeholder record) the Mega Prop key is stamped on the new mainline records.

Fix – POS /New Invoices: Speed up adding invoices and prevent all record lookup

When adding a new POS invoice from the POS dock or from the Contact module the new POS invoice is isolated so that the contact lookup only happens on the new POS invoice and not on all POS invoices. This speeds up the process and prevents other lookup fields on other POS invoices from being changed. Also when you are in the POS invoice screen and you modify the contact name this new isolation process is also engaged.

Fix – Proposal/RCMS Client: Open Phone Number fields

On the RCMS contact screen you can now enter phone numbers in all of the phone number fields.

The screenshot displays the 'Proposal - RCMS - Client' form. At the top, it shows 'Hayes Callahan Triple A' and 'Home Entertainment System 1294.1-1.100'. The form is divided into several sections: 1. 'Enter Phones & click Query' with a phone number '715-276-3987'. 2. 'Click on the RCMS Client' with a list of clients. 3. 'If Client doesn't exist in RCMS, enter info & click add:' with fields for First Name (Hayes), Last Name (Callahan), Company (Triple A), Address (567 58TH Street), City (Oakland), State (CA), and Zip (94607). 4. 'Selected Tax' with a table showing Tax A (5.500%), Tax B (5.500%), and Total Tax (5.500%). 5. 'Home Phone' and 'Work Phone' fields with numbers '715-276-3987' and '715-287-4592' respectively. 6. 'Fax 1' and 'eMail Address' fields with values 'horizon@trivest.net' and 'horizon@trivest.net'. A red arrow points to the 'Work Phone' field.

Pick	Region	Location	Locale ID	Zip	Total Tax
		Eau Claire		54770	5.500%
		Menomonie		54701	4.500%

Fix – Projects/Change Orders: Preference to always add Fees to Change Order

The option in Master Preferences/Other/Project 2 to always add Fees to new Change Orders and not prompt you for this option now works properly.

Fix – Projects/Current Change Orders/: CO Total

The Change Order totals displayed on the CO portal now show the total of each individual CO.

Master Project - Current Change Orders									
Mike & Jessica Potter									
Home Theater System 1285.1-1.100									
Current Change Orders									
View	Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance Due	Del	
	Final	12/27/2011	1285.1c1-1.100	Home Entertainment System	\$3,855.06		\$3,855.06		
	Final	4/3/2012	1285.1c2-1.100	Home Entertainment System	\$3,302.15		\$3,302.15		
	Pending	1/31/2012	1285.1c3-1.100	Home Entertainment System	\$0.00				
	Pending	1/31/2012	1285.1c4-1.100	Home Entertainment System	\$1,880.93				
	Pending	1/31/2012	1285.1c5-1.100	Home Entertainment System	\$0.00				

Fix – Change Orders/Print Options: Change Orders group changed items without Disc

When choosing the option to not group products by Discipline, the products still group by added or deleted products. This has been fixed.

Areas & Products Report

☐ Yes ☒ No Page Break after each Area

☒ Products - Do not Sort products by Discipline

☐ Products - Show Product Install Location

☐ Text - Hide Area Text

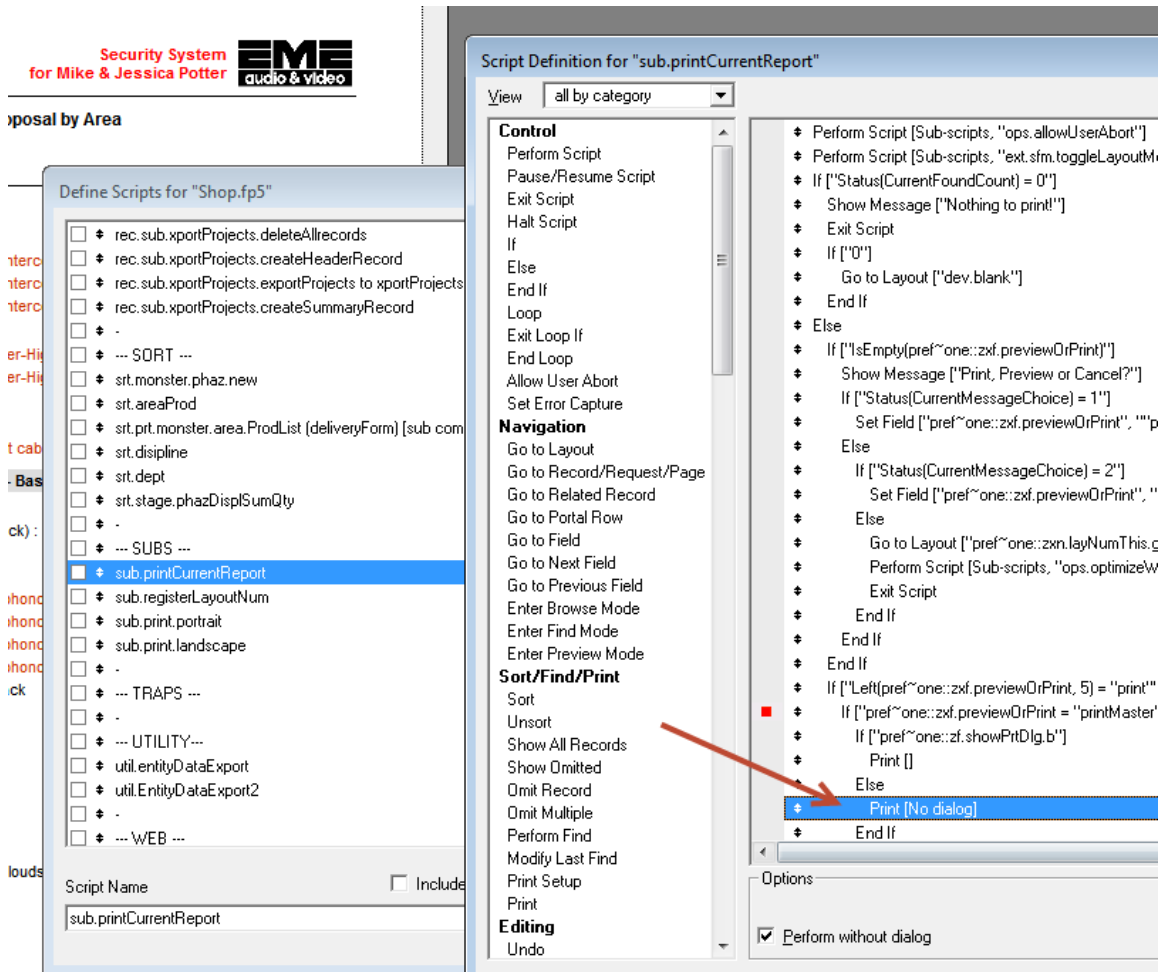
☐ Text - Show only Area Text - No Products

Qty		
Zone 1 - Home Theater		
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	-1 ea	-\$4,950.00
Equipment		-\$4,950.00
Installation		-\$130.00
Misc. Parts		-\$95.00
Wire & Cable		-\$318.75
ZONE 1 - HOME THEATER		-\$5,493.75
Zone 2 - Living Room		
Klipsch : RSW-10 : Reference Subwoofer : Black Ash	-1 ea	-\$1,000.00
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		\$9,900.00
Installation		\$260.00
Misc. Parts		-\$95.00
Wire & Cable		\$637.50
ZONE 2 - LIVING ROOM		\$10,702.50

SCPS Version 9.2v2
Released: 4/4/2012

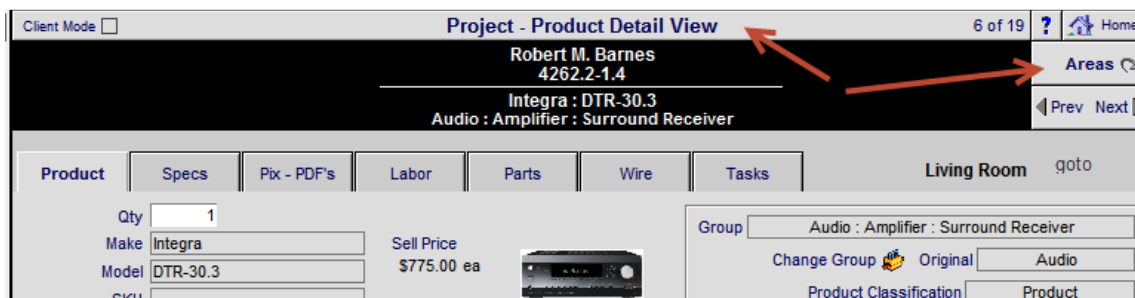
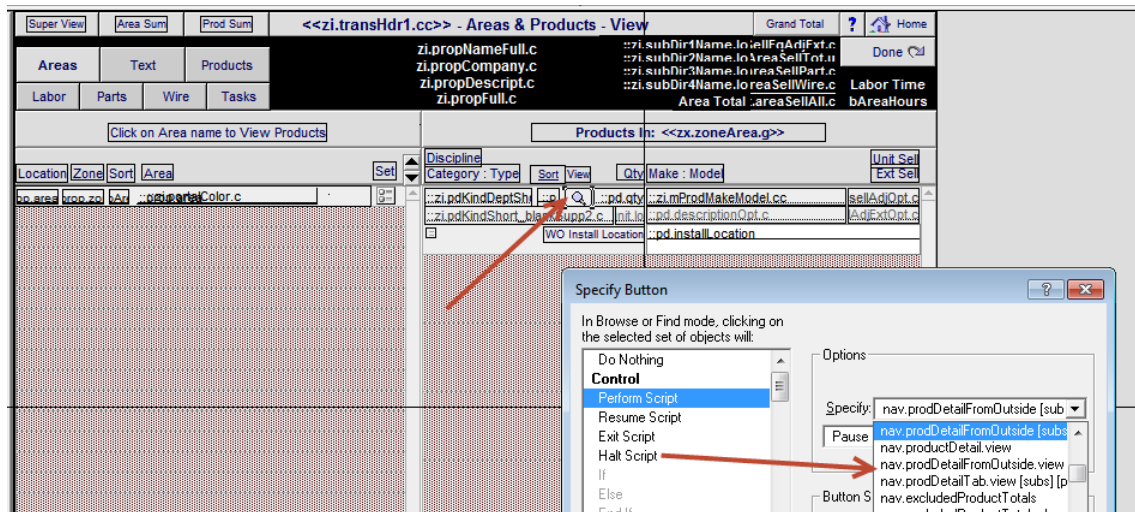
Fix – Proposal/Print Menu/Shop Reports: Print Reports not scripts

Reset the Print subscript for Shop reports.



Fix – Projects; View the Product Detail from the Product Detail View screens

Attach Product View button to Product Detail View script. Add Areas button on all View screens to return to the Areas & Products screen.






Enhancement – Proposal-Change Order/Print Menu: Trap for Payment Terms out of balance

If the Payment Terms do not total the Proposal Total then you will receive a pop up notice of this condition and you will be directed to the Payment screen to correct the problem. Additional payment amount Posting has been inserted into the Print Menu and Utility buttons so to insure that Payment Terms for Proposals, Project, Pending and Final Change Orders are correct before printing.

Enhancement – The Prop key and record status are displayed on the Project Product View

This can be used for deleting bad legacy records

Super View		Area Sum		Prod Sum		Project - Products - View										Client Mode				?		Home	
						Michael Burns														Phantom =		Done	
Areas		Text		Products		Custom Audio & Video System														Install Location Notes		Product Total \$784.65	
Labor		Parts		Wire		Tasks		Show All		4274.1-1.30													
View		Co Status		Zone - Area Discipline Phase		Exclude from Total		Make Category Type		Model Description		Product Labor Parts Labor Wire Labor		Unit List Unit Cost Updated Sell		Adjusted Sell Unit Sell GP%		Extended Sell Ext Installed Discount					
		1 ea		Sun Room Control		<input type="checkbox"/>		Xantech Other IR Kit		LCD IR System		135.00		249.00		236.55		236.55					
		392670 P 3		4274.1		<input type="checkbox"/>		IR Kit		IR Repeater System		114.00		249.00		249.00		384.00					
												0.00		8/17/2011		51.8%		-12.45					
		1 ea		Sun Room Interconnects		<input type="checkbox"/>		AudioQuest Pre-Cut Cable HDMI		Forest 3M		13.42		75.00		75.00		75.00					
		392670 P 3		4274.1		<input type="checkbox"/>		HDMI		HDMI Cable		30.00		75.00		75.00		88.42					
												0.00		8/17/2011		60.0%							
		1 ea		Kitchen Control		<input type="checkbox"/>		Xantech Other IR Kit		LCD IR System		135.00		249.00		236.55		236.55					
		392670 P 3		4274.1		<input type="checkbox"/>		IR Kit		IR Repeater System		114.00		249.00		249.00		384.00					
												0.00		8/17/2011		51.8%		-12.45					

SCPS Version 9.2v1
Released: 3/29/2012

Enhancement – Horizon Info: Subscription Renewal Log, System & Users Stats, Free Capture

A log of Subscription Notifications with User, Date and Time is now kept and accessed from this screen. The System and User Statistics log is now accessed from this screen. A free screen capture program called Jing is now available to download. It's a great program that can help you take screen shots when you are communicating issues to Horizon. Best of all it is free. Also the Horizon SmartPartner Software License agreement has been moved from this screen and accessed with a button.

The screenshot shows the Horizon SmartPartner Software License interface. At the top, there is a header bar with the Horizon Software logo and a 'Done' button. Below the header, the main content area is divided into several sections. On the left, there is a contact information section for Jim Engandela, including his title, office manager, programming, technical support, office hours, phone, fax, address, email, and website. In the center, there are sections for 'Upgrade SCPS Software' (with buttons for Revision List, Upgrade Guides, and Download Upgrade), 'Educational Video' (with a SCPS Overview button), and 'Subscription Renewal' (showing 45 days left and a current code, with buttons for Email Horizon for a New Code, Activate, and Renewal Notice Log). On the right, there are sections for 'Send Email' (with a Send to Horizon button), 'Email Bug Report' (with a Send to Horizon button), 'Send Large Files' (with a Send to Horizon button), 'Horizon Support Policy' (with a Support Policy button), and 'Online Support' (with a list of steps and a button for LIVE HELP). At the bottom, there are three buttons: 'Subscription Renewal Log', 'System and User Statistics', and 'Free Screen Capture Program'. Red arrows point from the text above to these three buttons, indicating new features.

Horizon SmartPartner Software License

President/Developer
Jim Engandela

Office Manager
Sandy Engandela

Programming
Jim Engandela
Dave Dowling

Technical Support
Jim Engandela
Dave Dowling
Joel Roberts

Office Hours:
Monday - Friday
9am - 5pm Central Time

Phone: (715)-287-3335
Fax: (715)-287-4464
Address: Horizon Software
S15700 Hwy U
Strum, WI 54770

Email:
horizon@triwest.net

Website:
www.horizon-software.com

Upgrade SCPS Software

Revision List
New Features,
Enhancements & Bug Fixes

Upgrade Guides

Download Upgrade

Educational Video

SCPS Overview

Subscription Renewal

Subscription 45 Days Left
Current Code 73453826944

Email Horizon for a New Code

Enter your New Code & click Activate.

Activate

Renewal Notice Log

Send Email

Send to Horizon

Email Bug Report

Send to Horizon

Send Large Files

Send to Horizon

Horizon Support Policy

Support Policy

Online Support

1. Call Horizon Software
2. Enter the ID provided by Horizon
3. Click on the Live Help button

Fast Support ID

Go To Meeting ID

click here for LIVE HELP

Subscription Renewal Log

Log

System and User Statistics

Statistics

Free Screen Capture Program

Jing

Enhancement – Logo Screen Utility/System Statistics: SmartPartner Subscription Notice Log

A log is now kept that shows the date, time, user name and remaining days each time the automatic subscription notice is issued by SCPS.

SmartPartner - Subscription Notification Log			
1/29/2012	8:14:06	Jim Engandela	49 Days Remaining

Enhancement – Proposal/Info: Review Request to Project Manager and Approved to Salesman

The Proposal Sales Specialist can now send an email to the Project Manager requesting the Proposal is Reviewed. The Proposal Project Manager can then send an email to the Sales Specialist with the Proposal Approval.

Proposal - Info		Print	?
Client Project		Done	
Mike & Jessica Potter			
Security System		Project Pictures	Maps and Directions
1282.1-1.100			
Info	Contacts	Com Log	
Proposal-Project Info			
Project Reference <input type="text"/>			
Blueprint Reference <input type="text"/>			
Where did you hear? <input type="text"/>			
Client Referred By <input type="text"/>			
Reasons Lost Proposal <input type="text"/>			
Specialist Info Update			
Sales Location <input type="text" value="EME Audio & Video Systems"/>			
2950 Mall Drive			
Eau Claire, WI 54701			
Sales Specialist <input type="text" value="Jim Engandela"/>			
Title <input type="text" value="President"/>			
email <input type="text" value="horizon@triwest.net"/>			
Project Manager <input type="text" value="Dave Dowling"/>			
email <input type="text" value="horizonse@triwest.net"/>			
Project Engineer <input type="text" value="Jon Osterx"/>			
email <input type="text" value="No Client Email Address"/>			
Additional "Client Intro Letter" Signature			
Name <input type="text"/>			
Title <input type="text"/>			
Company <input type="text"/>			
<div><div><input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer</div><div><input type="button" value="Send email"/> <input type="button" value="Request to Review Proposal from Salesman to Project Manager"/> <input type="button" value="Proposal Reviewed & Approved from Project Manager to Salesman"/></div></div>			

Send	From: horizon@triwest.net
	To: horizonse@triwest.net
	Cc:
	Bcc:
	Subject: Request for Proposal Review
<p>Project Manager...</p> <p>Please Review the attached or referenced Proposal and send me an email with your approval.</p> <p>Mike & Jessica Potter Security System 1282.1-1.100 Thank You Jim Engandela Sales Specialist</p>	

Send

From ▾

horizon@triwest.net

To...

horizon@triwest.net

Cc...

Bcc...

Subject: Proposal Approved Notice

Sales Specialist...

The attached or referenced Proposal has been approved.

Mike & Jessica Potter
Security System
1282.1-1.100|

Thank You
Dave Dowling
Project Manager

Enhancement – Proposal/Print Menu: Proposal Print Options: Show Area Text – No Products

The Proposal Print Option, Show Area Text – No Products, now removes both the Qty label and the Price Label from the report. It is also no longer necessary to check the Hide Product Prices option to remove the Pricing label when the Show Area Text – No Products options is checked.

Areas & Products Report - Formatting

☒ Yes
☐ No
Page Break after each Area

☐ Products - Do not Sort products by Discipline

☐ Products - Show Product Install Location

☐ Hide Area Text

☒ Show Area Text - No Products

☐ Sort Areas by: Zone/Location/Placement/Area
Normal Sort = Location/Zone/Placement/Area

The surround sound speaker compliment includes two front music speakers, one center voice speaker and two rear surround speakers. the sub woofer will provide deep bass for realistic movie reproduction.

	Qty	Ext. Price
Audio		
Linn : 5125 : Five channel power amplifier (Black) : Silver	2 ea	\$5,500.00
Linn : Aktiv Modules : Stereo or twin mono Aktive crossover upgrade (treble, mid, bass)	1 ea	\$255.00

The surround sound speaker compliment includes two front music speakers, one center voice speaker and two rear surround speakers. the sub woofer will provide deep bass for realistic movie reproduction.



Equipment	\$25,914.95
Installation	\$1,100.83
Misc. Parts	\$200.00
Wire & Cable	\$3,521.20
Zone 1 - Basement	\$30,736.98

Enhancement – Proposal: Project: Contact: Pix

From the Proposal or Project Info screen you can access this Picture screen. 2 Pix come from the Contact Library for this Contact. 2 Pix can be pasted in for this Project and 2 Large Pix can be stored on your computer and attached to this Project.

DrivePath Utility
Use Edit Menu: Copy/Paste
Contacts - Files & Pix
Add Pix = Delete Pix =
? Home

Lee Christenson
North American Fly LTD

Details Info Com Log Entities **Files & Pix** Transactions

Done

Prev Next
2 of 14

File Attachments

View Label Enter Computer File Paths to reference documents

Contact Pix are stored in the Contact Library and show on all Projects for this Contact.




Pasted Contact Pix are specifically for this Contact.

Large Pix should be saved as files and Attached to this Contact.

Pasted Contact Pix 1

Pasted Contact Pix 1

Attached Contact Pix 1

Pasted Contact Pix 2

Pasted Contact Pix 2

Attached Contact Pix 2

Enhancement – Proposals/Project/Client: Phone Numbers

All Proposal/Project/Change Order/Completed Client screens and reports now show all of the Client Phone Numbers.

Proposal - Client

Lee Christenson
North American Fly LTD
Home Entertainment System
1292.1-1.100

Client Mode ☐ Use Alt Billing ☐

Print Setup Print ?

Done

Client Follow-Up Letters

Client | Project

Info | Contacts | Com Log

Client

Modify or Switch Contact

First Name Lee
Last Name Christenson
Company North American Fly LTD
Proposal Name Christenson
Fav Format SL Title + Last Name

Address

Work 567 58TH Street
Cross Street
City Oakland

Numbers

Home Phone 715-287-4557 Ext
Work Phone 715-695-3533 Ext
Chris mobile 715-287-3987 Ext
Fred Mobile 715-872-8766
Day Phone 715-298-3876
Other Label 1 715-797-3533
Other Label 2 715-797-1238
Other label 3 715-287-8376
Fax 1 715-695-3515

Select Tax Update

Enhancement – Proposal/Info: User Title Field

You can now change the Title on the Project Engineer field to suit.

Proposal - Info

Ann & Bob Traaseth
Home Automation
1279.1-1.100

Send Email

Client ☐ Manager ☐
Salesman ☐ Engineer ☐

Done

Maps and Directions

Client | Project

Info | Contacts | Com Log

Proposal-Project Info

Project Reference
Blueprint Reference
Where did you hear?
Client Referred By
Reasons Lost Proposal

Specialist Info

Sales Location EME Audio & Video Systems
2950 Mall Drive
Eau Claire, WI 54701

Sales Specialist Jim Engandela
Title President
Email horizon@trivest2.net

Project Manager Joel Roberts
Email No Client Email Address

Sales Specialist Jon Osterx
Email No Client Email Address

Additional "Client Intro Letter" Signature

Name
Title
Company

Enhancement – Proposal/Product Sum View/Show All

If you click on the Show all button you will see all of the products in each Zone-Area with their individual quantities.

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

Enhancement – Proposal/All Supplement View

The All Supps view shows you the Labor, Parts, Wire and Task Supplements attached to Products all on one screen. You can click on the All Areas button to show All Supplements or select a Zone-Area to show only the Supplements in that Area.

Super View	Area Sum	Prod Sum	All Supps	Proposal All Supplement View										?	Home		
				Mike & Jessica Potter										Done			
Areas		Text		Products		Security System 1282.1-1.100										Labor Summary	
Labor	Parts	Wire	Tasks													Delete All Labor	
All Areas		1 - Home Theater		Labor Supplements													
Labor assigned to				Zone - Area		Qty	Make : Model	View Edit	Labor Type	<input type="checkbox"/> Sort	Install Phases	Tax A B	Hourly Rate	Total Time with DOD (h:m:s)	Ext Sell		
1 - Home Theater		1	Linn : 5101 Personal Handset					Q	Programming		3	T T	\$80.00	0:30:00	\$40.00		
1 - Home Theater		1	Linn : 5101 Personal Handset					Q	Calibration		3	T T	\$100.00	0:20:00	\$33.33		
1 - Home Theater		1	Linn : 5101 Personal Handset					Q	Wire Labor - Bulk		1	T T	\$60.00	1:15:00	\$75.00		
1 - Home Theater		1	Linn : 5125					Q	Installation		3	T T	\$60.00	1:00:00	\$60.00		
1 - Home Theater		1	Linn : 5125					Q	Wire Labor - Precut		3	T T	\$60.00	0:20:00	\$20.00		
1 - Home Theater		5	Linn : Katan					Q	Installation		3	T T	\$60.00	1:40:00	\$100.00		
Labor Total													15:20:00	\$995.83			
Delete All Labor																	
Parts assigned to				Zone - Area		Qty	Make : Model	View Edit	Parts Qty	Parts Make : Model	Install Phase	Tax A B	Unit Sell	Ext Sell			
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			
1 - Home Theater		1	Linn : Melodik					Q	1 ea Linn : Phono Plugs-Standard		3	T T	\$95.00	\$95.00			
Parts Total													\$295.00				
Delete All Parts																	
Wire & Cable are Itemized				Wire Supplements													
Wire assigned to				Zone - Area		Qty	Make : Model	Class Edit <input checked="" type="checkbox"/> Sort	Bulk Run Type	No Labor	Wire Qty	Wire & Cable Make : Model	Install Phase	Tax A B	Unit Sell	Ext Sell	
1 - Home Theater		1	Linn : 5101 Personal					Q	Bulk	Home	150 m	Linn : K10 Cable	1	T T	\$5.00	\$750.00	
1 - Home Theater		1	Linn : Knekt RCU					Q	Bulk	Home	150 ft	Monster : CAT5 Bulk	1	T T	\$0.80	\$120.00	
1 - Home Theater		1	Linn : Melodik					Q	Bulk	Room	75 ft	Linn : Bulk Analog	1	T T	\$4.25	\$318.75	
1 - Home Theater		1	Linn : Melodik					Q	Bulk	Room	75 ft	Linn : Bulk Analog	1	T T	\$4.25	\$318.75	
1 - Home Theater		1	Linn : Katan					Q	Bulk	Room	75 ft	Linn : K20 Cable	1	T T	\$2.74	\$205.50	
1 - Home Theater		1	Linn : Katan					Q	Bulk	Room	75 ft	Linn : K20 Cable	1	T T	\$2.74	\$205.50	
1 - Home Theater		1	Linn : Katan					Q	Bulk	Room	75 ft	Linn : K20 Cable	1	T T	\$2.74	\$205.50	
Wire Total													\$3,804.95				

Enhancement – Proposal/Labor Summary

The Labor Summary screen can now be accessed from several other screens and shows the Hourly Labor Rates, Labor Time by Phase and Labor Amount by Phase for the entire Proposal.

3		Proposal - Labor Summary		Print	Home
		Mike & Jessica Potter		Done	
Installation Type		Security System			
New-3 Phase Pre-Trim-Final		1282.1-1.100			
Hourly Labor Rates					
<u>Labor Category</u>	<u>Cost</u>	<u>Sell</u>	<u>Degree of Difficulty</u>		
Installation	30.00	60.00	1 - Prewire	0%	
Programming	40.00	80.00	2 - Trim	0%	
Training	50.00	100.00	3 - Final	0%	
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	0:00	
Labor Time by Phase (hrs:min:sec)					
Labor Category	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total	
1 - Installation	1:00:00	1:00:00	9:20:00	11:20:00	
2 - Programming			2:00:00	2:00:00	
3 - Training			3:10:00	3:10:00	
4 - Parts Labor		0:30:00	1:00:00	1:30:00	
5 - Wire Labor - Bulk	12:30:00		0:10:00	12:40:00	
6 - Wire Labor - Precut			1:20:00	1:20:00	
Total (hrs:min:sec)	13:30:00	1:30:00	17:00:00	32:00:00	
Labor Amount by Phase					
Labor Category	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total	GP%
1 - Installation	\$60.00	\$60.00	\$560.00	\$680.00	50.0%
2 - Programming			\$160.00	\$160.00	50.0%
3 - Training			\$316.67	\$316.67	50.0%
4 - Parts Labor		\$25.00	\$50.00	\$75.00	40.0%
5 - Wire Labor - Bulk	\$750.00		\$10.00	\$760.00	41.7%
6 - Wire Labor - Precut			\$80.00	\$80.00	33.3%
Total Amount	810.00	85.00	1,176.67	\$2,071.67	

Enhancement – Proposal/Pure Labor Supplements/Labor Notes

When you add Labor Notes to Pure Labor Supplements (Labor not tied to a product), you can edit them from both Labor Supplement screens. The Labor Notes also appear on the Labor Detail report and the Master Proposals which show Labor under each Product.

Add Pure Labor Supplement - Type & Time

Hayes Callahan
Triple A
Home Entertainment System
1294.1-1.51


Done

Atrium
Automation


Select a Labor Type and enter Labor Time
Only User Labor Types (1,2,3) that aren't used can be added

Labor Type	Labor Rate	Labor Time			Total (h:m:s)
		Phase 1 Prewire (h:m:s)	Phase 2 Trim (h:m:s)	Phase 3 Final (h:m:s)	
2 - Programming	\$80.00			02:00:00	2:00:00


Labor Note Labor note description that is displayed on Proposal reports
Please stay within field border



 Add Labor

Pure Supplement Labor in
Attic : Audio Discipline

Labor Type	Labor Note	Hrly Rate	Phase 1	Phase 2	Phase 3	Total (h:m:s)	Delete
Installation	L	\$60.00		00:08:00		= 0:08:00	

Total 0:08:00
\$8.00

Clear All Supplements Option Flags
Ext Sell  \$8.00

Shop Labor Notes: Expand Window  

Labor Note 4

Append Shop Labor Notes

Labor Note 4

OK

All Supps Delete All Labor **Proposal - Labor Supplements** Phantom Supplement = ☐ Print ? Home

Hayes Callahan
 Triple A
 Home Entertainment System
 1294.1-1.51

Degree of Difficulty
 1 - Prewire 0%
 2 - Trim 0%
 3 - Final 0%

Done Labor Summary

All Areas Labor assigned to Labor Supplements Labor Total: 6:18:00 \$465.50

Zone - Area	Qty	Make : Model	Labor Note	View Edit Labor Type Sort	Install Phases	Tax A B	Hourly Rate	Total Time with DOD (h:m:s)	Ext Sell
Atrium	1	Supplemental : Items : Audio	L	Q Installation	2	T T	\$60.00	2:30:00	\$150.00
Atrium	1	Supplemental : Items : Audio	L	Q Training	3	T T	\$100.00	1:15:00	\$125.00
Atrium	1	Supplemental : Items : Audio	L	Q Parts Labor	1	T T	\$50.00	0:15:00	\$12.50
Atrium	1	Supplemental : Items : Automation	L	Q Installation	3	T T	\$60.00	0:10:00	\$10.00
Atrium	1	Supplemental : Items : Automation	L	Q Programming	3	T T	\$80.00	2:00:00	\$160.00
Attic	1	Supplemental : Items : Audio	L	Q Installation	2	T T	\$60.00	0:08:00	\$8.00

Shop Labor Notes: Expand Window
 Labor note description that is displayed on Proposal reports
 Append Shop Labor Notes
 Labor note description that is displayed on Proposal reports
 OK

Home Entertainment System
 for Hayes Callahan Triple A



Labor Detail

Discipline Labor Type	Qty	Make - Model	Area Labor Notes	Install Phases	Install h:m:s	Hourly Rate	Sell Ext
Installation Audio	1	Supplemental : Items	Atrium Labor Note 2	2	2:30:00	\$60.00	\$150.00
Installation Automation	1	Supplemental : Items	Atrium Labor Note 1	3	0:10:00	\$60.00	\$10.00
Installation Audio	1	Supplemental : Items	Attic Labor Note 4	2	0:08:00	\$60.00	\$8.00
Training Audio	1	Supplemental : Items	Atrium Labor Note 3	3	1:15:00	\$100.00	\$125.00
Parts Labor Audio	1	Supplemental : Items	Atrium	1	0:15:00	\$50.00	\$12.50
Labor Time (h:m:s)					4:18:00	Total	\$305.50

Zone - Area	Master Proposal by Area		
Discipline			
Make - Model - Description			
Labor Part Wire	Qty	Unit Price	Ext Price

Atrium			
Audio			
Installation	2:30 (h:m)	\$60.00	\$150.00
Labor Note 2			
Training	1:15 (h:m)	\$100.00	\$125.00
Labor Note 3			
Parts Labor	0:15 (h:m)	\$50.00	\$12.50
Linn - Aktiv Modules - Stereo or twin mono Aktive	1 ea	\$255.00	\$255.00
Automation			
Installation	0:10 (h:m)	\$60.00	\$10.00
Labor Note 1			

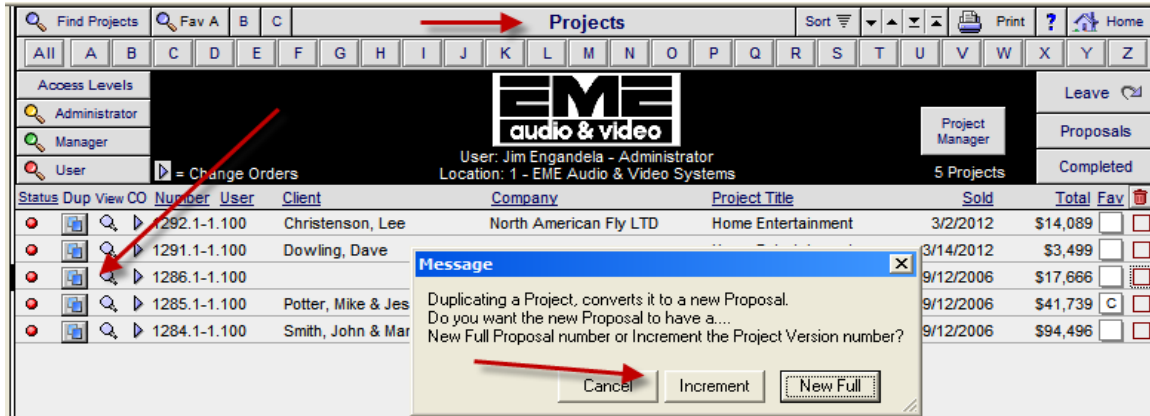
Attic			
Audio			
Installation	0:08 (h:m)	\$60.00	\$8.00
Labor Note 4			

Zone - Area	Master Proposal by Phase		
Discipline			
Make - Model - Description			
Labor Part Wire	Qty	Unit Price	Ext Price

Installation Phase: 1			
Atrium			
Audio			
Linn - Aktiv Modules - Stereo or twin mono Aktive	1 ea	\$255.00	\$255.00
Installation Phase: 3			
Atrium			
Audio			
Installation	2:30 (h:m)	\$60.00	\$150.00
Labor Note 2			
Training	1:15 (h:m)	\$100.00	\$125.00
Labor Note 3			
Parts Labor	0:15 (h:m)	\$50.00	\$12.50
Automation			
Installation	0:10 (h:m)	\$60.00	\$10.00
Labor Note 1			
Attic			
Audio			
Installation	0:08 (h:m)	\$60.00	\$8.00
Labor Note 4			

Enhancement – Project: Duplicate Project with New Proposal or Incremental number option

When Duplicating a Project you now have the option to assign a New Full Proposal number or an Incremental Project number to the new Proposal. Also the new Proposal is assigned a Status State of “P” for Proposal instead of retaining the Project “J”, which enables the Payment schedule to be modified and the payment amounts updated. Also all Change Order flags on products can be removed during the conversion to Proposal process using a Proposal/Utility.



Enhancement – Project/Products: CO Status

The CO Status field has been expanded to show double digits and the CO Status label now sorts the screen by CO number. The Zone – Area and Discipline Sorts now sort by Change Order. The Zone-Area and Discipline Finds now perform much faster on larger projects.

Super View		Area Sum		Prod Sum		All Supp		Master Project - Products View					Client Mode								Home				
Areas		Products		Text		Show All		Mike & Jessica Potter					Install Location Notes		Done		Product Total \$23,299.95								
Labor		Parts		Wire		Tasks		= Phantom		Home Theater System 1285.1-1.100															
View		Co Status		Zone - Area		Discipline		Phase		Exclude from Total		Make Category Type		Model Description		Updated Sell Price		Product Labor Parts Labor Wire Labor		Unit List Unit Cost		Adjusted Sell Unit Sell GP%		Extended Sell Ext Installed Discount	
Q		1 ea		1 - Home Theater		Linn		5101 Personal Handset		148.33		390.00		390.00		390.00		390.00		390.00		390.00		390.00	
		1285.1		3		Automation		Handheld Remote Control		9/28/2011		750.00		234.00		390.00		40.0%		538.33					
Q		1 ea		1 - Home Theater		Linn		5125		80.00		2,750.00		2,750.00		2,750.00		2,750.00		2,750.00		2,750.00		2,750.00	
		1285.1		3		Audio		Amplifier		9/28/2011		480.00		1,650.00		2,750.00		40.0%		2,830.00					
Q		1 ea		1 - Home Theater		Linn		Melodik		130.00		4,950.00		4,950.00		4,950.00		4,950.00		4,950.00		4,950.00		4,950.00	
		1285.1		3		Audio		Speaker		9/28/2011		318.75		2,970.00		4,950.00		40.0%		5,080.00					
Q		5 pr		1 - Home Theater		Linn		Katan		287.50		995.00		995.00		995.00		995.00		995.00		995.00		995.00	
		1285.1		3		Audio		Bookshelf		9/28/2011		205.50		597.00		995.00		40.0%		5,262.50					
Q		1 ea		1 - Home Theater		Linn		Knekt RCU		205.00		750.00		750.00		750.00		750.00		750.00		750.00		750.00	
		1285.1		2		Automation		Control		9/28/2011		245.00		450.00		750.00		40.0%		955.00					
Q		1 ea		1 - Home Theater		Runco		CL-610		110.00		7,995.00		7,995.00		7,995.00		7,995.00		7,995.00		7,995.00		7,995.00	
		1285.1		3		Video		Display		9/28/2011		99.95		4,797.00		7,995.00		40.0%		8,105.00					
Q		1 ea		1 - Home Theater		Sony		DVP-NS999ES		35.00		1,099.95		1,099.95		1,099.95		1,099.95		1,099.95		1,099.95		1,099.95	
		1285.1		3		Video		DVD Player		9/28/2011		120.00		620.40		1,099.95		43.6%		-100.00					
Q		1 ea		Atrium		Linn		5101 Personal Handset		862.50		390.00		390.00		390.00		390.00		390.00		390.00		390.00	
		1285.1c1 A		3		Audio		Multi-room		9/28/2011		1,312.50		234.00		390.00		40.0%		1,252.50					

Enhancement – Proposal/Project/Print Menu/Shop Menu: Staging Reports Print All & 0 Qty

You can now Print All Staging Documents (Products, Parts & Wires), Sorted by Make-Model or Zone-Area or Discipline. Items with a Zero (0) Quantity will not show up on these reports.

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

Printer Name: JE Laser, winspool, Ne03: | **Mike & Jessica Potter** | Wire Manager | **Done**

Security System
1282.1-1.100

Proposals | **Shop** | **Custom**

Job Costing

Project Pricing

Master Project Pricing

Payment Terms

Payments & Balances Summary

Subtotal Costing

Subtotals by Discipline

Grand Totals by Discipline

Subtotals by Area

Grand Totals by Area

Subtotals by Phase

Grand Totals by Phase

Areas & Products Costing

Areas & Products Summary with prices

Areas & Products Summary no prices

Areas & Products Summary no prices, with Text

Product Costing

Product Line List Summary with prices

Product Line List Line Items with prices

Product Summary by Phase Products/Supps/Labor with Subtotals and Grand Totals

Product Summary by Discipline with Subtotals and Grand Totals

Installation Utilities

Select Phases
☒ 1 Prewire
☒ 2 Trim
☒ 3 Final

Staging by Make-Model (Total Qty)

Product Staging

Part Staging

Wire Staging

Staging by Zone-Area (Total Qty)

Product Staging

Part Staging

Wire Staging

Staging by Discipline (Total Qty)

Product Staging

Part Staging

Wire Staging

Areas & Products Sorted by Discipline and Areas No Area Text, Product Locations

Areas & Products Sorted by Areas and Disciplines Area Text, Product Locations

Staple Up Cards

Staple Up Cards

Select Wire & Cable to show on Staple Up Cards
☐ Bulk
☐ PreCut

Check Issue Card option on Products in Library

Project Info

Client/Project Info

Project Site Directions

Project Tax Summary

Product Warranties

Product Cut Sheets

Product Specifications

Quality Control by Phase

Product Install Tasks

Master Product Delivery Form

Project Progress

Installation Items Installed vs Remaining to Install

Work Order Items Issued vs Installed

Product Serial Numbers

Purchase Order Products with serial numbers

Sales Invoice Products with serial numbers

Product Labor Sub Categories

Product Labor Sub Cats Product Labor Sub Categories sorted by Product/Category/Sub Cat

Salesman's Commissions

Enhancement – Project/Purchase Orders: Finish, Qty Ordered, Qty Backordered, GUI

The Finish on PO Products is not considered as a unique qualifier in the Sum Mode. The PO report reflects the unique Make/Model/Finish as well. Improvements have been made to the accuracy of the Qty on Order and Qty on Backorder numbers that are come from the PO Invoices. The PO screen GUI has been improved for better/easier comprehension.

Purchase Orders - All - 11 Products														
Mike & Jessica Potter														
1285.1-1.100														
Global Buy Pkg Off														
Products 15 5														
Auto Set View P.O.'s														
Sum Mode - PO Status														
Phase	Zone - Area	CO#	Qty Sold	Make : Model (click for Description)	Finish	Vendor ?	Qty Staged On Hand	To Order Qty	Enter PO Qty	Qty Ordered	Recvd to date	Back Order		
3			1 ea	Klipsch : A test product				1						
3			1 ea	Linn : 5101 Personal Handset	Black	Linn		1						
2			1 ea	Linn : 5101 Personal Handset	Maple	Linn		1						
3			2 ea	Linn : 5125	Silver	Linn		2						
3			1 ea	Linn : Adikt		Linn		1						
3			10 pr	Linn : Katan	Black	Linn		5		5	1	4		
3			3 pr	Linn : Katan	Painted	Linn		0		3	2	1		
3			2 pr	Linn : Katan	Rosewood	Linn		1		1	1	0		
2			1 ea	Linn : Knekt RCU	White	Linn		1						
3			1 ea	Linn : Melodik	Black	Linn		1						
3			1 ea	Sony : DVP-NS999ES	Black	Sony		1						

Enhancement – Project: PO's, WO, SI's: Moved Qty Sold and add pop up Description

All Products, Parts and Wire screens in Project PO's, WO's and SI's have been changed by moving the Sold Qty to the left of the Product Make and Model. Clicking on the Make : Model pops up a box with the Product Description. The Change Order Status has also been moved. This makes these screens more readable.

Purchase Orders - All - 23 Products														
Mike & Jessica Potter														
1285.1-1.100														
Global Buy Pkg Off														
Products 22 8 1,889														
Auto Set View P.O.'s														
PO's to Date														
Phase	Zone - Area	CO#	Qty Sold	Make : Model (click for Description)	Finish	Vendor ?	Qty Staged On Hand	Remaining to Order	Qty to Order	On Order	Recvd to date	Still on Order		
2	Atrium	C c1	1 ea	Linn : 5101 Personal Handset	Black	Linn		1						
2	Atrium	D c6	-1 ea	Linn : 5101 Personal Handset	Black	Linn		-1						
2	Atrium	A c5	1 ea	Linn : 5101 Personal Handset	Black	Linn		1						
3	Atrium	C c8	2 pr	Linn : Katan		Linn								
3	Atrium	A c10	2 pr	Linn : Katan		Linn								
3	1 - Home Theater	A c10	1 ea	Klipsch : A test product										
3	1 - Home Theater	C	1 ea	Linn : 5125		Linn								
3	1 - Home Theater	A c5	1 ea	Linn : 5125		Linn								

Make Model Description

Linn : 5101 Personal Handset

Universal learning remote

OK

Enhancement – Project/Purchase Orders/PO Utilities: Print Staging Reports from PO screen

You can now print/preview all of the Staging Reports directly from the Project/Purchase Order screen.

All Phases				Phase 1			2			3			Purchase Orders - All - 7 Products										PO	WO	SI					?	Home
PO Utility				Mike & Jessica Potter										Qty Remaining to Order			Still on Order			Create PO			Leave								
				1285.1-1.100										Products 18			2			Auto Set			View P.O.'s								
														Parts 8						Qty to Order											
														Wire 1,513																	
				Global Buy Pkg Off																											
PO Products		PO Parts		PO Wire		Sum		Proj																							
Phase	Zone - Area		Make : Model		Finish		Vendor ?		Qty Sold		Qty Staged On Hand		Remaining to Order		Qty to Order		PO's to Date														
			CO#		PO Description		Updated—Master Cost		Project Cost		Avg PO Cost						On Order		Recvd to date		Still on Order										
	3		Linn : 5101 Personal Handset		Black		Linn		2 ea				2																		
			Universal		9/28/2011		\$234.00		\$234.00				1																		
3	Linn : 5125		Silver		Linn		2 ea						1				1		1		1										
			Five channel		9/28/2011		\$1,650.00		\$1,650.00		\$1,650.00		4																		

Project - PO Utilities				?	Home
Mike & Jessica Potter					
Home Theater System					
1285.1-1.100					
Print Staging Reports					
Select Phases <input checked="" type="checkbox"/> 1 Prewire <input checked="" type="checkbox"/> 2 Trim <input checked="" type="checkbox"/> 3 Final		Staging by Make-Model (Total Qty) <input type="button" value="Print All"/> <div> <input type="button" value="Product Staging"/> <input type="button" value="Part Staging"/> <input type="button" value="Wire Staging"/> </div>		Staging by Zone-Area (Total Qty) <input type="button" value="Print All"/> <div> <input type="button" value="Product Staging"/> <input type="button" value="Part Staging"/> <input type="button" value="Wire Staging"/> </div>	
		Staging by Discipline (Total Qty) <input type="button" value="Print All"/> <div> <input type="button" value="Product Staging"/> <input type="button" value="Part Staging"/> <input type="button" value="Wire Staging"/> </div>			

Enhancement – Pending & Final Change Orders: Printing Sort Order

Pending or Final Change Orders now print so that Like Kind items are grouped together with the positive qty item first and then the negative qty item. This helps clients clearly see the additions and deletions.

Pending Change Order

1284.1c1-1.100

EME

audio & video

Home Entertainment System

Change Order

for

John & Mary Smith

Date

3/18/2012

	Qty	Ext. Price
<u>Zone 2 - Living Room</u>		
Audio		
Klipsch : A test product	1 ea	\$100.00
Linn : Akito : Pick up tonearm : Black	1 ea	\$1,100.00
Klipsch : RS-7 : Reference Surround Speaker : Matte Black	-1 ea	\$450.00
Klipsch : RSW-10 : Reference Subwoofer : Black Ash	1 ea	\$1,000.00
Klipsch : RSW-10 : Reference Subwoofer : Black Ash	-1 ea	-\$1,000.00
Linn : Melodik : Active isobarik bass extension loudspeaker : Black	2 ea	\$9,900.00
Equipment		
Klipsch : aaaaa	1 ea	\$100.00
Equipment		\$10,750.00
Installation		\$330.00
Misc. Parts		\$3,070.00
Wire & Cable		\$552.00
ZONE 2 - LIVING ROOM		\$14,702.00

Enhancement – Pending & Final Change Orders: Go to Current CO's option

When you are in a Pending or Final Change Order you can now go directly to the Current Change Orders screen when you click on the Change Order button.

Final Change Order - Detail by Area

Client: Mike & Jessica Potter

Project: Home Entertainment System 1285.1c9-1.100

Discipline: Category: Type CO Status Make: Model Description Area Totals

Home Entertainment System Change Order 1285.1c9-1.100

Zone 1 - Home Theater 6,363.50

Audio: Source: Phono C c9 1 ea Linn: Adit 350.00

Audio: Speaker: Bookshelf A c9 2 pr Linn: Katz 1,990.00

Message

New Change Orders are created from the Master Project.
Click Cancel and then the Leave button to go to the Master Project.
Click on Current CO's to view all Change Orders for this Project.

Current CO's Cancel

Enhancement – Project/Change Orders: Always use Default Change Order Payment Plan

When adding a new Change Order you can now suppress the pop up option to choose the Default Change Order Payment plan or use the Master Project Payment plan. This setting is in the Master Preferences/Other/Project 2 screen.

Master Prefs - Other - Projects 2

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

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

Change Order Preferences

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

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

☐ Always Add Fees to a new Change Order and suppress user pop up option.

☒ Always use CO Default Payment plan to a new Change Order and suppress user pop up option.

Master Project - Areas & Products

Christenson
North American Fly LTD
Home Entertainment System
1292.1-1.100

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 Make: Model Unit Sell

0 Atrium

Message

Do you want the CO to use the "Master Project" Payments or the "CO Default" Payments?

Master Proj CO Defaults

Enhancement – Master Project & Final Change Order/Payments: Include Payment Subtotals

The subtotal of the Payment 1, 2 and 3 are now shown on the Payment Summary screen and reports as well as included in the Master Project Grand Totals.

Admin Utility	Master Project - Payment Summary					Print
Mike & Jessica Potter						
Done						
Installation Type		Home Theater System				View All
New-3 Phase Pre-Trim-Final		1285.1-1.100				Change Orders
Payment Terms						
Payment Method Percentage Payment Description	Deposit Deposit Due when the proposal is accepted and signed.	Step 1 Payment Payment 1 Due 10 days before the installation prewire phase.	Step 2 Payment Payment 2 Due 10 days before the installation trim phase.	Step 3 Payment Payment 3 Due 10 days before the installation final phase.	Holdback Hold Back Due at the completion of the installation.	Totals
Original Project						
Project Payments	\$3,064.67	\$9,194.00	\$6,129.34	\$9,194.00	\$3,064.67	\$30,646.68
Pymt Date Due	4/15/2011	4/15/2011	5/15/2011	6/14/2011	6/14/2011	
Add Payment Invoice	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Pymt Amt	Invoice Total Pymt Amt
Date Invoiced						
1 Payment Amt Made	\$1.00	\$1.00	\$2.00	\$3.00	\$4.00	\$11.00
Pymt Made Dates						
Pymt Notes						
2 Payment Amt Made	\$2.00			\$3.00		\$5.00
Pymt Made Dates						
Pymt Notes						
3 Payment Amt Made	\$3.00					\$3.00
Pymt Made Dates						
Pymt Notes						
- Total Payments	\$6.00	\$1.00	\$2.00	\$6.00	\$4.00	\$19.00
Balance Due	\$3,058.67	\$9,193.00	\$6,127.34	\$9,188.00	\$3,060.67	\$30,627.68
All Final Change Orders						
CO Totals	\$0.00	-\$3,264.18	\$0.00	\$0.00	\$0.00	-\$3,264.18
- Payments Made						
Balance Due	\$0.00	-\$3,264.18	\$0.00	\$0.00	\$0.00	-\$3,264.18
Master Project Includes Original Project & All CO's						
Master Proj Totals	\$3,064.67	\$5,929.82	\$6,129.34	\$9,194.00	\$3,064.67	\$27,382.49
- Payments Made	\$6.00	\$1.00	\$2.00	\$6.00	\$4.00	\$19.00
Total Balance Due	\$3,058.67	\$5,928.82	\$6,127.34	\$9,188.00	\$3,060.67	\$27,363.49

Enhancement – Product Library/Add New Product: Exit without MakeModel deletes record

When you add a new Product in the Product library you must enter a Make and Model number or Exit the Product Library. If you choose Exit the blank product record is now automatically deleted, to not build up blank records in your Product Library.

Product Library - Product Detail

Equipment: :

Product Created: 3/14/2012

Sell Price Updated:

Cost Price Updated:

Product Specs Pkx PDF Labor Parts Wire Tasks

Make

Model

SKU

Finish

Description

Features

Group

Product Classification

Install Phase

Phantom Product?

Do not Hide

Do not Delete

Message

Both Make and Model must have values.

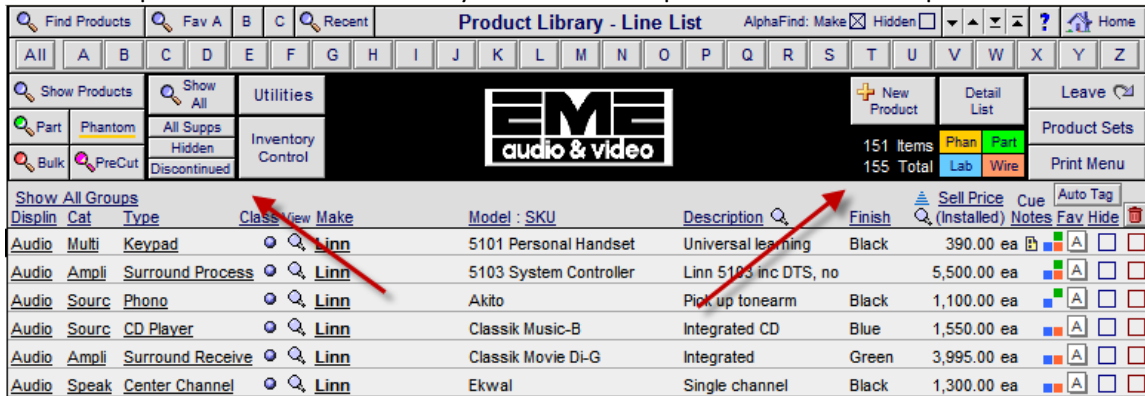
Click Enter to add a Make & Model to this Product.

Exit

Enter

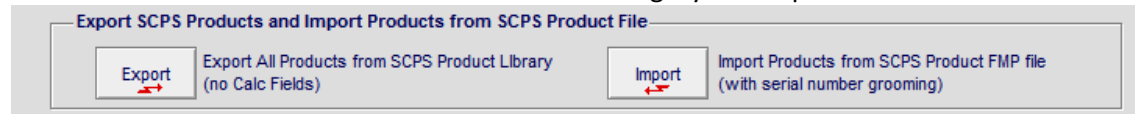
Enhancement – Product Library/Line List: New header button layout

The button placement in the header layout has been improved for better comprehension.



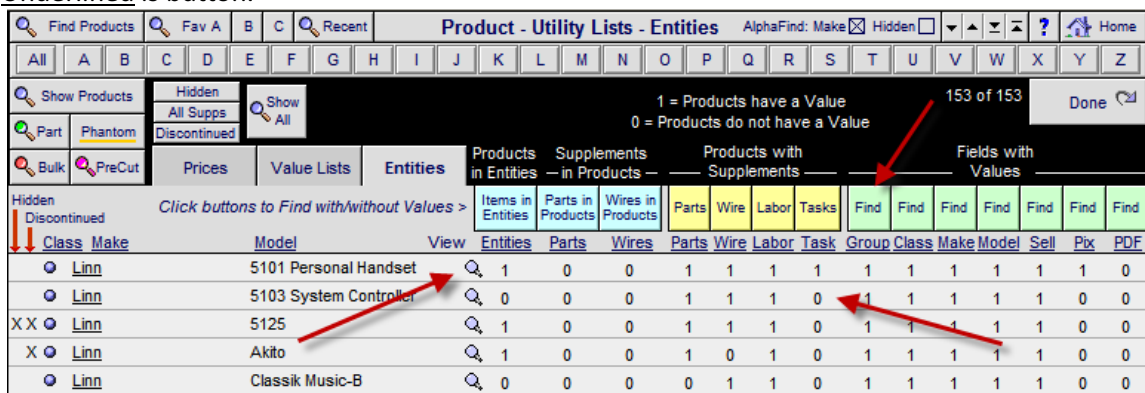
Enhancement – Product Library/Utility/General Import: Export Products and Import Products

The process of Exporting all of the Products and then re-Importing them can clean up damaged Product records. These routines maintain the data integrity of this process.



Enhancement – Product Library/Other Lists/Values: Redesigned Items with/without Values

The Values screen has been redesigned to enable you easily find Products that have or do not have Values (such as Sell Price, Labor, Supplements etc) assigned to the. Items with Values show 1. Items without Values show 0. Click on the Find buttons to Find with or without Values. Click on the View button to View the Item Details to populate them. Remember any text that is Underlined is button.



Enhancement – Product Library/Product Detail/Specs/Entities: Show All Related Entities

In the Product Library/Detail/Specs screen there is a button the Show all Entities that a Product, Part or Wire is attached to. Products will show all of the Proposals and Projects, Parts show all of the Products they are attached to as a Part Supplement. Wire shows all of the Product they are attached to as a Wire Supplement.

Product Library - Specifications 5 of 153 ? Home

Replace Data

Entities using this Product

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

Done Return to List Prev Next

Product Specs Ptx PDF Labor Parts Wire Tasks

Data
Product ID: 2637
Product Created By: James Engandela
Sell Price Updated By: Jim Engandela
Cost Price Updated By: Jim Engandela

Warranty
Factory Warranty 1 year Parts - 90 days Labor
Extended Warranty

Product Library - Products Entities 5 of 153 ? Home

Linn
5101 Personal Handset
Audio : Multi-room : Keypad

Done Prev Next

Entity Types
Proposals
Projects and Final Change Orders
Completed
Archives

Entities this "Product" is attached to

Entity Type	Entity ID
Proposal	1279.1-1.100
Proposal	1282.1-1.100
Proposal	1282.1-1.100
Project	1284.1-1.100
Project	1285.1-1.100
Project	1285.1-1.100

Product Library - Parts in Entities 11 of 20 ? Home

Linn
Knekt RCU Install Kit
Audio : Misc : Final Part

Done Prev Next

Products this "Part Supplement" is attached to

Group Assigned Supplement	Manually Assigned Supplement
Linn : 5101 Personal Handset : Black	Linn 5103 System Controller
Linn : 5125 : Silver	
Linn : Basik 3 : Black	
Linn : Basik 3 IR : Black	
Linn : Basik 3 IR-S : Silver	
Linn : Basik 3 IR-W : White	
Linn : Basik 3 S : Silver	

Product Library - Products Wires in Entities 4 of 11 ? Home

Linn
K20 Cable
Wire & Cable : Bulk Wire & Cable : Speaker Cable

Done Prev Next

Products this "Wire Supplement" is attached to

Group Assigned Supplement	Manually Assigned Supplement
Klipsch : RC-35 : Black Ash	Linn Classik Movie DI-G
Klipsch : RF-35 (6483) : Black Ash	
Klipsch : RS-7 : Matte Black	
Linn : Ekwal : Black	
Linn : Ekwal-C : Cherry	
Linn : Ekwal-M : Maple	

Enhancement – Contact/Detail: Phone Number Labels

All Phone Numbers now have user definable Labels. Also all Labels are pop up lists making it easier to select a label or type in your own label.



	Phone Numbers	Country Code
<input checked="" type="radio"/> Fav	Home Phone 715-287-4557 ext <input type="text"/>	cc <input type="text"/>
<input type="radio"/>	Work Phone 715-695-3533 ext <input type="text"/>	cc <input type="text"/>
<input type="radio"/>	Chris mobile 715-287-3987 ext <input type="text"/>	cc <input type="text"/>
<input type="radio"/>	Fred Mobile 715-872-8766 ext <input type="text"/>	cc <input type="text"/>
<input type="radio"/>	Day Phone 715-298-3876 ext <input type="text"/>	cc <input type="text"/>
<input type="radio"/>	Other Label 1 715-797-3533 Other 1	
<input type="radio"/>	Other Label 2 715-797-1238 Other 2	
<input type="radio"/>	Other Label 3 715-287-8376 Other 3	
<input checked="" type="radio"/>	Fax 1 Label 715-695-3515 Fax 1	
<input type="radio"/>	Fax 2 Label 715-287-3876 Fax 2	

Favorite Phone (H) 715-287-4557
 Favorite Email northamericanfly@triwest.net

Enhancement – Master Prefs/Tracker screens: Display User Names without Titles

Task Owners assigned to Tasks now only show their names and not their Titles.

Tracker Setup	Calendar Setup	Gantt Setup	Master Prefs - Tracker - Proposals		Print	?	Home
<div>Proposals Projects Change Orders Completed</div> <div>Done</div>							
Proposal Milestone Milestones are created Automatically in the Master Tracker from cue days, if Actual dates are not entered							
Due Date <input type="text" value="15"/> Days from Proposal creation eMail CC 							
Proposal Tasks Cue days are based on the Proposal due date							
Cue Days	Task Name	Task Type	Task Description	Task Owner			
				From Proposal	From Users (Precedence)	eMail	CC
-15	Client Profile	Discovery	Interview client & complete client profile	Sales Specialist	Jim Engandela		
-10	Walk Through	Discovery	Gather project details	Sales Specialist	Joel Roberts		
-8	Design & Engineering	Review	Review client profile with Engineering	Project Engineer			
-7	Send letter to Client	Followup	Send Post interview letter to client	Sales Specialist			
-5	Sales Review	Review	Review client profile with Sales	Project Manager			
2	Send letter to Client	Followup	Post proposal letter	Sales Specialist			

Enhancement – Master Tracker: CC Contacts icon with pop list

Task Owner that have other Users that are CC's emails now have an icon next to them and if you click on the icon you will get a list of all of the users that receive the same emailed task or milestone. The Task Detail view screens also have this new feature.

The screenshot shows the Master Tracker interface. A list of tasks is displayed with columns for Due Date, Tracker Item, Proposal Project, Item Owner, Total Labor, and Total Pymts. A red arrow points to the 'CC email Contacts' icon next to the 'Item Owner' field for the task '1315.1-1.100 Rudy & Cecilia Defiglia Home Entertainment System'. A pop-up window titled 'CC email Contacts' is shown, listing 'Jim Engandela, Sandy Engandela1' with an 'OK' button.

Due Date	Tracker Item	Proposal Project	Item Owner	Total Labor	Total Pymts
4/8/2012 Apr - Sun	Project Milestone - Payment Payment Phase 1 - Prewire - Payment	1311.1-1.100 Hayes Callahan - Triple A Home Entertainment System	Sandy Engandela1 No email	\$397.82	
4/15/2012 Apr - Sun	Proposal Task - Proposal test	1313.1-1.100 Hayes Callahan - Triple A Home Entertainment System	Jim Engandela horizon@trivest.net		
4/15/2012 Apr - Sun	Proposal Task - Proposal test	1314.1-1.100 Lee Christenson - North Home Entertainment System	Jim Engandela horizon@trivest.net		
4/15/2012 Apr - Sun	Proposal Task - Proposal test	1315.1-1.100 Rudy & Cecilia Defiglia Home Entertainment System	Jim Engandela horizon@trivest.net		
4/17/2012 Apr - Tue	CO Milestone - Install Install Hours Phase 1 - Prewire - Installation				
4/18/2012 Apr - Wed	Project Milestone - Install Install Hours Phase 1 - Prewire - Installation				
4/21/2012 Apr - Sat	Project Milestone - Payment Payment Phase 2 - Trim - Payment				

Enhancement – Master Tracker: The pop up Calendar auto defaults to today's date

The pop up Calendar now auto defaults to today's date

The screenshot shows the 'Task Date' pop-up window. It has a text field containing 'March 17, 2012' and a calendar icon to its right. Below the text field is a checkbox labeled 'Carry Forward After Due' which is currently unchecked. A red arrow points to the calendar icon.

Fix – Proposal/Project/Completed Lists: Access Level Indicator Colors

The Access Level Indicator Colors have been restored to Yellow, Green and Red.

The screenshot shows the 'Proposals' list in the Master Tracker interface. The list has columns for Status, Dup, View, Number, User, Client, Company, Proposal Title, Created, Total Fav, and a delete icon. The first three rows of the list are highlighted with yellow, green, and red background colors, respectively. A red arrow points to the first row, which is highlighted in yellow.

Status	Dup	View	Number	User	Client	Company	Proposal Title	Created	Total Fav	Icon
Yellow			1294.1-1.51	Callahan, Hayes	Triple A	Home Entertainment	3/7/2012	\$0		
Green			1282.1-1.100	Potter, Mike & Jessica		Security System	9/12/2006	\$65,437	B	
Red			1279.1-1.100	Traaseth, Ann & Bob		Home Automation	9/12/2006	\$32,807		

Fix – Proposal/Print Menu/Cover Page: Extra Text Line

The Extra Text Line (often used for Contractor License numbers) is now independent of the Salesman's Name and Title. If you choose not to show the Salesman's Name and Title on the Cover Page, the Extra Text Line will still show.

Fix – Proposal/Print Menu/Contract: Client email address

The client email address on the Proposal Contract now comes from the email address field for the Favorite Contact for this Client.

Home Entertainment System
for Jim Engandela

EME
audio & video

Jim Engandela

Home Phone: 715-287-3335

Mobile: 715-287-3335

email: horizon@trivest.net

System Contract

Description

The attached equipment quotes, installation estimates and project descriptions are to be referred to as the proposal. All equipment, labor and materials quoted are valid for 30 days after receipt of proposal. Any changes or modifications to this proposal can only be made by EME Audio & Video.

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

Jim Engandela

Duplicate Contact | Delete Contact | New Contact

Details | Info | Com Log | Entities | Files & Pix | Transactions

New Proposal | New POS | New Task

Done | Prev | Next | 6 of 14

Category: Employee | Class: | Key: | ID: | Fav: ☐ | Tag: ☐

Create Vendor and Assign Product Matrix | Group: | Status: | Staff: | Tickler: |

Fav Contact	Print Contact	Title	First Name	Last Name	Info - Title	email Address	Web
<input checked="" type="radio"/>	<input checked="" type="radio"/>		Jim	Engandela	President	horizon@trivest.net	
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						
<input type="radio"/>	<input type="radio"/>						

The display of the Change Order status overlapping the Product Model number has been fixed.

rniture : Rack System : Shelves, PlatesC	1 ea	Middle Atlantic : HBL3	3SP FLAT ANOD.ALUM.BLANK
rniture : Rack System : Shelves, PlatesA c1	1 ea	Middle Atlantic : HBL1	1SP FLAT ANOD.ALUM.BLANK
rniture : Rack System : Shelves, PlatesA c1	1 ea	Middle Atlantic : HBL2	2SP FLAT ANOD.ALUM.BLANK
rniture : Rack System : Shelves, PlatesD c2	-1 ea	Middle Atlantic : HBL3	3SP FLAT ANOD.ALUM.BLANK
rniture : Rack System : Shelves, PlatesA c2	1 ea	Middle Atlantic : HBL2	2SP FLAT ANOD.ALUM.BLANK
rniture : Rack System : Accessory C	1 ea	Middle Atlantic : LBP-1A	L-Shaped Lacing Bar, 10 Pieces

Fix – Project PO, WO, SI: Select All Phases, Phase 1, Phase 2, Phase 3

Clicking on the All Phases, Phase 1,2,3 button now properly find the Items instead of popping up an error message in the Purchase Order, Work Order and Sales Invoice screens.

All Phases		Phase 1		2	3	Purchase Orders - All - 23 Products					PO	WO	SI	?		Home	
PO Utility		John & Mary Smith					Qty Remaining to Order		Still on Order	Create PO		Leave					
		1284.1-1.100					Products 27		6								
							Parts 17			Auto Set		View					
PO Products		PO Parts		PO Wire		Sum		Proj		Global Buy Pkg Off		Wire 2,734		Qty to Order		P.O.'s	
Phase	Make : Model		Finish		Vendor ?		Qty Sold		Qty Staged	Remaining to	Qty to	PO's to Date					
	Zone - Area		CO# PO Description		Updated—Master Cost		Project Cost		Avg PO Cost	On Hand	Order	Order	On Order		Recvd to date	Still on Order	
	3		Klipsch : RC-35		Black Ash				1 ea		1						
			Center Channel		9/26/2011 \$210.00		\$210.00			-2							
	3		Klipsch : RF-35		Black Ash				2 ea		2						
			Reference		9/26/2011 \$282.50		\$282.50			-4							

Fix – Completed Project: Completed Date

If no Completion date is entered in the Project then the date that the Project was converted into a Completed Project will be the date showing in the Completed Project list.

Install Phase Dates

Start Dates

1 - Prewire 10/12/2006

2 - Trim 11/11/2006

3 - Final 12/11/2006

Completion Date

Update all Completed Tasks

Completed Date

If empty the Completed Date is the Project to Completed Project Conversion Date

Fix – POS: Unique Invoice Numbers

When creating and duplicating POS Quotations, Invoices, Work Orders etc. The POS module now always takes the highest current number and adds 1. This insures that duplicate invoice numbers will not be created.

Fix – POS: Creating a new POS invoice always displays the invoice that was just created

Under some conditions when creating a new POS invoice you were brought to a different invoice and then would have to find the actual new invoice. This has been corrected.



SECURITY SYSTEM

Version 1

Designed and Prepared for

Mike & Jessica Potter
567 58TH Street
Oakland, CA 94607

PA Home Contractors license

Jim Engandela
President



Product	Supplements	Installed Price
Product	Parts	Wire
\$390.00		\$750.00
		\$75.00
\$390.00		\$825.00
		Product \$390.00
		Parts
		Wire \$750.00
		+ Labor \$75.00
		Total \$1,215.00

Fix – Master Prefs/Product OverRide Labor: Remove this option

This Master Prefs/Labor option has been removed. It no longer is viable to globally use Override labor in the Product Library. Each product can be individually set to Override labor in the Product Library.

☐ Always show Labor Override, instead of Group Labor screen

Fix – Master Tracker: Change Order Calendar

The pop up for Change Order Tasks now works properly.

3/16/2012	CO Task - Project Mgmt	1291.1c2-1.100	Joel Roberts
Mar - Fri	Project Management Notice	Dave Dowling	No email
	Notify Management of start of CO	Home Entertainment System	
3/20/2012	CO Milestone - Install	1285.1c7-1.100	Jim Engandela
Mar - Tue	Install Hours	Mike & Jessica Potter	0:00
	Phase 2 - Trim - Installation	Home Entertainment System	horizon@trivest.net

Fix – Proposal/Tracker: Proposal Due Date Update

Entering a new Proposal Due Date and clicking on the Update button now properly updates all of the Proposal Task Due Dates.

New Task/Appointment

Proposal Tracker - Milestones & Tasks

Date Created: 3/17/2012

?

Home

Add all Default Tasks & Appointments for this Proposal

Delete all Tasks & Appointments for this Proposal

Hayes Callahan

Triple A

1302.1-1.100

Done

Due Dates are based on the Proposal Due Date

Proposal Due Date

7/1/2012

Update

Proposal Milestones & Tasks

Hide	Done	Done Date	Due Date	WBS	Task Type	Task Name	Task Description	Item Owner
<input type="checkbox"/>	<input type="checkbox"/>		6/16/2012		Task - Discovery	Client Profile	Interview client & complete	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		6/21/2012		Task - Discovery	Walk Through	Gather project details	Joel Roberts
<input type="checkbox"/>	<input type="checkbox"/>		6/23/2012		Task - Review	Design & Engineering	Review client profile with	Jon Osterx
<input type="checkbox"/>	<input type="checkbox"/>		6/24/2012		Task - Followup	Send letter to Client	Send Post interview letter to	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		6/26/2012		Task - Review	Sales Review	Review client profile with	Joel Roberts
<input type="checkbox"/>	<input type="checkbox"/>		7/1/2012		Milestone - Proposal	Proposal Due	Present proposal to client	Jim Enqandela
<input type="checkbox"/>	<input type="checkbox"/>		7/3/2012		Task - Followup	Send letter to Client	Post proposal letter	Jim Enqandela

SCPS Version 9.1v3
Released: 2/13/2012

Enhancement – Master Prefs/Labor/Labor Rates: Done button Auto update Product Library

When you leave the Master Prefs/Labor Rates screen a routine automatically updates all of the Labor Supplements (Parts & Wire) in the Product library with the Labor Time, so if you changed any of them the new labor time will be reflected on the supplements in the Product Library. Any Labor on the supplements in the Product Library that you have manually entered (Override Labor) will not be affected.

Master Prefs - Labor Rates										
Rate Structures										Done
Labor Categories	Default Hourly Rates 1		Hourly Rates 2		Hourly Rates 3		Hourly Rates 4		Hourly Rates 5	
	Basic Rate		Inner City Rate		Prewire only					
	Sell	Cost	Sell	Cost	Sell	Cost	Sell	Cost	Sell	Cost
1 - Installation	60.00	30.00	80.00	40.00	30.00	15.00				
2 - Programming	80.00	40.00	100.00	50.00	30.00	15.00				
3 - Training	100.00	50.00	120.00	60.00	25.00	15.00				
4 - Parts Labor	75.00	30.00	60.00	30.00	25.00	15.00				
5 - Wire Labor - Bulk	60.00	35.00	70.00	35.00	25.00	15.00				
6 - Wire Labor - Precut	60.00	40.00	70.00	35.00	25.00	15.00				

Default Labor Time	
Labor Categories	Labor Time (hrs:min:sec)
4 - Parts Labor	0:15:00 Parts per Each
5 - Wire Labor - Bulk	0:30:00 Bulk per Foot
6 - Wire Labor - Precut	0:45:00 Precut per Pair

Enhancement – Proposals/Print Menu/User Print Cue: Triad Proposals

A User Print Cue for Triad has been created that prints the Cover Page, Area & Products, Product Summary and Contract proposal sections.

Printer Setup		PDF Creator		Proposal - Print Menu		Home	
Printer Name: JE Laser,winspool,Ne03:		Rudy & Cecila Defiglia		Send Email		Done	
		Home Entertainment System 1292.1-1.100		<input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer		Preferences	
Proposals		Shop		Custom		Print Options	
Main Proposal Print All Sections User Print Cue Triad-Proposal Proposal Sections Cover Page Client Intro		Proposal Summaries Print All Proposal Summary Discipline Area Phase		Master Proposal & Supplements Products, Parts, Wire & Labor Discipline Area Products & Only Labor Products & Supplements without Prices Phase			

Enhancement – Product Library/Product Detail/Supplement Labor: Display Default Labor

The Default Labor Time for the Part or Wire Supplement is now displayed on the Supplement so that you can see the difference between it and the manually entered Override Labor. The Edit Group Labor now works only for Products and not for Supplements as it should.

Product Library - Supplemental Installation Labor 1 of 41 ? Home

Linn
Aktiv Modules
Stereo or twin mono Active crossover upgrade (treble, mid, bass)
Audio : Misc : Final Part

Done Return to List
Prev Next

Product Specs Ptx PDF Labor Parts Wire Tasks

Part Supplemental Labor
Audio : Misc : Final Part
Primary Install Phase: 1 Prewire

Labor Type	Hourly Labor Rate	Override Labor Time (minutes.seconds) Primary Install Phase: 1 Prewire
4 - Parts Labor	\$75.00	0:01:00 min.sec per each

Master Prefs Default Unit Labor 0:15:00

Phase 1 Prewire Phase 2 Trim Phase 3 Final

Total Labor Amount \$1.25

Enhancement – Product Library/Line List: Show All Supplements

You can now find all of the Parts, Bulk Wire and PreCut Wire Supplements and they will be sorted in that order.

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

Show Products Other List Views Product Utilities New Product Detail List Leave
Part Phantom Hidden Groom Products 41 Items 185 Total Phan Lab Wire Inventory Control Product Sets Print Menu
Bulk PreCut All Supps

Show All Groups

Displin	Cat	Type	Class View Make	Model : SKU	Description	Finish	Sell Price	Cue	Auto Tag
Audio	Misc	Final Part	Linn	Aktiv Modules	Stereo or twin mono		255.00 ea		
Audio	Source	Phono	Linn	Cirkus Kit	Main bearing upgrade		645.00 ea		
Audio	Speak	Part	Linn	Classik Brakit (3459)	Wall bracket for UNIK		40.00 pr		
Audio	Speak	Part	Linn	Classik Brakit (3550)	Single wall bracket for		40.00 ea		

Enhancement – Master Tracker/Utility: Export Tracker Tasks and Milestones

You can now export Master Tracker Milestones and Tasks and open this exported file in Excel or other databases.

Export Tracker

Export Tracker Milestones and Tasks
Please chose the Tasks you want to export first
The Exported file will be named _SCPS_TrackerExport.csv
The Exported file will reside in your SCPS folder

The Unit Labor Time for Parts and Wire Supplements now comes from the Time set on them in the Product Library and not from the default Parts and Wire Labor time from the Proposal. This Unit Labor time is now displayed on the Proposal Parts and Wire Supplements screens.



Proposal - Product Detail - Wire Supplements 1 of 2 ? Home

Rudy & Cecilia Defiglia
1292.1-1.100
Linn : Akito
Audio : Source : Phono

Areas Text Products
Labor Parts Wire Tasks

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

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

Class	Bulk Run Type	No Labor	Total Qty	Wire Make	Model	Description	Phz	Unit Labor	Unit Cost	Unit Sell	Ext Sell
Bulk	Home		150 ft	Linn	Bulk Analog interconnect	Analog	1	0:00:20	2.55	4.25	637.50
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of	1	0:03:00	72.00	120.00	120.00

Wire Ext Total: \$757.50

Wire Labor Type	Hourly Rate		Total Labor - Ext Time				Total Labor - Ext Cost				Total Labor - Ext Sell			
	Cost	Sell	Pz	Ext	DOD	Ext+DOD	Pz	Ext	DOD	Ext+DOD	Pz	Ext	DOD	Ext+DOD
Wire Labor - Bulk	\$35.00	\$60.00	1	1:45:00	10%	1:55:30	1	\$61.25	10%	\$67.38	1	\$105.00	10%	\$115.50
			2	0:00:00	10%	0:00:00	2		10%		2		10%	
Default Unit Labor			3	0:00:30	10%	0:00:00	3		10%		3		10%	
Phase 1+2+3 - Ext Total:			1:55:30				\$67.38				\$115.50			
Wire Labor - Precut	\$40.00	\$60.00	1	0:03:00	10%	0:03:18	1	\$2.00	10%	\$2.20	1	\$3.00	10%	\$3.30
			2	0:00:00	10%	0:00:00	2		10%		2		10%	
Default Unit Labor			3	0:05:00	10%	0:00:00	3		10%		3		10%	
Phase 1+2+3 - Ext Total:			0:03:18				\$2.20				\$3.30			
All Wire Labor - Phase 1+2+3 - Ext Total:			1:58:48				\$69.58				\$118.80			
Wire & Labor Ext Total:							\$876.30							

Fix – POS/Service Orders with RMA's: Print Service Order and all related RMA's

Printing the Service Order and all of its RMA's now works properly instead of only printing the Service Order.

POS - Service Order Done Archive 1 of 3 ? Home

SO #6351 View Add RMA Set Up Done

3/11/2005 Label JOB SITE: Show Hide

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

Salesman: Jim Engande
Project Manager:
Site Survey By:
Estimate By:

Master Tracker Appointment
Requested Installer
Add Edit
Appointment:
Contractor Ph:
Super Phone:
Special Phone:

Message
Print the Service Order
or
the Service Order and all of its RMA's
SO+RMA SO Cancel

Fix – Proposals/Print Menu/Custom: Triad Areas & Products with Sell + Labor Totals

This report now prints properly regardless if the Custom Layouts is checked or not.

Printer Setup **Proposal - Print Menu - Custom** Home

Printer Name: Rudy & Cecilia Defiglia
JE Laser, winspool,Ne03: Done

Home Entertainment System
1292.1-1.100

Proposals Shop **Custom**

Please contact Horizon Software if you have specific custom form needs.

Triad

- Sales Contract and Service Agreement
- Commercial Equipment Lease and Service Agreement
- Areas & Products**
with Unit Sell, Unit Labor & Extended Sell + Labor.
Area Subtotals can be turned off/on with Print Options

Fix – Proposals/Proposal Detail: Remove redundant product description

The product description was displayed twice on the Proposal Detail screen and this has now been corrected. This was not occurring on the printed proposal, only on this screen display.

Discipline		Area	Phase	Proposal - Detail by Area			Q View	Utility	?	Home
Client		Areas	Area Text	Mike & Jessica Potter Security System 1282.1-1.100			Pricing	Purchasing	Leave	
Project	Info	Products	Overviews				Tracker	Work Orders	Change Orders	
Contact	Log	Supplements	Project Fees				Payments	Invoicing	Print Menu	
Client Mode		Wire Manager	Super View				Labor Meter	Labor Total	Grand Total	
Discipline : Category : Type				Make : Model			Description			Area Totals
Security System										
Zone 1 - Basement										30,456.98
Audio : Amplifier : Multi-channel				1 ea	Linn : 5125	Five channel power amplifier (Black) :				2,750.00
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 : Black				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				7,995.00
Video : Source : DVD Player				1 ea	Sony : DVP-NS999ES	Progressive Scan DVD Player : Black				1,099.95
Automation : Remote : Handheld Remote				1 ea	Linn : 5101 Personal Handset	Universal learning remote : Black				390.00
Automation : Control : Keypad				1 ea	Linn : Knekt RCU	Knekt room control unit : White				750.00

SCPS Version 9.1v2
Released: 2/7/2012

Fix – Task Manager: Restore Gant Chart and Calendar Import Maps

Restoring the Gant Chart and Calendar Import Maps enables the Tracker Tasks to properly create Gant Charts and Calendars.

Fix – POS/Invoice: Print Justify text

The Product info section of the POS/Invoice is now left justified.

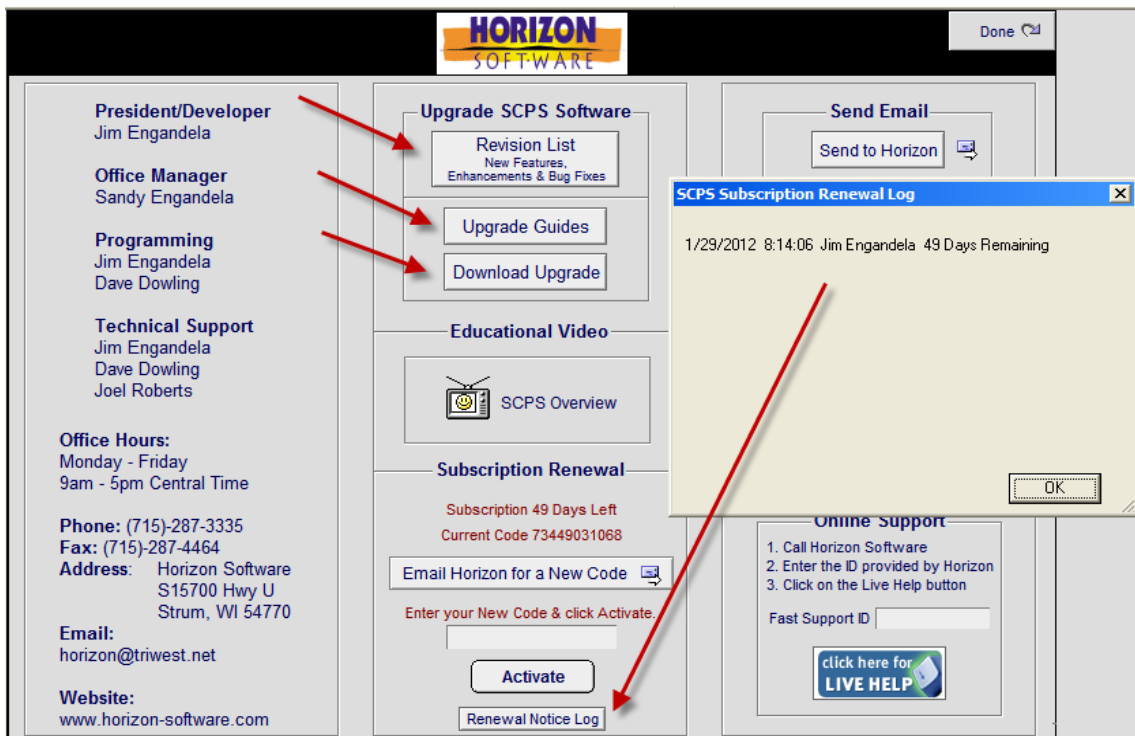
EME Audio & Video Systems 2950 Mall Drive Eau Claire, WI 54701 715-287-3335		EME audio & video		INVOICE SI #7210 1/29/2012 cecilia@christenson.com	
Cecilia Christenson Wade Realty 567 58TH Street Oakland, CA 94607		Home: 808-262-2614 Work: 808-263-3313 Fax: 808-261-1074		Address 2: Cecilia Christenson Wade Realty	
Sales Rep	Jon Osterx	Terms	Quotation prices good for 30	Ship VIA	
Date		Payment	Check Number	Ref #	
Qty	Description			Price	Total
1	ea Linn : Classik Music-B : Integrated CD player/tuner/preamp/power amplifier : Blue			1,550.00	1,550.00
2	ea Linn : 5101 Personal Handset : Universal learning remote : Black			390.00	780.00
1	ea Sony : SLV-N99 : VHS Video Cassette Recorder			199.00	199.00
500	ea Linn : 5101 Personal Handset : Universal learning remote : Black			390.00	195,000.00

SCPS Version 9.1v1
Released: 2/6/2012

Enhancement – Horizon Info screen: SCPS Renewal Notice Log & New Upgrade Guide

The Horizon Info screen can be accessed by clicking on the Horizon Logo on the Login and Main SCPS screen as well as from the Master Preferences screen. Horizon Info, Subscription Renewal, SCPS Upgrade, We Transfer and Fast Support features are now all available from this single screen.

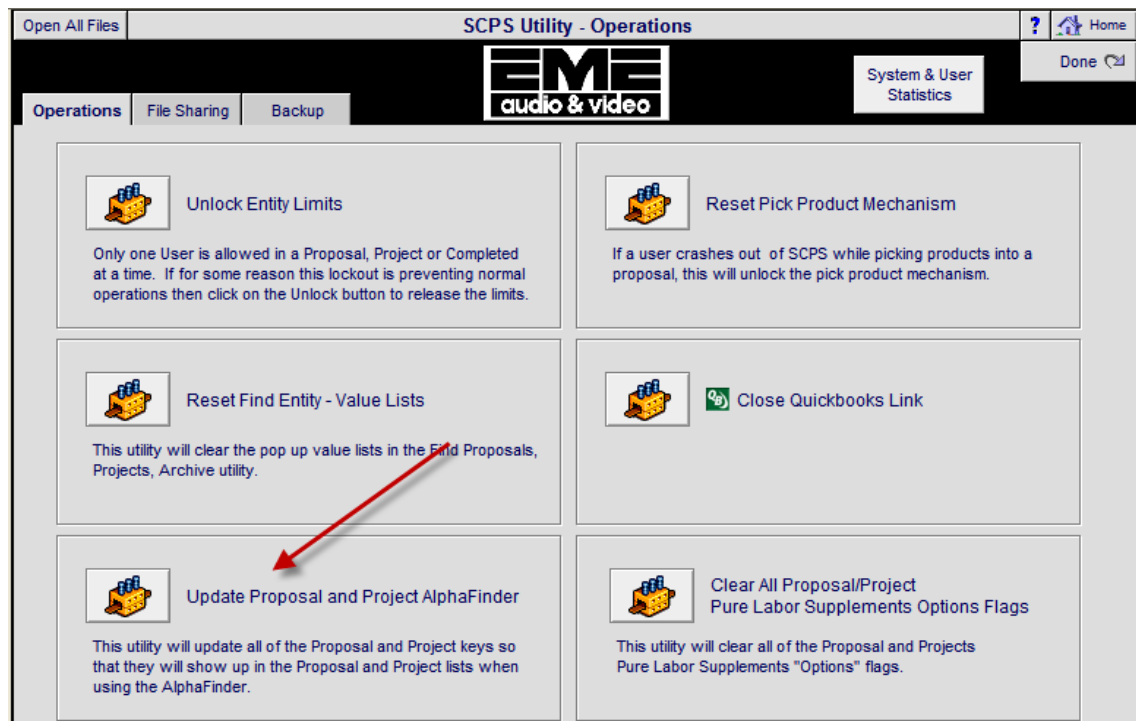
Each time users are automatically notified to Renew SCPS, a log entry is now automatically made to track who was notified. The SCPS Revision List and the Upgrade Guide and Download SCPS Upgrade button now are all enabled on this screen.



Enhancement – Proposals/Projects/Completed: AlphaFinder Utilities

In order to ensure that Proposals, Projects and Completed Project are found by Last Name and/or Company Name, when using the AlphaFinder, an updating Utility has been added to update all entities. In addition this utility has been added to the AlphaFinder so that it runs each time the AlphaFinder is used.

Find Proposals	Fav A	B	C	Proposals															Sort	Print	Home					
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Access Levels		<div>EME audio & video</div> <div>User: Jim Engandela - Administrator Location: 1 - EME Audio & Video Systems</div>															New Proposal		Leave							
Administrator																			Projects							
Manager																			Archive							
User		= Global Proposal															3 Proposals									
Status	Dup View	Number	User	Client	Company	Proposal Title	Created	Total	Fav																	
		1292.1-1.100	Callahan, Hayes	Triple A	Home Entertainment	1/24/2012	\$4,476																			
		1282.1-1.100	Potter, Mike & Jessica		Security System	9/12/2006	\$77,629																			
		1279.1-1.100	Traaseth, Ann & Bob		Home Automation	9/12/2006	\$30,375																			



Open All Files

SCPS Utility - Operations

System & User Statistics

Done

Operations | File Sharing | Backup

Unlock Entity Limits

Only one User is allowed in a Proposal, Project or Completed at a time. If for some reason this lockout is preventing normal operations then click on the Unlock button to release the limits.

Reset Pick Product Mechanism

If a user crashes out of SCPS while picking products into a proposal, this will unlock the pick product mechanism.

Reset Find Entity - Value Lists

This utility will clear the pop up value lists in the Find Proposals, Projects, Archive utility.

Close Quickbooks Link

Update Proposal and Project AlphaFinder

This utility will update all of the Proposal and Project keys so that they will show up in the Proposal and Project lists when using the AlphaFinder.

Clear All Proposal/Project Pure Labor Supplements Options Flags

This utility will clear all of the Proposal and Projects Pure Labor Supplements "Options" flags.

Enhancement – Proposal/Product Detail/Parts & Wire: Improvements

Major improvement in the management of Product Parts and Wire. Changing the Qty of a Part or Wire accurately changes the time and amount of its associated labor. Changing the Phase of a Part or Wire accurately changes the phase of its associated labor. Deleting a Part or Wire deletes its associated Labor. The total labor for all Parts and Wire is now displayed, by phase, at the bottom of each screen.

[illegible]

Delete All Wire		Restore Wire Prices		Proposal - Product Detail - Wire Supplements										1 of 1		? Home			
Areas		Text		Products		Rudy & Cecilia Defiglia 1292.1-1.100 Linn : 5101 Personal Handset Audio : Multi-room : Keypad										Degree of Difficulty 1 - Prewire 10% 2 - Trim 10% 3 - Final 10%		Proposal Detail Prev Next	
Labor		Parts		Wire		Tasks													
Product		Specs		Pfx - PDF's		Labor		Parts		Wire		Tasks		Atrium					
Wire Make				Model				Wire & Cable											
								Add Product Qty 1				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 ft	Linn	Bulk Analog interconnect	Analog interconnect	1	2.55	4.25	637.50									
Bulk	Home		150 ft	Linn	Bulk Silver Cable	Silver analogue	2	9.05	15.25	2,287.50									
Bulk	Home		150 M	Linn	K10 Cable	Loudspeaker cable	3	3.00	5.00	750.00									
Pre-Cut			1 pr	Linn	Black Interconnect	Pair of phono-phono	1	72.00	120.00	120.00									
Pre-Cut			1 ea	Linn	CAT5-40m	Terminated CAT5	2	75.00	125.00	125.00									
Pre-Cut			1 ea	Linn	CAT5-60m	Terminated CAT5	3	99.00	165.00	165.00									
											Wire Ext Total:		\$4,085.00						
Wire Labor																			
Wire Labor Type		Time Per/Ft	Hourly Rate		Total Labor - Ext Time				Total Labor - Ext Cost				Total Labor - Ext Sell						
			Cost	Sell	Pz	Ext	DOD	Ext+DOD	Pz	Ext	DOD	Ext+DOD	Pz	Ext	DOD	Ext+DOD			
Wire Labor - Bulk		0:00:30	\$35.00	\$60.00	1	1:15:00	10%	1:22:30	1	\$43.75	10%	\$48.13	1	\$75.00	10%	\$82.50			
					2	1:15:00	10%	1:22:30	2	\$43.75	10%	\$48.13	2	\$75.00	10%	\$82.50			
					3	1:15:00	10%	1:22:30	3	\$43.75	10%	\$48.13	3	\$43.75	10%	\$82.50			
Phase 1+2+3 - Ext Total:					4:07:30				\$144.38				\$247.50						
Wire Labor - Precut		0:05:00	\$40.00	\$60.00	1	0:05:00	10%	0:05:30	1	\$3.33	10%	\$3.67	1	\$5.00	10%	\$5.50			
					2	0:05:00	10%	0:05:30	2	\$3.33	10%	\$3.67	2	\$5.00	10%	\$5.50			
					3	0:05:00	10%	0:05:30	3	\$3.33	10%	\$3.67	3	\$5.00	10%	\$5.50			
Phase 1+2+3 - Ext Total:					0:16:30				\$11.00				\$16.50						
All Wire Labor - Phase 1+2+3 - Ext Total:					4:24:00				\$155.38				\$264.00						
Wire & Labor Ext Total: \$4,349.00																			

Enhancement – Proposal/Product /Pure Parts & Wire Supplements: Improvements

Major improvement in the management of Pure Parts and Wire supplements. Changing the Qty of a Part or Wire accurately changes the time and amount of its associated labor. Changing the Phase of a Part or Wire accurately changes the phase of its associated labor. Deleting a Part or Wire deletes its associated Labor.

Proposal - Pure Parts Supplements										?
<div> <div>Areas</div> <div>Text</div> <div>Products</div> </div>				<div> <div>Rudy & Cecilia Defiglia</div> <div>Home Entertainment System</div> <div>1292.1-1.100</div> </div>				<div> <div>1. Pick an Area</div> <div>2. Enter a Make & Model</div> <div>3. Click Add Part</div> <div>4. Pick Discipline to View Parts</div> </div>		<div>Done</div>
<div> <div>Labor</div> <div>Parts</div> <div>Wire</div> <div>Tasks</div> </div>				<div> <div>Pure Labor</div> <div>Pure Parts</div> <div>Pure Wire</div> </div>						
<div> <div>Areas</div> <div>Pick Zone - Area</div> <div>Atrium</div> </div>				<div> <div>Disciplines in Atrium</div> <div>Refresh</div> <div>Pick Discipline</div> <div>Audio</div> <div>Supplemental : Items</div> <div>Delete</div> </div>						
<div> <div>Products in Atrium</div> <div>Make Model Phase</div> <div>Linn : 5101 Personal Handset</div> <div>Audio : Universal learning remote</div> <div>2</div> </div>				<div> <div>Pure Supplement Parts in Atrium : Audio Discipline</div> <div>Parts Make Model</div> <div>Add Part</div> <div>Qty Make Model Phase Orig disp Unit Sell Ext Sell</div> <div> <div>1 ea Linn Aktiv Modules</div> <div>255.00</div> <div>255.00</div> </div> <div> <div>Audio Stereo or twin mono Aktive crossover</div> <div>1</div> <div>Supplement</div> </div> <div> <div>1 ea Linn Cirkus Kit</div> <div>645.00</div> <div>645.00</div> </div> <div> <div>Audio Main bearing upgrade for Sondek LP12</div> <div>2</div> <div>Supplement</div> </div> <div> <div>1 pr Linn Classik Brakit (3459)</div> <div>40.00</div> <div>40.00</div> </div> <div> <div>Audio Wall bracket for UNIK loudspeaker:</div> <div>3</div> <div>Supplement</div> </div> </div>						

Proposal - Pure Wire Supplements ?

Rudy & Cecilia Defiglia
Home Entertainment System
1292.1-1.100

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

Done

Areas Text Products
Labor Parts Wire Tasks

Pure Labor Pure Parts Pure Wire

Areas
Pick Zone - Area
Atrium

Disciplines in Atrium
Pick Discipline
Audio Supplemental : Items
Wire & Cable Supplemental : Items

Refresh Delete


Products in Atrium
Make Model Phase
Linn : 5101 Personal Handset
Audio : Universal learning remote 2


Pure Supplement Wire in Atrium : Discipline
Wire Make Model Add Wire


Qty	Make	Model	Phase	Unit Sell	Ext Sell	
150 ft	Linn	Bulk Analog interconnect	1	4.25	637.50	
Bulk	Home	Analog interconnect		Supplement		
150 ft	Linn	Bulk Silver Cable	2	15.25	2,287.50	
Bulk	Home	Silver analogue interconnect		Supplement		
150 M	Linn	K10 Cable	3	5.00	750.00	
Bulk	Home	Loudspeaker cable		Supplement		
1 pr	Linn	Black Interconnect	1	120.00	120.00	
Pre-Cut		Pair of phono-phono leads (Black cable)		Supplement		
1 ea	Linn	CAT5-40m	2	125.00	125.00	
Pre-Cut		Terminated CAT5 Knekt cable - 40m		Supplement		
1 ea	Linn	CAT5-60m	3	165.00	165.00	
Pre-Cut		Terminated CAT5 Knekt cable - 60m		Supplement		

Enhancement – Proposal/Print Menu: Contract Address 2 Option

You now have the option to show Client Address 2 on the Proposal Contract, instead of the Client Fav Address. The Client Address 2 can be labeled to your preference (Job Site, Billing etc). If Address 2 is empty you will be notified of this when you try to check off the option box. This enhancement is also on the Custom User Reports version 9.1v1. If you are using the Custom User Reports either upgrade your Report.fp5 file or Horizon can come online and tweak your copy.

 Fees & Services

 Contract ☒ Show Address 2 in Contract

 Extra Text

Fav **Address**

☒ **Address 1:** 101 current address

Cross Street

City: Oakland

State: CA Zip: 94607

County

Country

☐ **Bill To:** 14328 West Allmont

Cross Street

City: Chicago

State: IL Zip: 56743

County

Country

Copy Addresses

Enhancement – Proposal/Proposal Detail: Wire Manager

You can now enter the Wire Manager from the Proposal Detail screen, like you can from the Wire Supplement and Print Menu/Shop screen. When leaving the Wire Manager you will return to the screen from which you entered it.

Discipline	Area	Phase	Proposal - Detail by Area			Q View	Utility	?	Home
Client			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"/>	Wire Manager	Super View				Labor Meter	Labor Total	Grand Total	
Discipline : Category : Type			Make : Model			Description		Area Totals	
			Security System						
			Zone 1 - Basement					27,146.98	

Enhancement – Project/Wire Manager: Redesigned Wire Manager & Reports

Extensive work has been done on the Wire Manager to provide increased flexibility and usability.

Set the Head End Location: Load a Head End location so that you can click on the Head button on each End Product and assign a Head End to each one.

Set the Source Product –Install Locations: Each product can have an Install Location defined for it. This can be stored in the Proposal/Product Detail screen or by clicking on the Source Product – Install Location button.

Sort the screen and report by Discipline or Zone/Area: You can set the default Sort Order in the Master Prefs/Other/Project screen or click on the Sort buttons to change the sort order of the screens and reports.

Printer Setup button: Change the printer setup to print pdf or the printer of your choice with this button.

Auto Assign End – Head and Product buttons: Clicking on the Head button will assign a Head End to your End Product or clicking on the Prod button will pop up a list of all of the Products in your Project and you can select the desired End Product.

Override Product Location field: Selecting the desired End Product will automatically insert the Product Install Location for that Product or you can override it with manually entered text.

Head End Location		Proposal - Wire Manager				Sorted by Discipline		Printer Setup		?	
Head Locations	Load a Head End Location and Assign it to an Product End	Source Product	Mike & Jessica Potter			Discipline	Zone/Area	Wire Chart	Done	AutoSet Wire ID's	
House Audio Head End		Install Locations	Security System 1282.1-1.100			Discipline Type	Zone/Area Make/Model Wire ID	Wire Labels			
Source		Connected To				End					
Discipline	Source Product	Product Install Location	Wire Class	Wire Make - Model	Auto Assign End	Auto Entry	Head End or Product End	Product Install Location	Override Entry	Wire ID	
Audio Bookshelf	1 - Basement - Linn : Katan	Bulk	Linn : K20 Cable	Linn : K20 Cable	Head	Prod	House Audio Head End			Src-0001	
	Install Location 2	Room Run	Loudspeaker cable							End-0001	
Audio Bookshelf	1 - Basement - Linn : Katan	Bulk	Linn : K20 Cable	Linn : K20 Cable	Head	Prod	Security Cabinet			Src-0002	
	Install Location 2	Room Run	Loudspeaker cable							End-0002	
Audio Bookshelf	1 - Basement - Linn : Katan	Bulk	Linn : K20 Cable	Linn : K20 Cable	Head	Prod	1 - Basement - Linn : 5125			Src-0003	
	Install Location 2	Room Run	Loudspeaker cable				Install Location 1			End-0003	
Audio Bookshelf	1 - Basement - Linn : Katan	Bulk	Linn : K20 Cable	Linn : K20 Cable	Head	Prod	1 - Basement - Linn : Melodik			Src-0004	
	Install Location 2	Room Run	Loudspeaker cable				Install Location 3			End-0004	
Audio Bookshelf	1 - Basement - Linn : Katan	Bulk	Linn : K20 Cable	Linn : K20 Cable	Head	Prod	1 - Home Theater - Linn : Klimax Chakra 500			Src-0005	
	Install Location 2	Room Run	Loudspeaker cable				Override Location			End-0005	

2/4/2012


EME Audio & Video Systems

Page 1

Wire & Cable Chart

Sorted by Discipline

Mike & Jessica Potter
Security System
1282.1-1.100



Type	Qty	Source	End				
Bulk/Pre Cut		Source ID	Zone - Area - Make : Model Install Location (Source)	Discipline	Zone - Area - Make : Model Install Location (End)	End ID	Done
Audio							
Bookshelf			1 - Home Theater - Linn : Katan Install Location 9		1 - Home Theater - Runco : CL-610 Install Location 11		
B	75 ft	Src-0006	Loudspeaker cable - Linn : K20 Cable			End-0006	
Bookshelf			1 - Home Theater - Linn : Katan Install Location 9		1 - Home Theater - Linn : 5125 Install Location 8		
B	75 ft	Src-0007	Loudspeaker cable - Linn : K20 Cable			End-0007	
Bookshelf			1 - Home Theater - Linn : Katan Install Location 9		1 - Home Theater - Linn : 5101 Personal Handset Install Location 13		
B	75 ft	Src-0008	Loudspeaker cable - Linn : K20 Cable			End-0008	
Bookshelf			1 - Home Theater - Linn : Katan Install Location 9		1 - Basement - Sony : DVP-NS999ES Install Location 5		
B	75 ft	Src-0009	Loudspeaker cable - Linn : K20 Cable			End-0009	
Bookshelf			1 - Home Theater - Linn : Katan Install Location 9		1 - Home Theater - Linn : 5125 Install Location 8		
B	75 ft	Src-0010	Loudspeaker cable - Linn : K20 Cable			End-0010	
Bookshelf			1 - Basement - Linn : Katan Install Location 2		House Audio Head End		
B	75 ft	Src-0001	Loudspeaker cable - Linn : K20 Cable			End-0001	
Bookshelf			1 - Basement - Linn : Katan Install Location 2		Security Cabinet		
B	75 ft	Src-0002	Loudspeaker cable - Linn : K20 Cable			End-0002	

Enhancement – Project/Change Order: Always Add Fees option

In the Master Prefs/Other/Misc 2 screen, you now have the option to Always Add Fees to new Change Orders and suppress the user pop up option.

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

Change Order Preferences

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

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

☐ Always Add Fees to a new Change Order and suppress user pop up option.

Discipline	Area	Phase	Master Project - Detail by Area		Q View	Utility	?	Home
Client	Areas	Area Text	Mike & Jessica Potter		Pricing	Purchasing	Leave	
Project	Info	Products	Home Theater System		Tracker	Work Orders	Change Orders	
Contact	Log	Supplements	1285.1-1.100		Payments	Invoicing	Print Menu	
Client Mode	Wire Manager	Super View			Labor Meter	Labor Total	Grand Total	
Discipline : Category : Type			Status	Area Totals				
Audio : Multi-room : Keypad			A c1	1	3,650.00			
Audio : Amplifier : Multi-channel				1	universal 390.00			
Audio : Speaker : Bookshelf				5	27,146.98			
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			

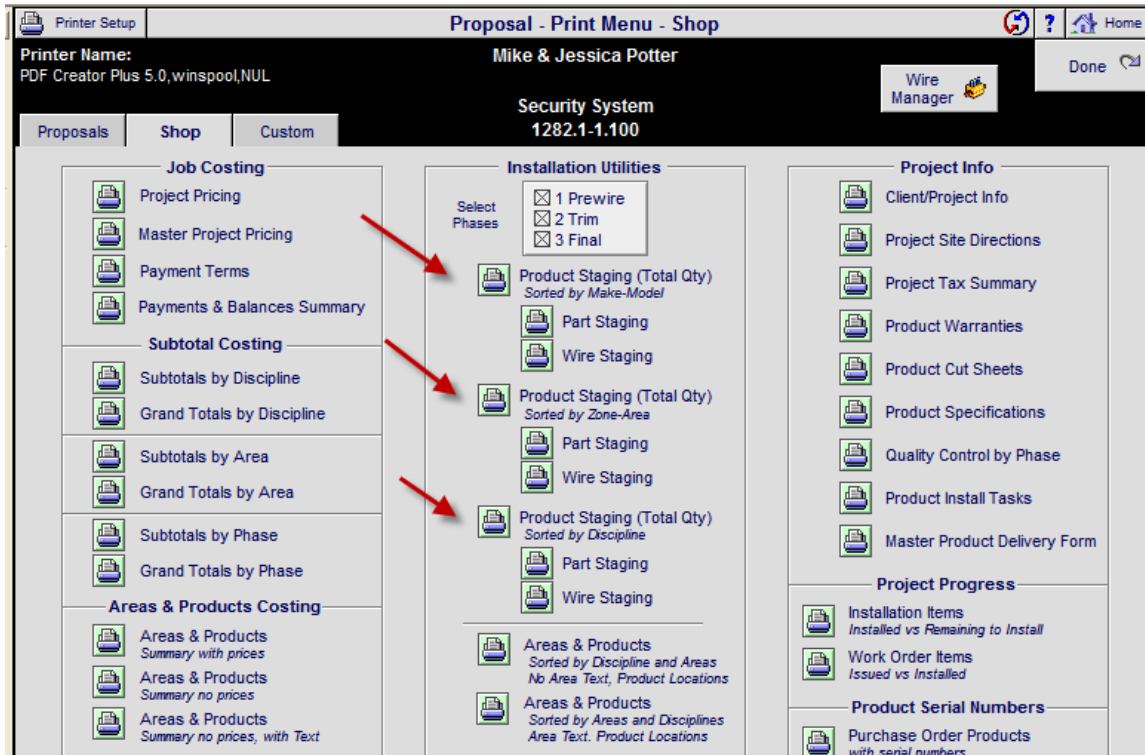
Message

Do you want to Add Fees automatically to this Change Order?

No Yes

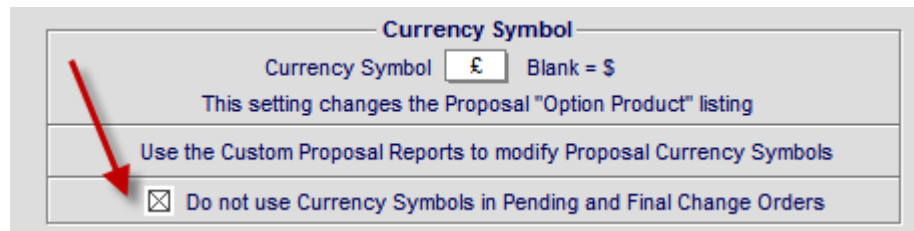
Enhancement – Project/Print Menu/Shop: New Staging Reports

The Staging Reports have been completely redesigned for improved accuracy. Instead of having 1 report for Products, Parts and Wire, they are separated into 3 separate reports, for each group. Group 1 is sorted by Make & Model. Group 2 is sorted by Zone-Area and then Make & Model. Group 3 is sorted by Discipline and then Make & Model. These reports sum all of the quantities of like kind Products, Parts and Wire and include Finish. You can check which Phase you want to show in your reports before print them as well.



Enhancement – Project/Pending & Final Change Orders: \$ Currency Symbol Print Options

In the Master Prefs/Other/Misc 2 screen, you now have the option to print Pending and Final Change Orders without Currency Symbols by checking this box. If this box is not checked, then Pending and Final Change Orders will show \$ currency symbols on all numbers.



Enhancement – POS/Quotation: Archive Quote after Converting to a Sales Invoice

When a POS Quotation is Converted to a Sales Invoice it is now automatically Archived and moved into the Archived Quotation List. This stops confusion with the new Sales Invoice. You can always go into the Archived Quotation List and create another Sales Invoice from the Original Quotation. This enables you to sell partial items from a Quote. A message stating that the Quote has been converted is displayed as well.

POS - Quotation Pick Price Cue ☐ Sold ☐ Home

Print: ☐ Show List Price Column
 Preview: ☐ Do not show Labor Detail

Quotation
QT #7195

Convert Quote to a Sales Invoice Costing Done

Set Up Prev Next

This Quotation has been Converted to a Sales Invoice

Label Address 2: ☐ Show ☐ Hide 1 of 1

Cecilia Christenson
Wade Realty
567 58TH Street
Oakland, CA 94607

Home: 808-262-2614
Work: 808-263-3313
Fax: 808-261-1074

Cecilia Christenson
Wade Realty

1/1/2011

Ship VIA Payment Terms Reference # Sales Rep Quotation Title

Quotation prices good for 30 days Jon Osterx

Pick	Qty	unit	Product Description	Install (h:m:s)	Unit Price	Ext Price	Tax A B
1	ea	Linn : Classik Music-B : Integrated CD player/tuner/preamp/power amplifier : Blue	0:30:00	1,550.00	1,550.00	T T	
2	ea	Linn : 5101 Personal Handset : Universal learning remote : Black	1:15:00	390.00	780.00	T T	

Enhancement – POS Quotations: List Price Option

You now have an option in POS Quotations to Show an Extended List Price Column next to the Extended Sell Price and a List Price Grand Total. Check off the option before Printing or Previewing. When you pick a product from the Product Library the List Price of that product will come into your POS Quotation and you can modify it if you wish.

POS - Quotation Pick Price Cue ☐ Sold ☐ Home

Print: ☒ Show List Price Column
 Preview: ☐ Do not show Labor Detail

Quotation
QT #7195

Convert Quote to a Sales Invoice Costing Done

Set Up Prev Next

This Quotation has been Converted to a Sales Invoice

Label Address 2: ☐ Show ☐ Hide 2 of 3

Cecilia Christenson
Wade Realty
567 58TH Street
Oakland, CA 94607

Home: 808-262-2614
Work: 808-263-3313
Fax: 808-261-1074

Cecilia Christenson
Wade Realty

1/1/2011

Ship VIA Payment Terms Reference # Sales Rep Quotation Title

Quotation prices good for 30 days Jon Osterx

Pick	Qty	unit	Product Description	Install (h:m:s)	Unit Price	Ext Price	Tax A B	Unit List	Ext List	up dn
1	ea	Linn : Classik Music-B : Integrated CD player/tuner/preamp/power amplifier : Blue	0:30:00	1,550.00	1,550.00	T T				
2	ea	Linn : 5101 Personal Handset : Universal learning remote : Black	1:15:00	390.00	780.00	T T	500.00	1,000.00		
1	ea	Sony : SLV-N99 : VHS Video Cassette Recorder	0:30:00	199.00	199.00	T T	350.00	350.00		

EME Audio & Video Systems
 2950 Mall Drive
 Eau Claire, WI 54701
 715-287-3335



QUOTATION
 QT #7195
 1/1/2011

Cecilia Christenson
 Wade Realty
 567 58TH Street
 Oakland, CA 94607

Home: 808-262-2614
 Work: 808-263-3313
 Fax: 808-261-1074

Address 2:

Cecilia Christenson
 Wade Realty

Ship VIA	FOB	Terms	Reference #	Sales Rep
		Quotation prices good for 30 days		Jon Osterx

Qty	Description	Price	Total	List
1	ea Linn : Classik Music-B : Integrated CD player/tuner/preamp/power amplifier : Blue	1,550.00	1,550.00	
2	ea Linn : 5101 Personal Handset : Universal learning remote : Black	390.00	780.00	1,000.00
2	ea Linn : 5101 Personal Handset : Universal learning remote : Black	390.00	780.00	1,000.00
500	ea Linn : 5101 Personal Handset : Universal learning remote : Black	390.00	195,000.00	250,000.00

Estimated Services	Hours	Rate	Amount
Equipment Installation:	630:30:00	80.00	50,440.00
Total Labor:	630:30:00 Hrs		50,440.00

Line Items:	198,110.00	252,000.00
Labor:	50,440.00	
Other:		
Subtotal:	248,550.00	
Tax:	10,896.05	
Freight:		
Total:	259,446.05	

Enhancement – All POS Invoice Setup Screens: New Layout and Switch or Modify Utility

All Quotations, Sales Invoice, Work Order, Change Order, Service Order, Purchase Order, and Return Authorization Setup screens have been modified for better comprehension. A new Modify or Switch Contact utility will take you either to your Contact list to pick a new contact or to this Contact Detail screen in Contacts to Modify this contacts information.

The clients Favorite Email address now appears on the POS Setup screen and on the printed Invoice. You can also now send an email to this contact directly from the setup screen by clicking on the eMail icon.

POS - Invoice Set-Up

Invoice
SI #7210

Done

Primary Contact

Modify or Switch Contact

Contact Cecilia Christenson
Company Wade Realty
Address 567 58TH Street
City Oakland
St, Zip, Country CA 94607
Home Phone 808-262-2614
Work Phone 808-263-3313
Mobile
Fax 808-261-1074
Email cecilia@christenson.com

eMail

Second Label Contact

Label Salutation
Address 2: Cecilia Christenson
COMPANY Wade Realty
ADDRESS
CITY
ST, ZIP, COUNTRY

Copy 1>2

Permanent Contact Client Notes

5Hr. time difference
Pager 808-251-2353

Select Tax Rate

Add New Tax Location

Eau Claire 5.50% = 5.50%

Pick	Location	Tax A	Tax B	=	Total
<input checked="" type="checkbox"/>	Eau Claire	5.50%			5.50%
<input checked="" type="checkbox"/>	Menomonie	4.00%	0.50%		4.50%
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Tax Preferences

Show Tax ? ☒ YES ☐ NO
Show AB Tax Don't Show
Tax Labor? No
Tax Labor AB A

Other Preferences

Change Date 1/29/2012
Clearing this field will revert back to original creation date
Hourly Labor: \$80.00
Hide Labor Matrix Show when Printing

Enhancement – POS/Service Invoice: Condense Single Page and 3 Page Printed Invoices

The Single Page Service Invoice fields have been tightened to provide more space for the expanding text fields. 3 lines of text entered into these text fields enables the Service Order to be printed on a single page. If you enter more than 3 lines of text and/or want to provide more space in these fields for handwritten text, then use the 3 page printed Service Order.

The screenshot displays the 'POS - Service Order' application window. At the top, there's a menu bar with 'Print Setup', 'Delete SO', 'Done', 'Archive', and navigation icons. Below this is a toolbar with 'Print', 'Preview', 'View', 'Add RMA', 'Set Up', and 'Done'. The main header shows 'SO #6351' and '1 of 1'. The date '3/11/2005' is on the left, and 'Label JOB SITE: Show Hide' is on the right. The address 'Dan Black, Black/Gideon, 20 Elm Avenue, Toronto, ON M4W 1N5' is repeated in two columns. A 'Master Tracker Appointment' section includes 'Requested Installer', 'Add', 'Edit', and 'Appointment' fields. A 'Message' dialog box is open in the center, titled 'Message', with the text 'Preview Single Page or 3 Page Service Order.' and two buttons: '3 Page' and 'Single Page', with a 'Cancel' button. Red arrows point to these buttons. Below the dialog, there are fields for 'Salesman', 'Project Manager', 'Site Survey By', 'Estimate By', 'Make', 'Model', 'Serial Number', and 'Description of Problem'. The 'Description of Problem' field contains text about a VKP in a master area bathroom. At the bottom, there's a section for 'Date Scheduled', 'Time Scheduled', 'On-Site Log Notes', and a table for '1 Visit Date', '2 Visit Date', '3 Visit Date', and '4 Visit Date' with columns for 'Hours', 'Tech', and 'Notes'.

Print Setup Delete SO POS - Service Order Done Archive Home

Print Preview View Add RMA Set Up Done

SO #6351 1 of 1

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

Salesman: Project Manager: Site Survey By: Estimate By:

Make Model
Serial Number
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.

Contractor Ph: Super Phone: Special Phone: Anty:

Message
Preview Single Page or 3 Page Service Order.
3 Page Single Page Cancel

Date Scheduled: Time Scheduled: On-Site Log Notes

1 Visit Date:	Hours:	Tech:	Notes:
2 Visit Date:	Hours:	Tech:	Notes:
3 Visit Date:	Hours:	Tech:	Notes:
4 Visit Date:	Hours:	Tech:	Notes:

Enhancement – POS/Work Order: New Work Performed field

A Work Performed field has been added to the POS Work Order and it appears on screen and on the printed Work Order.

POS - Work/Change Order WS #7124

9/15/2005 Label Address 2: ☐ Show ☐ Hide WO Total Time 0:00

Ginette Charette
108 Cheltenham Avenue
North York, ON M4N 1P9

Master Tracker Appointment
Requested Installer
Add Edit
Appointment:

Job Contact:
Job Location:
Job Phone:
Proposal No: Cust. No:
Terms: Due Upon Receipt of Invoice

Service Requested:
Install fan in cabinet to assist with equipment cooling

Special Instructions:

Work Performed
The Work Performed field enables you to enter text and appears on the printed Work Order.

Order Written By: Chad Trude

Work Order Appointment
Date Day Time
Start Date: Finish Date:
Start Time: Finish Time:
Installer: Done:
Start Date: Finish Date:
Start Time: Finish Time:
Installer: Done:
Start Date: Finish Date:
Start Time: Finish Time:
Installer: Done:
Reschedule
Reason

Enhancement – Proposal/Q View/Products: Remove Product Cost

The Product Unit Cost now does not show if the Client Mode is checked when using the Proposal/Q View feature, so that you can view products in front of a client.

Proposal - Detail by Area

Client: Rudy & Cecilia Defiglia
Project: Info Products Overviews
Contact: Log Supplements Project Fees
Client Mode ☒ Wire Manager Super View

Discipline: Category: Type Make: Model Description Area Totals

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

Q View Pricing Purchasing Leave
Tracker Work Orders Change Orders
Payments Invoicing Print Menu
Labor Meter Labor Total Grand Total

Product Library - Quick View List

Find Products Fav A B C Recent AlphaFind: Make ☒ Hidden ☐

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 Hidden Products
Bulk PreCut

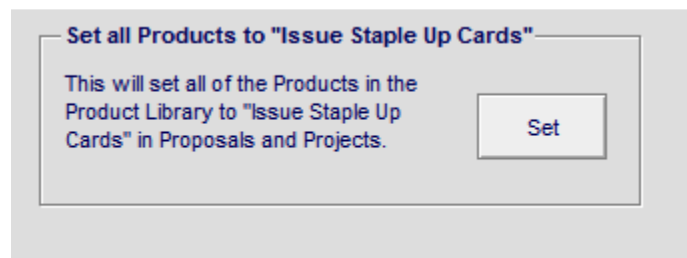
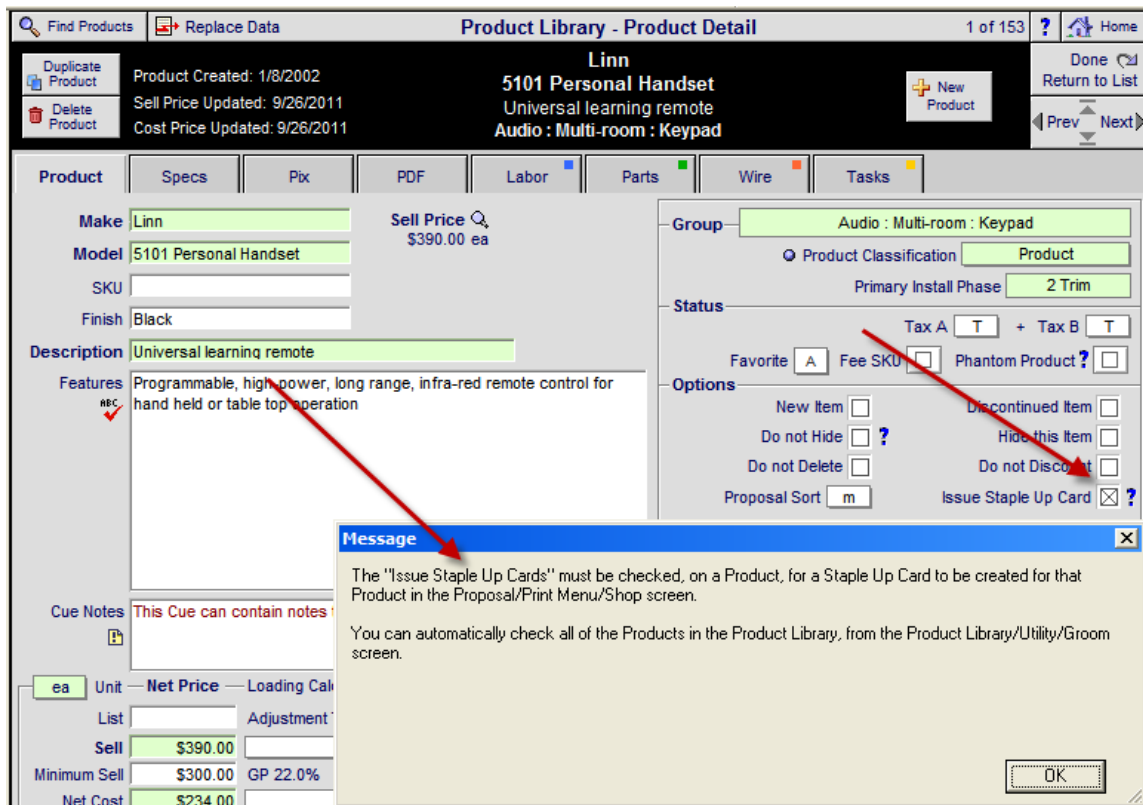
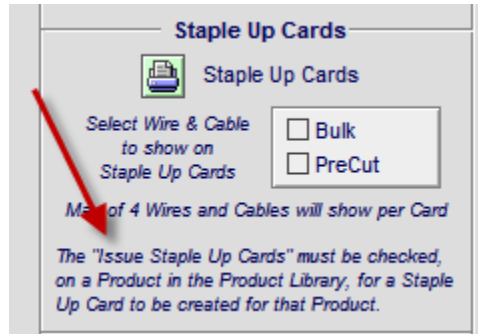
EME audio & video

132 Items 179 Total Phan Part Lab Wire

Displn	Cat	Type	Class	Make	Model : SKU	Description	Finish	Sell Price (Installed)	Hide Fav
Audio	Multi	Keypad	<input type="radio"/>	Linn	5101 Personal Handset	Universal	Black	390.00 ea	<input type="checkbox"/> A
Audio	Ampli	Surround Process	<input type="radio"/>	Linn	5103 System Controller	Linn 5103 inc		5,500.00 ea	<input type="checkbox"/> A
Audio	Ampli	Multi-channel	<input type="radio"/>	Linn	5125	Five channel	Silver	2,750.00 ea	<input type="checkbox"/> A

Enhancement – Product Library/Utility/Grooming Utility: Auto set “Issue Staple Up Cards”

You can now automatically check all of the products in your Product Library to “Issue Staple Up Cards” in your Proposals and Projects. A pop up Help ? button has been added to the Product Library as well.



Enhancement – Listen Up Product Library RCMS import routine: Update Descriptions

When importing RCMS data in the SCPS Product Library the RCMS descriptions will overwrite the SCPS product descriptions.

Listen Up
Audio Video

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, and 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

Fix – Proposal/Areas & Products/Pick Products: 0 Qty trap

When picking products into a Proposal: If you put a 0 qty into a Product and then click on the Pick button, you will get a notice saying “There are no Picked Products”, but then it would proceed to place all of the products, in your library, into the Proposal. This has been corrected. Products with a 0 qty are not valid and will not cause all of your products to be added to your proposal.

Find Products Fav A B C Recent

Product Library - Pick Products

AlphaFind: Make Hidden

Show Products

Part Phantom

Bulk PreCut

Proposal Products Clear Picked

Hidden Products Show Picked

Add Products to

Atrium

153 Items 179 Total

New Product

Phan Lab Wire

Pick Cancel

Displn	Cat	Type	Class	Pick Qty	Make	Model : SKU	Description	Finish	Sell Price (Installed)	Show Hide Fav
Audio	Speak	Center Channel		0 ea	Klipsch	RC-35	Center Channel	Black	399.00 ea	[A]
Audio	Speak	Floor		ea	Klipsch	RF-35 (6483)	Reference	Black	499.00 ea	[A]
Audio	Speak	Bookshelf		ea	Klipsch	RS-7	Reference	Matte	450.00 ea	[A]

Fix – Project/Change Orders: Set Tax Flags to Master Project and not Master Prefs

When you create a new Change Order, the Subtotal Tax Flags are now set to the Master Project settings and not the Master Pref settings, just like the Tax Location and Tax Rate.

Master Project - Tax Summary - View

Print ?

Dave Dowling

Home Entertainment System

1291.1-1.100

Tax Summary	Sell	Tax A	Tax B	Total Tax
Equipment	\$390.00		\$0.00	= \$0.00
Installation	\$582.50	\$17.29	\$0.00	= \$17.29
Misc. Parts	\$1,085.00	\$35.70	\$0.00	= \$35.70
Wire & Cable	\$1,312.50		\$0.00	= \$0.00
Additional Fees	\$76.35			=
Total	\$3,446.35	\$52.99	\$0.00	= \$52.99

Tax Rate			
Location	A Tax Rate	B Tax Rate	Total Tax Rate
Eau Claire	5.500%		5.500%

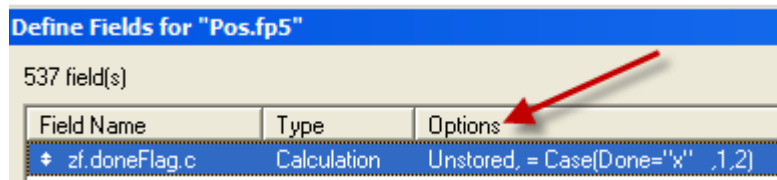
Tax Status by Subtotal			
	A Tax Rate	B Tax Rate	
Products	E Exempt	T Taxable	
Labor	I Installed-taxed on cost	T Taxable	
Misc Parts	I Installed-taxed on cost	T Taxable	
Bulk Wire & Cable	E Exempt	T Taxable	
Pre-Cut Wire & Cable	E Exempt	T Taxable	

Fix – Final Change Orders, Completed, Archived Projects: Stop Double Posting Pricing Totals

When you go into the Pricing screen the Totals are posted and this was causing the totals on Completed projects to be double posted. This has been eliminated for Completed Projects, Final Change Orders and Archived Projects.

Fix – POS/Work Orders: Alpha Finder now finds all Invoices


The AlphaFinder in the POS Work Order List view now finds all of the Work Orders. The field that stores the Done flag is not updating and has been changed to “Unstored” so that it is always current.



Define Fields for "Pos.fp5"

537 field(s)

Field Name	Type	Options
zf.doneFlag.c	Calculation	Unstored, = Case(Done="x" ,1,2)

REC ✓ Spell		Master Prefs - Proposal Prefs - Client Introduction			Print	Home
Cover Page	Text & Fees	Contracts	Proposal Print Options	Done		
Client Intro	Overviews	Terms				
Shop Intro	Extra Pages	Pricing				
Please stay within field borders						
Location 01		Dear Client Name Use First Name <input type="checkbox"/>				
		While many companies in the area sell and install electronics, only ListenUp can bring over 35 years of experience and knowledge to your project. As one of Colorado's largest and oldest electronic integration companies, we have significant expertise in the design and installation of residential, commercial, and professional systems. ListenUp is unique in the level and depth of service we offer - our certified programmers, designers, and technicians can skillfully execute the design and installation of any size or type of system.zs				
		Choosing a ListenUp system is a smart investment that will give you many years of enjoyment and pride of ownership. We have thousands of satisfied customers, and as a result we have won numerous industry awards and received frequent recognition for our dedication to service and the quality of our products.				
		Applying this same attention to detail and quality, we have carefully prepared this proposal based on the design and budget criteria developed in our previous discussions. It includes a list of equipment by area. Where necessary there is also a written description of the system functionality and comments regarding any issues or concerns for the specified area. Please				